

WASHINGTON STATE
BAR ASSOCIATION

BOARD OF GOVERNORS MEETING

May 2, 2025

Meeting Materials

Port Angeles, WA
Zoom and Teleconference



**Board of Governors Meeting
Red Lion Hotel, Port Angeles, WA
May 2, 2025**

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 by Zoom or Teleconference:

Friday, May 2: Meeting ID: 828 7932 4444 Passcode: 899686
<https://wsba.zoom.us/j/82879324444?pwd=jJ7x9V2Qey47hjIGROV4ai39zD3mF7.1>

To participate by phone, call +1 253-205-0468

FRIDAY, MAY 2, 2025

9:00 AM – CALL TO ORDER & WELCOME

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

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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*.

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- Approve March 21-22, 2025, Board of Governors Meeting Minutes.....13

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11:30 AM - 1:30 PM – RECESS

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- ☐ **GOVERNOR ROUNDTABLE**

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- ☐ **MEETING FEEDBACK**

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5:00 PM – ADJOURN

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WASHINGTON STATE BAR ASSOCIATION

TO: WSBA Board of Governors
FROM: Executive Director Terra Nevitt
DATE: April 18, 2025
RE: Executive Director's Report

Winter Bar Exam Results

Congratulations to the 135 folks that passed the February 2025 Lawyer Bar Exam! The overall pass rate for the exam was 43%, which is a decrease from the pass rates for the exams in February 2024 (47%) and February 2023 (52%). Note that the pass rates for July exams are generally significantly higher. The pass list is available on our [website](#), where you can also find information about bar exam pass rates.

Board of Governor Elections

The elections for the congressional district positions for the Board of Governors concluded at 5pm on April 1, 2025. Congratulations to Gov. Kari Petrasek and Gov. Nam Nguyen who were reelected to Districts 2 and 10, respectively. Voter turnout was 10.45% for District 2 and 12.49% in District 10. More information about the election results is available [here](#).

The application period for the Governor At Large position closed at 5pm on Tuesday, April 15. WSBA received applications from Gov. Christopher Bhang (incumbent), Uzma Hamid, and Scott Stafne. Following the process set forth in the WSBA Bylaws, the Diversity, Equity, and Inclusion Council will interview the applicants on April 30 and forward candidates for election by the WSBA membership. The election will take place from May 15-June 2. Additional election information is available [here](#).

Inaugural Bar Leaders Summit

After many months of dreaming and planning, the inaugural Bar Leaders Summit is nearly here! It will be held at the WSBA Office on April 25, 2025, with a welcome dinner on April 24. All Governors should have a calendar invitation and are encouraged to attend. It looks like we will have a great turnout, with 60+ county and affinity bar leaders registered to attend. The agenda will be focused on the issues bar leaders have told us are most relevant and urgent: networking, learning about volunteer engagement and recruitment, sharing WSBA resources, etc.

WSBA Ambassador Program to Kick-Off on Law Day, May 1, 2025

A reminder that the [Rule of Law Ambassador Program](#) will kick-off on May 1, with events all over the state, including Bellingham, Colville, Kelso, Kent, Seattle, Spokane, the Tri-Cities, and Vancouver. There will also be an anchor event with the Supreme Court in Olympia, with in-person and virtual components. These events are an opportunity for Washington's legal community to re-affirm their professional oath to uphold the Constitution and stand together to

commit to the promise of the rule of law. We hope to have members of the Board of Governors at as many of the events as possible. Folks can RSVP for an event [here](#). Note that an RSVP is not necessary, but will help our tracking!

As part of the kick-off events, we will be releasing a toolkit to support attorney engagement in their local communities to provide reliable information about the legal system and the rule of law. Following our May 1 events, we will host our first Ambassador CLE training at noon on Tuesday, May 6. See the [website](#) for up-to-date information.

Attachments

Q2 FY25 Budget Reallocations

Media Report

[Member Demographics Report](#)

[Litigation Report](#) (confidential)

WASHINGTON STATE BAR ASSOCIATION

To: Board of Governors
Budget and Audit Committee

From: Terra Nevitt, Executive Director

Date: April 7, 2025

Subject: FY 2025 Budget Reallocations for Q2

Background

WSBA Fiscal Policies allows the Executive Director to approve the reallocation of budgeted and unbudgeted expenditures within certain limitations. Specifically, the policy states:

"The Executive Director approves and reports to the Board of Governors about certain unbudgeted expenses, including reallocations of budgeted expenditures where the intent is similar or varies slightly; unbudgeted expenditures that are fully offset by unbudgeted revenue or a reallocation of budgeted expenditures up to 5% of the approved operating budget to address operational, regulatory or programmatic needs; and necessary and prudent expenditures to implement WSBA's Disaster Recovery Plan or to maintain WSBA's operations. Per occurrence limit is \$215,000.00. Reallocations may not affect the annual budget's bottom line. The Executive Director must report reallocation of funds to the President on a monthly basis and to the Board on a quarterly basis. It is expected that the Executive Director will consult with the President on reallocations that may be considered sensitive or controversial in nature, prior to execution."

President Anjilvel was notified of the monthly reallocations on February 10, March 10, and April 7.

For FY 2025, the WSBA's annual operating budget is \$27,956,320 and the Executive Director's limit for reallocation is up to \$1,397,816 (5%). The total amount of funds reallocated from October 1 through March 31st are \$168,034.30 (0.60% of annual operating budget).

FY25 Budget Reallocations for Q2

1. *Salaries, Benefits & Other Indirect Expenses* – WSBA indirect expenses are allocated to cost centers based on the estimated amount of staff time spent doing work to support the cost center. The estimates are developed during the budget process each year and can change from time to time. A reallocation of staff time was approved between the Communications Strategies, Office of Executive Director, and Board of Governors cost centers for a total of \$71,064 in salaries, benefits, and other indirect expenses. There is no net impact on the budget and all expenses remain within the General Fund.
2. *Temporary Staffing:*
 - a. Unanticipated temporary staffing support was needed during a staff leave of absence for the Regulatory Services Department. The estimated cost of \$1,500 was reallocated from the temporary staff budget in the Licensing and Membership Records cost center to the remaining Regulatory Services Department cost centers.
 - b. Funds are needed to complete our project to transfer from paper to electronic records, specifically

for temporary staff time to scan remaining documents in the amount of \$10,120. Funds are available from the Furniture, Maintenance, and Leasehold Improvement budget to support this need.

3. *Capital Computer Hardware*- WSBA has three servers that need to be replaced and are considered a capital purchase which means the cost of the items will be depreciated over the useful life of the server (3 years). We have funds available in the Salaries and Retirement benefits budgets in the Technology cost center (resulting from an open position that is planned to be held vacant for the fiscal year) that have been reallocated to support this hardware need.
4. *BOG Retreat*- The FY25 budget was intended to cover two retreats for the Board of Governors, one in October and another in July. Expenses for the October retreat were higher than expected so additional funds in the amount of \$3,000 are needed to support the July retreat and available to be reallocated from the BOG Conference Attendance budget.

WASHINGTON STATE BAR ASSOCIATION

MEMO

To: Board of Governors

From: Jennifer Olegario, Communications and Outreach Manager, and Sara Niegowski, Chief Communications Officer

Date: April 8, 2025

Re: Summary of Media Contacts, Feb. 18-April 8, 2025

Date	Journalist and Media Outlet	Inquiry
March 3	Megan Ulu-Lani Boyanton, Denver Post	Inquired about grievances against a member. Told her there is no public information for that person.
March 10	Rachel Riley, Law360	Inquired whether the just-scheduled special meeting was in reaction to an executive order regarding Perkins Coie. Responded that we were not able to provide more information.
March 13	Amy Radil, KUOW	Wanted to receive a copy of the statement adopted by the Board in support of an independent judiciary; inquired about the vote to adopt it.
March 19	Sara Merken, Reuters	Asked for update on Entity Regulation Pilot Project; worked with RSD leaders to provide information, sent her TVW recording of update at meeting with Supreme Court.
March 25	Madeline Otilie, Cox Media Group (KIRO 7)	Asked for a referral to an immigration lawyer for an article about green-card revocation. Found an immigration attorney to return her call.

March 28	Amy Radil, KUOW	Inquired about an immigration attorney to answer questions about student visa holders. Found two immigration attorneys to refer her to.
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News Coverage

- ["50-Year Resident and Green Card Holder Being Held in Ice Detention in Tacoma,"](#) KIRO7, March 25
- ["Over 50 Bar Associations Stand Up for the Rule of Law,"](#) Above the Law, March 26
- ["Public Defense Unions Raises Concerns Over Constantine's Pick for DPD Director,"](#) PubliCola, March 29

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WASHINGTON STATE BAR ASSOCIATION

BOARD OF GOVERNORS SPECIAL MEETING MINUTES

Virtual
March 12, 2025

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 Sunitha Anjilvel on Wednesday, March 12, at 7:03 p.m. Governors in attendance were:

Chris Bhang
Mary Rathbone
Matthew Dresden
Tom Ahearne
Kevin Fay
Kristina Larry
Todd Bloom
Nam Nguyen
Allison Widney
Jordan Couch
Kari Petrasek
Emily Arneson
Parvin Price
Alain Villeneuve

Officers and Executive Staff in attendance were President Sunitha Anjilvel, President-Elect Francis Adewale, Immediate-Past President Dan Clark, Executive Director Terra Nevitt, Chief Regulatory Counsel Renata Garsia, Director of Finance Tiffany Lynch, General Counsel Laurie Powers, and Chief Disciplinary Counsel Doug Ende

Also in attendance were Ann Christian, Aziza Ozgoren, Jennifer Olegario, Darren Carnell, Cat Connell, Paul Apple, Brian Tollefson, Nancy Hawkins, Oliver Garrison, Barbara Prowant, Fabiola Jimenez, Bruce Turcott, Julia Doherty, and Mike Brandenburg.

Executive Session

President Anjilvel moved the Board to executive session at 7:05 p.m. to receive legal advice regarding and discuss actions targeting legal professionals. The session concluded at 8:15 p.m. and the Board resumed the public session. Gov. Jordan Couch moved to approve a statement in Support of an Independent Legal Profession Free from Government Retaliation. Motion passed 13 to 1.

Adjournment

There being no further business, President Anjilvel adjourned the meeting at 8:25 p.m. on Wednesday, March 12, 2025.

Respectfully submitted,

Terra Nevitt
WSBA Executive Director & Secretary

WASHINGTON STATE BAR ASSOCIATION

BOARD OF GOVERNORS MEETING MINUTES

Shelton, WA

March 21-22, 2025

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 Sunitha Anjilvel on Friday, March 21, at 1:02 p.m. Governors in attendance were:

Chris Bhang
Mary Rathbone
Matthew Dresden
Tom Ahearne
Kevin Fay
Kristina Larry
Todd Bloom
Nam Nguyen
Allison Widney
Jordan Couch
Kari Petrasek
Emily Arneson
Parvin Price
Alain Villeneuve

Officers and Executive Staff in attendance were President Sunitha Anjilvel, President-Elect Francis Adewale, Immediate-Past President Dan Clark, Executive Director Terra Nevitt, Chief Communications and Outreach Officer Sara Niegowski, Director of Finance Tiffany Lynch, Chief Regulatory Counsel Renata Garcia, Director of Advancement Kevin Plachy, Chief Equity & Justice Officer Diana Singleton, General Counsel Laurie Powers, Deputy Director Dua Abudiab, Chief Disciplinary Counsel Doug Ende and HR Director & Chief Culture Officer Glynnis Klinefelter Sio.

Also in attendance were Ann Christian, Aziza Ozgoren, Betsylew Miale-Gix, Brent Williams-Ruth, Bob Boruchowitz, Bonnie Sterken, Carolyn MacGregor, Catherine Schur, George Yeannakis, Greg Lamm, Follis Stark, Jennifer Olegario, Julianne Unite, Kalin Bornemann, Liz Mustin, Maialisa Vanyo, Melissa Bailey, Nancy Hawkins, Paris Eriksen, Raina Wagner, Rex Nolte, Sharon Sakamoto, Shelly Bynum, Tamara Garrison, Vanessa Sweeney and Wen James Min.

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

President Anjilvel opened the session for member and public comments. Tamara Garrison inquired about the Board's GR 12.2 analysis related to a recent statement on an independent legal profession. Executive Director Nevitt confirmed that a thorough analysis was conducted, ensuring alignment with WSBA's purposes as a mandatory bar. Wen James Min asked about the inclusion of public board members, which would be addressed later in the agenda. Brent Williams-Ruth expressed concerns about delays in the Bar Licensure Task Force's character and fitness report. Executive Director Nevitt provided an update on recent correspondence with the Supreme Court regarding the report.

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

President Anjilvel encouraged to share bar activities and talking points with their communities to maintain transparency.

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

Executive Director Terra Nevitt referred to her written report and invited questions. There were none.

Consent Calendar ([link](#))

Executive Director Nevitt introduced the consent calendar. Gov. Kevin Fay moved to for approval. Motion passed unanimously.

Update & Implementation Challenges Re Standards for Indigent Defense ([link](#))

Maialisa Vanyo, Chair of the Council on Public Defense (CPD) and Liz Mustin from Washington State Office of Public Defense provided an update on the challenges with respect to implementation of the WSBA Standards for Indigent Defense approved by the Board of Governors. Chair Vanyo provided background information about the role of the CPD, and the development of the standards, noting that the WSBA standards are under review by the Supreme Court to consider aligning the related court rules with the updated WSBA Standards. Chair Vanyo highlighted the importance of ensuring effective legal representation by addressing defender workload and qualifications. She expressed concerns about funding shortfalls and recruitment challenges, particularly in rural areas. The Office of Public Defense has requested additional funding to support counties in meeting these standards, but the state budget situation remains uncertain. The Board discussed the ethical implications of attorneys managing excessive caseloads and the necessity of engaging with legislators to advocate for adequate funding and support for public defense. Further updates are expected at the May Board meeting.

First Reading: Equity and Justice Plan ([link](#))

DEI Council Co-Chairs Raina Wagner, along with Equity and Justice Plan Committee Co-Chairs Sharon Sakamoto and Miryam Gordon, presented the Equity and Justice Plan for its first reading. The Plan is the culmination of two years of collaborative work aimed at enhancing legal services through diversity, equity, and inclusion. The presenters emphasized the plan's role as a living document designed to guide WSBA's efforts in achieving equitable outcomes. Key discussions included the historical context of the plan, the importance of measurable outcomes, and the integration of the plan into WSBA's strategic framework. Feedback from the Board included the need for clear action items, regular demographic studies to track

progress, and the inclusion of diverse voices in the implementation process. Brent Williams-Ruth underscored the significance of leadership in executing the plan's objectives. The session concluded with a call for further input before the second reading, highlighting the plan's potential to shape WSBA's future initiatives.

First Reading: Proposal to Add Public Members to the Board of Governors ([link](#))

Gov. Jordan Couch, Volunteer Engagement Advisor Paris Eriksen, and Assistant General Counsel Cate Schur presented a proposal to add two public members to the Board of Governors. Gov. Couch emphasized the importance of including public perspectives to better serve the public, aligning with WSBA's mission. The proposal suggests that public members, appointed by the Washington Supreme Court, would serve three-year terms with voting rights and could serve as treasurer, though not in presidential roles. The discussion highlighted both support and concerns. After thorough discussion, the Board agreed to consider further feedback and explore potential compromises before a second reading.

Proposal to Create a BOG Governance Committee ([link](#))

President Anjilvel and General Counsel Laurie Powers presented the proposed governance committee charter, aiming to establish a systematic triennial review of bylaws, policies, and board committees. The proposal allows for flexibility in review timelines and includes provisions for staff support. Nancy Hawkins and Gov. Emily Arneson raised concerns about the potential top-down approach with respect to the evaluation of sections. Past Governor Brent Williams-Ruth clarified that the intent is to streamline and align bylaws, not to overhaul the organization. Gov. Fay emphasized that the review focuses on board committees, not sections. Gov. Kevin Fay moved to approve the governance committee charter as presented. The motion passed unanimously, with Gov. Alain Villeneuve was not present for the vote.

Recess

President Anjilvel recessed the meeting for the day at 4:55 p.m.

Day Two ([link](#))

President Anjilvel called day two of the board meeting to order at 9:11 a.m.

FY26 Budget Retreat ([link](#))

Treasurer Kari Petrusek, Finance and Director Tiffany Lynch, and Chief Communications Officer Sara Niegowski led a discussion on developing a license fee philosophy. The aim is to establish a consistent approach to setting license fees, emphasizing the importance of smaller routine adjustments rather than more infrequent, but more significant increases. The Board reviewed the role of the unrestricted reserve fund in supporting fee changes and considered the impact of inflation and cost-of-living adjustments on budgeting. Members discussed the need for transparent communication with the membership regarding fee adjustments, highlighting member benefits and WSBA's regulatory obligations. There was consensus on the importance of aligning fee structures with operational needs and member expectations. The Board agreed to gather member feedback on the proposed philosophy, aiming for transparency and engagement.

Discussion Re License Fee Hardship Exemption ([link](#))

Gov. Jordan Couch and Chief Regulatory Counsel Renata Garcia presented a proposal to expand the license fee hardship exemption. The proposal suggests increasing the exemption from two to three times in a career and adjusting the eligibility criteria from 200% to 270% of the federal poverty level (FPL), aligning with the Asset Limited, Income Constrained, Employed (ALICE) metric. The proposed changes aim to support members experiencing financial hardship, acknowledging the economic challenges faced by those earning below \$42,000 annually (200% of the FPL for a household of two). The Board discussed the importance of equitable language, suggesting terms like "scholarship" or "grant" to reduce stigma. The proposal will undergo fiscal and equity analyses before returning for a first reading. The Board expressed general support, emphasizing the need for inclusivity and understanding of diverse financial situations among members.

Discussion of Requests to file and Amicus Brief in Perkins Coie Case ([link](#))

General Counsel Laurie Powers provided background on requests for WSBA to file an amicus brief in *Perkins Coie LLP v. U.S. Department of Justice*. The case involves significant issues affecting the legal profession in Washington State. The Board debated whether to file at the trial or appellate level, with consensus leaning toward the appellate level for greater impact. Gov. Kari Petrusek moved to authorize the Executive Committee to prepare an amicus brief for the appellate level. The motion was seconded and passed unanimously. The Board also decided to redact and release a confidential memo that was provided to the Board in preparation for the discussion to ensure transparency while maintaining confidentiality of privileged information.

Governor Roundtable ([link](#))

Chief Communication Officer Sara Niegowski gave an update on the Rule of Law Ambassador Program, emphasizing its role in promoting education and confidence in the legal profession. The program aims to launch on Law Day, May 1, with public events and a toolkit for ambassadors. Gov. Parvin Price proposed educational presentations on the U.S. Constitution for the Board and bar members, aligning with the ambassador program. Gov. Mary Rathbone raised concerns about the implementation of indigent defense standards, highlighting potential challenges in meeting attorney requirements in Grant County. The Board acknowledged the need for solutions and discussed forming an implementation committee.

Executive Session: Receive and Discuss Legal Advice ([link](#))

President Anjilvel moved the Board to executive session at 1:25 p.m. to receive and discuss legal advice. The session concluded at 2:30 p.m., and the Board resumed the public session.

Gov. Couch moved to approve a recommendation 1A for a statement titled "Lawful and Necessary," affirming WSBA's commitment to promoting the rule of law and diversify the profession. The motion passed unanimously. Govs. Fay and Widney were not present for the vote.

Gov. Couch moved to approve a recommendation 1B of WSBA's guiding principle which includes core values that inform strategic goals and decision making. Motion passed unanimously. Govs. Fay and Widney were not present for the vote.

Gov. Couch moved to approve WSBA Board of Governors sign on in support of ABA rule of Law statement. Motion passed unanimously. Govs. Fay and Widney were not present for the vote.

During the public session, the Board of Governors discussed several recommendations from confidential materials. Nancy Hawkins expressed concern about a lack of transparency with respect to items taken up in Executive Session and Executive Director Nevitt responded.

Adjournment

There being no further business, President Anjilvel adjourned the meeting at 3:10 p.m. on Saturday, March 22, 2025.

Respectfully submitted,

Terra Nevitt
WSBA Executive Director & Secretary



Board of Governors Meeting – Motions List
Olympia, WA
March 21-22, 2025

3. Motion to approve the Consent Calendar. Motion passed unanimously.
4. Motion to approve the governance committee charter as presented. Motion passed unanimously. Gov. Alain Villeneuve was not present for the vote.
5. Motion to authorize the Executive Committee to prepare an amicus brief for the appellate level in the Perkins Coie case. Motion passed unanimously.
6. Motion to approve Recommendation 1A for a statement titled “Lawful and Necessary,” affirming WSBA’s commitment to promoting the rule of law and diversifying the profession. Motion passed unanimously. Govs. Fay and Widney were not present for the vote.
7. Motion to approve Recommendation 1B of WSBA’s guiding principle, which includes core values that inform strategic goals and decision making. Motion passed unanimously. Govs. Fay and Widney were not present for the vote.
8. Motion to approve WSBA Board of Governors sign-on in support of the ABA Rule of Law statement. Motion passed unanimously. Govs. Fay and Widney were not present for the vote.

TO: WSBA Board of Governors
CC: Terra Nevitt, Executive Director
FROM: Bailey Zydek, Juvenile Law Section Chair
DATE: March 21, 2025
RE: Amending Juvenile Law Section Bylaws

ACTION: The Juvenile Law Section is requesting that its bylaws be amended so that executive committee terms run from 1 year to 2 years, with co-chaired positions alternating the years in which co-chair positions are up for election. These proposed amendments also “clean up” scrivener’s errors that were missed that last time the bylaws were edited (e.g., consistency in capitalization, consistency in the use of the term “chair”).

Every executive committee (E.C.) position of the Juvenile Law Section currently runs on one-year terms. Additionally, all E.C. committees contemplate 2 co-chairs, which means every year the section is scrambling to find 2 people to fill vacant committee positions. The section has struggled to recruit interested applicants, so many positions are filled by appointment (with many more remaining vacant). Executive Committee members often complain that the section spends inordinate amounts of time working to fill positions and managing an annual election cycle. This, combined with the annual turnover of E.C. members and chronic vacancies means the section has not been able to devote sufficient attention to other section objectives. Having E.C. positions that run for two-year terms, with co-chaired committees staggering the years in which the co-chair positions are up for election, would promote continuity within the section and allow the section to devote its time and energy to other projects and objectives.

To transition from one-year terms to two-year staggered terms for the committee co-chairs and at-large members, the following positions will only have a one-year term for FY2026, transitioning to two-year terms in FY27 and going forward:

- a. Co-Chair of Juvenile Justice Committee (Position 2 of 2)
- b. Co-Chair of Dependency and Child Welfare Committee (Position 2 of 2)
- c. Co-Chair of the Civil Legal Needs Committee (Position 2 of 2)
- d. Co-Chair of the Legislative Committee (Position 2 of 2)
- e. CLE Coordinator/Publication Editor
- f. One of two At-Large members (Position 2 of 2)

Background

I do not believe this request has ever come before the Board before, at least not from the Juvenile Law Section. We understand that other sections have their E.C. terms run for 2 years so believe there is a precedent among other sections. E.C. members jumped at this proposal when it was presented during a regular E.C. meeting and members have been eager to push this forward so that the bylaws may be in effect for the current election cycle. The E.C. approved a vote to amend these bylaws during a regularly scheduled section meeting on March 19, 2025.

Community Input

The E.C. has discussed this proposal at length during open section meetings where anyone in attendance had the opportunity to weigh in. We cannot identify any group who would be disadvantaged by extending term limits from 1 to 2 years and so have not engaged in additional community outreach.

Information for Fiscal Analysis

There should not be a fiscal impact associated with extending term limits from 1 to 2 years.

Information for Equity Analysis

Because this proposal strictly concerns amending the Juvenile Law Section's bylaws so that Executive Committee positions run on staggered two-year terms, no particular identity, institution, or group should be impacted. If anything, reducing turnover in the section and freeing up resources so the section may focus on section objectives other than filling vacant positions and managing elections would increase the section's ability to engage in activities that promote equity in juvenile law systems.

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

Risk analysis submitted as part of confidential materials.

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 recommendation is primarily limited to the amount of staff time used to incorporate any approved bylaw revisions to relevant 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: This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.

The equity impacts of this proposal appear consistent with the considerations outlined in the memo. There do not appear to be any direct identity-based impacts of this bylaws change, though by reducing turnover and administrative burdens associated with annual elections, the section will be able to dedicate more time and resources to substantive juvenile law issues.

Attachments

JuvenileLawSectionProposedBylawsAmendments_2025_Clean.pdf

JuvenileLawSectionProposedBylawsAmendments_2025_Redlined.pdf

WASHINGTON STATE BAR ASSOCIATION

JUVENILE LAW SECTION

Bylaws

As last amended and approved by the
Washington State Bar Association Board of Governors
on September 22, 2022.

ARTICLE 1 – GENERAL PROVISIONS

1.1 Section Name

The name of this section is the Juvenile Law Section (the “Section”) of the Washington State Bar Association. This Section was established pursuant to the Bylaws of the Washington State Bar Association (the “Bar”).

1.2 Purpose

The Section will provide a forum to discuss issues of concern and act as an agent of change to improve the law and practice related to civil and criminal matters involving children and youth in Washington State. This Section welcomes advocates from all interested disciplines and a variety of fields of law, including juvenile justice, child welfare and those who represent youth in civil legal practice.

The Section is concerned with all aspects of juvenile law and policy: dependency, offender, civil legal needs of youth and status offenses (children in need of services, youth at risk, and truant).

1.3 Principal Office

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

1.4 Fiscal Year

The fiscal year of the Section shall coincide with that of the Bar, October 1 through September 30.

1.5 Section Subject to WSBA Bylaws

In accordance with WSBA Bylaws Article XI.E, the section is subject to all Bar Bylaws, policies, and procedures.

ARTICLE 2 – MEMBERSHIP

2.1 Enrollment and Membership

Any Active member in good standing with the Bar may be enrolled as a voting member of the Section upon request and payment of annual section dues. In addition, juvenile advocates who are not licensed

to practice law and law students may join as non-voting members (“subscribers”) of the Section. Members enrolled as provided in this article shall constitute the membership of the Section.

2.2 Dues

Dues shall be paid annually in advance. Any person who fails to pay the annual dues shall cease to be a member of the Section. The section dues of law student members of the Executive Committee will be paid by the section during their tenure on the Executive Committee.

ARTICLE 3 – MEETINGS OF THE MEMBERSHIP

3.1 Annual Meeting

The Section shall hold an annual meeting of the membership.

3.2 Quorum

The voting members of the Section present at any meeting shall constitute a quorum for the transaction of business.

3.3 Controlling Vote

Action of the Section shall be by a majority vote of the voting members present.

3.4 Agenda

Among the business to be transacted at the annual meeting by the membership shall be to solicit members interested in serving as officers for the upcoming March to May election cycle, review the section financials, develop committee and project proposals and introduce any proposed bylaw changes for the upcoming year.

3.5 Robert’s Rules of Order

The rules contained in the current edition of Robert’s Rules of Order Newly Revised shall govern the meetings of the Section in all cases to which they are applicable and in which they are not inconsistent with these bylaws; the WSBA Bylaws, policies, and procedures; and any special rules of order as prescribed by the Washington State Bar Association. A failure to observe proper Robert's Rules of Order will not constitute an automatic default or reversal of action without a unanimous vote by the Executive Committee to void the action.

ARTICLE 4 – THE EXECUTIVE COMMITTEE

4.1 Duties

The Executive Committee shall undertake all duties necessary for the administration of the affairs of the Section including, without limitation, the power and duty to act on behalf of the Section in connection with sponsoring, supporting or opposing legislation; sponsoring and cosponsoring continuing legal education; approving the content of and publishing the Section newsletter; approving the content and maintenance of the Section website; the adoption of budget requests and approval of expenditures that comply with Bar fiscal policies and procedures; and shall perform duties assigned to it by the Board of Governors. The Executive Committee shall have the authority to establish and discontinue committees and subcommittees of the Section.

4.2 Composition

The membership of the Executive Committee is composed of the section’s officers and other positions as

Juvenile Law Section

described below:

- a. Chair;
- b. Chair-elect;
- c. Secretary;
- d. Treasurer;
- e. Two Co-Chairs of Juvenile Justice Committee;
- f. Two Co-Chairs of Dependency and Child Welfare Committee;
- g. Two Co-Chairs of the Civil Legal Needs Committee;
- h. Two Co-Chairs of the Legislative Committee;
- i. CLE Coordinator/Publication Editor;
- j. Immediate Past Chair;
- k. Two At-Large members;
- l. Young Lawyer Liaison; and
- m. At least one law student representative from a Washington law school (term expires upon graduation from law school.) The law student member(s) do not have voting rights.

4.3 Voting Rights

All Executive Committee members have full voting rights, with the exception of any law school representatives.

4.4 Term

The term of each Executive Committee position shall be staggered pursuant to Section 7.4 Term of Office with Executive Committee positions serving two-year terms. Any vacancy filled pursuant to Section 7.3 of these bylaws shall only fill the unexpired two-year term.

4.5 Quorum and Controlling Vote

A majority of the voting members of the Executive Committee shall constitute a quorum. Actions of the Executive Committee shall be determined by a majority vote, once a quorum is established, of the voting members present in person, by telephone or by videoconferencing.

4.6 Meetings

The annual meeting of the Executive Committee shall be held in conjunction with the annual meeting of the Section. Special meetings may be held at the time and place designated by a Chair or a majority of the Executive Committee. Notice of all section meetings will be provided to all members and will be listed on the section's web page.

The Executive Committee will hold a monthly meeting on a schedule that will be developed at the beginning of each calendar year and published on the section's web page.

4.7 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.

4.8 Law Student Participation

The Executive Committee may appoint at least one law student member to the Executive Committee.

ARTICLE 5 – OFFICERS

5.1 Officers

The officers of the Section shall be the Chair, the Chair-Elect, the Secretary, and the Treasurer.

5.2 Chair

- a. The Chair shall preside at all meetings of the Section and shall appoint committee members as needed. The Chair shall have such other powers and perform such duties as usually pertain to this office consistent with WSBA and Section Bylaws.
- b. In the event the Chair anticipates a temporary inability to carry out the Chair's duties, the Chair may designate the Chair-Elect (or another member of the Section if the Chair-Elect is not available), to temporarily act as Chair in the Chair's absence.

5.3 Chair-Elect

Upon the death, resignation, or during the disability of the Chair, or upon his/her refusal to act, the Chair-Elect shall perform the duties of the Chair for the remainder of the Chair's disability and then only during so much of the term as the disability continues. The Chair-Elect shall succeed the outgoing Chair as the Chair for the next term of office.

5.4 Secretary

The Secretary will take minutes at each meeting of the Section and Executive Committee and provide approved minutes to the Bar for publication and record retention. Further, the Secretary will perform any additional duties incident to the office of Secretary as may be assigned by the Chair or the Executive Committee, consistent with the Bar's policies and procedures. The role of Secretary and Treasurer may be held by the same member of the Section if one of the two positions is vacant.

5.5 Treasurer

The Treasurer shall be responsible for maintaining financial records for the Section, communicating with the WSBA and other organizations on financial matters, reporting to the Section on its financial position, shall draft a proposed budget each year for Executive Committee approval and submission to the WSBA for approval, shall review the financial statements to the extent provided by the WSBA for accuracy and provide any corrections to the WSBA, and shall perform such other duties as may be delegated by the Executive Committee. The Treasurer shall work with the WSBA to ensure compliance with fiscal policies and procedures. The role of Secretary and Treasurer may be held by the same member of the Section if one of the two positions is vacant.

ARTICLE 6 – COMMITTEES AND SUBCOMMITTEES

6.1 Juvenile Justice Committee

There shall be a juvenile justice committee composed of Co-Chairs and other members of the section who are willing to serve on the committee.

6.2 Child Welfare Committee

There shall be a child welfare committee composed of Co-Chairs and other members of the section who are willing to serve on the committee.

6.3 Civil Legal Needs Committee

There shall be a civil legal needs committee composed of Co-Chairs and other members of the section who are willing to serve on the committee.

6.4 Legislative Committee

There shall be a legislative committee composed of two Co-Chairs and other members who are willing to serve on the committee.

6.5 Purpose

The purpose of the committees shall be to further the interests of the Section within their particular areas of expertise in coordination with the Chairs and subject to control of the Executive Committee. Subcommittees and task forces, as constituted from time to time by the Executive Committee, shall be filled by appointment by the Section Co-Chairs of a Subcommittee or Project Chair with the consent of the Executive Committee. Committee Co-Chairs are elected by the Section and serve as officers of the Section.

ARTICLE 7 – ELECTIONS AND APPOINTMENTS

7.1 Elections

Nominations and elections will occur within timeframes consistent with WSBA bylaws, subject to the schedule identified in Section 7.4. The Bar will administer the elections by electronic means and certify the results, unless the Section develops its own equivalent electronic election process. In the event of a tie, the winner will be determined by a coin toss.

7.2 Nominations

The Chair shall solicit nominations from the Section membership and appoint a nominating committee of not less than three members of the Section, at least one of whom shall not be a current member of the Executive Committee. The nominating committee shall verify qualifications of nominees and solicit additional nominations when appropriate. All applicants will apply through an electronic application process administered by the Bar. In selecting its nominees, it shall be the responsibility of the nominating committee to bear in mind the need for broad representation on the Executive Committee, based on geography, diversity of practice, special expertise, and other factors of diversity. It shall be the responsibility of the nominating committee to contact each member nominated and verify her or his willingness to accept the nomination, and to generally describe the commitment involved in the position to the nominee. Nothing prevents a Section member from self-nominating. The Executive Committee will also have an alternative process to allow for nominations to occur outside the nominating committee process. The Executive Committee will approve a list of nominees for each open position.

7.3 Vacancy

Vacancy of any position on the Executive Committee shall be filled by appointment by a majority vote of the Executive Committee. When a member is appointed to fill a vacancy in an unexpired term, the member will do so until the next annual election when an individual will be elected to serve the remainder of the vacated term.

7.4 Term of Office

The following Executive Committee positions shall serve two-year terms beginning October 1st on odd numbered years:

- a. Chair
- b. Chair-elect

- c. Secretary
- d. Treasurer
- e. Co-Chair of Juvenile Justice Committee (Position 1 of 2)
- f. Co-Chair of Dependency and Child Welfare Committee (Position 1 of 2)
- g. Co-Chair of the Civil Legal Needs Committee (Position 1 of 2)
- h. Co-Chair of the Legislative Committee (Position 1 of 2)
- i. One of two At-Large members (Position 1 of 2)
- j. Young Lawyer Liaison

The following Executive Committee positions shall serve two-year terms beginning October 1st on even numbered years:

- a. Co-Chair of Juvenile Justice Committee (Position 2 of 2)
- b. Co-Chair of Dependency and Child Welfare Committee (Position 2 of 2)
- c. Co-Chair of the Civil Legal Needs Committee (Position 2 of 2)
- d. Co-Chair of the Legislative Committee (Position 2 of 2)
- e. CLE Coordinator/Publication Editor
- f. One of two At-Large members (Position 2 of 2)

ARTICLE 8 – PUBLICATIONS AND WEBSITE

8.1 Newsletter

There may be published and furnished to members of the Section, and to such other persons or organizations as the Executive Committee may determine, an electronic newsletter published at such intervals as the Executive Committee shall determine.

8.2 Other Publications

The Section may publish a series of programs or other written material to further the objectives of the Section.

8.3 Website

The Executive Committee will provide content to the section's web page subject to Bar review and approval.

ARTICLE 9 – AMENDMENTS

9.1 Amendments

These bylaws may be amended at any annual meeting of the Section by a majority vote of the voting members of the Section present and voting, or at an Executive Committee meeting by a majority vote of the voting Executive Committee members once a quorum is established, provided that no amendment shall become effective until approved by the Board of Governors of the Bar.

Approved by the Bar Board of Governors on June 9, 2006, and as first amended and approved by the Bar Board of Governors on March 7, 2008, and further amended and approved by the Bar Board of Governors on March 5, 2010, and further amended and approved by the Bar Board of Governors on October 28, 2011, and further amended and approved by the Bar Board of Juvenile Law Section

Governors on July 27, 2017, and further amended and approved by the Bar Board of Governors on September 22, 2022.

WASHINGTON STATE BAR ASSOCIATION

JUVENILE LAW SECTION

Bylaws

As last amended and approved by the
Washington State Bar Association Board of Governors
on September 22, 2022.

ARTICLE 1 – GENERAL PROVISIONS

1.1 Section Name

The name of this section is the Juvenile Law Section (the “Section”) of the Washington State Bar Association. This Section was established pursuant to the Bylaws of the Washington State Bar Association (the “Bar”).

1.2 Purpose

The Section will provide a forum to discuss issues of concern and act as an agent of change to improve the law and practice related to civil and criminal matters involving children and youth in Washington State. This Section welcomes advocates from all interested disciplines and a variety of fields of law, including juvenile justice, child welfare and those who represent youth in civil legal practice.

The Section is concerned with all aspects of juvenile law and policy: dependency, offender, civil legal needs of youth and status offenses (children in need of services, youth at risk, and truant).

1.3 Principal Office

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

1.4 Fiscal Year

The fiscal year of the Section shall coincide with that of the Bar, October 1 through September 30.

1.5 Section Subject to WSBA Bylaws

–In accordance with WSBA Bylaws Article XI.E, the section is subject to all Bar Bylaws, policies, and procedures.

ARTICLE 2 – MEMBERSHIP

2.1 Enrollment and Membership

Any Active member in good standing with the Bar may be enrolled as a voting member of the Section upon request and payment of annual section dues. In addition, juvenile advocates who are not licensed

Juvenile Law Section

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to practice law and law students may join as non-voting members (“subscribers”) of the Section. Members enrolled as provided in this article shall constitute the membership of the Section.

2.2 Dues

Dues shall be paid annually in advance. Any person who fails to pay the annual dues shall cease to be a member of the Section. The section dues of law student members of the Executive Committee will be paid by the section during their tenure on the Executive Committee.

ARTICLE 3 – MEETINGS OF THE MEMBERSHIP

3.1 Annual Meeting

The Section shall hold an annual meeting of the membership.

3.2 Quorum

The voting members of the Section present at any meeting shall constitute a quorum for the transaction of business.

3.3 Controlling Vote

Action of the Section shall be by a majority vote of the voting members present.

3.4 Agenda

Among the business to be transacted at the annual meeting by the membership shall be to solicit members interested in serving as officers for the upcoming March to May election cycle, review the section financials, develop committee and project proposals and introduce any proposed by-law changes for the upcoming year.

3.5 Robert’s Rules of Order

The rules contained in the current edition of Robert’s Rules of Order Newly Revised shall govern the meetings of the Section in all cases to which they are applicable and in which they are not inconsistent with these bylaws; the WSBA Bylaws, policies, and procedures; and any special rules of order as prescribed by the Washington State Bar Association. A failure to observe proper Robert’s Rules of Order will not constitute an automatic default or reversal of action without a unanimous vote by the Executive Committee to void the action.

ARTICLE 4 – THE EXECUTIVE COMMITTEE

4.1 Duties

The Executive Committee shall undertake all duties necessary for the administration of the affairs of the Section including, without limitation, the power and duty to act on behalf of the Section in connection with sponsoring, supporting or opposing legislation; sponsoring and cosponsoring continuing legal education; approving the content of and publishing the Section newsletter; approving the content and maintenance of the Section website; the adoption of budget requests and approval of expenditures that comply with Bar fiscal policies and procedures; and shall perform duties assigned to it by the Board of Governors. The Executive Committee shall have the authority to establish and discontinue committees and subcommittees of the Section.

4.2 Composition

The membership of the Executive Committee is comprised-composed of the section’s officers and other Juvenile Law Section

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positions as described below:

- a. Chair;
- b. Chair-elect;
- c. Secretary;
- d. Treasurer;
- e. Two Co-ChairsDirectors of Juvenile Justice-Committee;
- f. Two Co-ChairsDirectors of Dependency and Child Welfare Committee;
- g. Two Co-ChairsDirectors of the Civil Legal Needs Committee;
- h. Two Co-ChairsDirectors of the Legislative Committee;
- i. CLE Coordinator/Publication Editor;
- j. Immediate Past Chair;
- k. Two At-Large members; and
- l. Young Lawyer Liaison; and
- m. At least one law student representative from a Washington law school (term expires upon graduation from law school.) The law student member(s) do not have voting rights.

4.3 Voting Rights

All Executive Committee members have full voting rights, with the exception of any law school representatives.

4.4 Term

~~The term of each position on the executive committee shall be one year and begin on October 1 each year.~~

The term of each Executive Committee position shall be staggered pursuant to Section 7.4 Term of Office with Executive Committee positions serving two-year terms. Any vacancy filled pursuant to Section 7.3 of these bylaws shall only fill the unexpired two-year term.

4.5 Quorum and Controlling Vote

A majority of the voting members of the Executive Committee shall constitute a quorum. Actions of the Executive Committee shall be determined by a majority vote, once a quorum is established, of the voting members present in person, by telephone or by videoconferencing.

4.6 Meetings

The annual meeting of the Executive Committee shall be held in conjunction with the annual meeting of the Section. Special meetings may be held at the time and place designated by a Chair or a majority of the Executive Committee. Notice of all section meetings will be provided to all members and will be listed on the section's web page.
~~listed on the section's web page.~~

The Executive Committee will hold a monthly ~~telephone~~ meeting on a schedule that will be developed at the beginning of each calendar year and published on the section's web page.

4.7 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

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not acting in the best interest of the Section membership.

4.8 Law Student Participation

The ~~E~~xecutive ~~C~~ommittee ~~may~~shall appoint at least one law student member to the ~~E~~xecutive ~~C~~ommittee.

ARTICLE 5 – OFFICERS

5.1 Officers

The officers of the Section shall be the Chair, the Chair-Elect, the Secretary, and the Treasurer.

5.2 Chair

- a. The Chair shall preside at all meetings of the Section and shall appoint committee members as needed. The Chair shall have such other powers and perform such duties as usually pertain to this office consistent with WSBA and Section Bylaws.
- b. In the event the Chair anticipates a temporary inability to carry out the Chair's duties, the Chair may designate the Chair-Elect (or another member of the Section if the Chair-Elect is not available), to temporarily act as Chair in the Chair's absence.

5.3 Chair-Elect

Upon the death, resignation, or during the disability of the Chair, or upon his/her refusal to act, the Chair—~~E~~lect shall perform the duties of the Chair for the remainder of the Chair's disability and then only during so much of the term as the disability continues. The Chair-~~E~~lect shall succeed the outgoing Chair as the Chair for the next term of office.

5.4 Secretary

The Secretary will take minutes at each meeting of the Section and ~~E~~xecutive ~~C~~ommittee and provide approved minutes to the Bar for publication and record retention. Further, the Secretary will perform any additional duties incident to the office of Secretary as may be assigned by the Chair or the ~~E~~xecutive ~~C~~ommittee, consistent with the Bar's policies and procedures. The role of Secretary and Treasurer may be held by the same member of the Section if one of the two positions is vacant.

5.5 Treasurer

The Treasurer shall be responsible for maintaining financial records for the Section, communicating with the WSBA and other organizations on financial matters, reporting to the Section on its financial position, shall draft a proposed budget each year for Executive Committee approval and submission to the WSBA for approval, shall review the financial statements to the extent provided by the WSBA for accuracy and provide any corrections to the WSBA, and shall perform such other duties as may be delegated by the Executive Committee. The Treasurer shall work with the WSBA to ensure compliance with fiscal policies and procedures. The role of Secretary and Treasurer may be held by the same member of the Section if one of the two positions is vacant.

ARTICLE 6 – COMMITTEES AND SUBCOMMITTEES

6.1 Juvenile Justice Committee

There shall be a juvenile justice committee ~~comprised~~composed of Co-~~Chairs~~Directors and other

Juvenile Law Section

members of the section who are willing to serve on the committee.

6.2 Child Welfare Committee

There shall be a child welfare committee composed of Co-Chairs/Directors and other members of the section who are willing to serve on the committee.

6.3 Civil Legal Needs Committee

There shall be a civil legal needs committee composed of Co-Chairs/Directors and other members of the section who are willing to serve on the committee.

6.4 Legislative Committee

There shall be a legislative committee composed of one or two Co-Chairs/Directors and other members who are willing to serve on the committee.

6.5 Purpose

The purpose of the committees shall be to further the interests of the Section within their particular areas of expertise in coordination with the Chairs and subject to control of the Executive Committee. Subcommittees and task forces, as constituted from time to time by the Executive Committee, shall be filled by appointment by the Section Co-Chairs of a Subcommittee or Project Chair with the consent of the Executive Committee. Committee Co-Chairs are elected by the Section and serve as officers of the Section.

ARTICLE 7 – ELECTIONS AND APPOINTMENTS

7.1 Elections

~~7.1 Nominations and elections for open executive committee positions will be held between March and May each year. The Bar will administer the elections by electronic means and certify the results, unless the Section develops its own equivalent electronic election process. In the event of a tie, the winner will be determined by a coin toss.~~

Nominations and elections will occur within timeframes consistent with WSBA bylaws, subject to the schedule identified in Section 7.4. The Bar will administer the elections by electronic means and certify the results, unless the Section develops its own equivalent electronic election process. In the event of a tie, the winner will be determined by a coin toss.

7.2 Nominations

The Chair shall solicit nominations from the Section membership and appoint a nominating committee of not less than three members of the Section, at least one of whom shall not be a current member of the Executive Committee. The nominating committee shall verify qualifications of nominees and solicit additional nominations when appropriate. All applicants will apply through an electronic application process administered by the Bar. In selecting its nominees, it shall be the responsibility of the nominating committee to bear in mind the need for broad representation on the Executive Committee, based on geography, diversity of practice, special expertise, and other factors of diversity. It shall be the responsibility of the nominating committee to contact each member nominated and verify her or his willingness to accept the nomination, and to generally describe the commitment involved in the position to the nominee. Nothing prevents a Section member from self-nominating. The Executive Committee will also have an alternative process to allow for nominations to occur outside the nominating committee process. The Executive Committee will approve a list of nominees for each open

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position.

7.3 Vacancy

Vacancy of any position on the Executive Committee shall be filled by appointment by a majority vote of the Executive Committee. When a member is appointed to fill a vacancy in an unexpired term, the member will do so until the next annual election when an individual will be elected to serve the remainder of the vacated term.

7.4 Term of Office

7.4 All executive committee positions will begin October 1 each year.

The following Executive Committee positions shall serve two-year terms beginning October 1st on odd numbered years:

- a. Chair
- b. Chair-elect
- c. Secretary
- d. Treasurer
- e. Co-Chair of Juvenile Justice Committee (Position 1 of 2)
- f. Co-Chair of Dependency and Child Welfare Committee (Position 1 of 2)
- g. Co-Chair of the Civil Legal Needs Committee (Position 1 of 2)
- h. Co-Chair of the Legislative Committee (Position 1 of 2)
- i. One of two At-Large members (Position 1 of 2)
- j. Young Lawyer Liaison

–The following Executive Committee positions shall serve two-year terms beginning October 1st on even numbered years:

- a. Co-Chair of Juvenile Justice Committee (Position 2 of 2)
- b. Co-Chair of Dependency and Child Welfare Committee (Position 2 of 2)
- c. Co-Chair of the Civil Legal Needs Committee (Position 2 of 2)
- d. Co-Chair of the Legislative Committee (Position 2 of 2)
- e. CLE Coordinator/Publication Editor
- f. One of two At-Large members (Position 2 of 2)

ARTICLE 8 – PUBLICATIONS AND WEBSITE

8.1 Newsletter

There ~~may shall~~ be published and furnished to members of the Section, and to such other persons or organizations as the Executive Committee may determine, an electronic newsletter published at such intervals as the Executive Committee shall determine.

8.2 Other Publications

The Section may publish a series of programs or other written material to further the objectives of the Section.

8.3 Website

The Executive Committee will provide content to the section's web page subject to Bar review and Juvenile Law Section

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approval.

ARTICLE 9 – AMENDMENTS

9.1 Amendments

These bylaws may be amended at any annual meeting of the Section by a majority vote of the voting members of the Section present and voting, or at an Executive Committee meeting by a majority vote of the voting Executive Committee members once a quorum is established, provided that no amendment shall become effective until approved by the Board of Governors of the Bar.

Approved by the Bar Board of Governors on June 9, 2006, and as first amended and approved by the Bar Board of Governors on March 7, 2008, and further amended and approved by the Bar Board of Governors on March 5, 2010, and further amended and approved by the Bar Board of Governors on October 28, 2011, and further amended and approved by the Bar Board of Governors on July 27, 2017, and further amended and approved by the Bar Board of Governors on September 22, 2022.

WASHINGTON STATE BAR ASSOCIATION

TO: WSBA Board of Governors
FROM: Sunitha Anjilvel, WSBA President
RE: 2024-2025 Chair Appointment
DATE: April 9, 2025

Consent: Appointment of the Pro Bono & Public Service Committee Co-Chair

The WSBA has a number of standing committees that are created and authorized by the BOG to study matters relating to the general purposes and business of the Bar which are of a continuous and recurring character. Pursuant to the WSBA Bylaws, IX(B)(1)(c), the President-elect annually selects the Chair or Vice Chair of each committee, with the BOG having the authority to accept or reject that selection. Below is the slate of WSBA committee co-chair for the remainder of 2024-2025 year and the 2025-2026 year.

Committee/Board	Recommended for Appointment
Pro Bono and Public Service Committee	Co-Chair: Evangeline Stratton Term: Upon appointment – 9.30.2026

March 26, 2025

TO: WSBA leadership

RE: WSBA Pro Bono & Public Service Committee – Co Chair position

To Whom It May Concern:

My name is Evangeline Stratton, and I'm a member in good standing of the WSBA. I have been a member of the Pro Bono & Public Service committee for over two years. I am currently in my second, two-year term. I would like to be considered for the open Co-Chair position, alongside Andy Dugan.

Until recently, I was the Senior Managing Attorney at Family Violence Appellate Project Washington. Due to insufficient funding, we had to close our Washington office on January 25, 2025. However, I remain committed to furthering *pro bono publico* service in our state, and to the work of the committee. I've personally engaged in pro bono work since the beginning of my legal career in 2010.

I've enclosed a copy of my resume.

Thank you for your consideration,



Evangeline Stratton, JD (she/her)



WSBA #43038

Evangeline Stratton (she/her)

EDUCATION and MEMBERSHIPS

**William Mitchell College of Law
(Mitchell Hamline)**, St. Paul, MN *Juris*
Doctor, magna cum laude, May 2010

Warren Wilson College, Asheville, NC
Bachelor of Arts Human Studies: Sociology,
May 2001

Seattle University School of Law, Seattle,
WA *Visiting Student*, August 2009-May 2010

Washington State Bar Association
Member, #43038

Minnesota State University, Mankato, MN
Master of Science Gender & Women's
Studies, July 2009
Thesis: *Theorizing an Indigenous
Jurisprudence of Rape*

**King County Bar Association
(Washington)**, Member

PROFESSIONAL

Family Violence Appellate Project, Washington

Senior Managing Attorney, March 2021 to January 2025

- Represent survivors of intimate partner violence and gender-based violence pro bono in civil appeals
- Actively solicit pro bono co-counsel for appellate representations in direct appeals and amicus briefs
- Provide technical assistance on appellate practice to unrepresented litigants, advocates, and attorneys
- Develop Washington program infrastructure
- Legislative and public policy advocacy for survivors in Washington State

JustLead Washington, Leadership Academy

Fellow, Cohort 8, September 2021-April 2022

- Engage in collaborative learning to build leadership skills to work towards equity and justice with low-income and marginalized individuals and communities in Washington State.

Stratton Legal, PLLC, Seattle, WA

Legal Consultant, November 2020 to March 2021

- Advise attorneys on procedure and strategy in domestic violence and family law cases.
- Collaborate with community-based advocacy organizations and legal nonprofits.

Anderson, York & Stratton, PC, Seattle, WA

Partner, June 2016 to October 2020

- Represented low bono clients and survivors of domestic violence in family law, protection orders, administrative, civil, and appellate matters.
- Supervised associate attorneys and staff.
- Led business growth and development.
- Networked with community-based advocacy organizations and legal nonprofits.

Simmons Law Office, Seattle, WA

Attorney/Owner, May 2011 to June 2016

- Represented low bono clients and survivors of domestic violence in family law and protection order matters.
- Managed business growth and development.

Legal Voice, Seattle, WA

Law Clerk; Legal Information & Referral Line, 2010 to 2011

- Conducted legal research and draft memoranda for impact litigation relating to civil litigation and legislation.
- Fielded calls and made referrals on legal issues including family law, housing, discrimination, and domestic violence.

ASSOCIATIONS and WORK GROUPS

Washington State Bar Association, Pro Bono & Public Service Committee

Member, 2022 to present

Access To Justice Board, Delivery of Services Subcommittee, Member, 2021-present

Washington State Supreme Court Gender and Justice Commission, Legislative Crime Victim Services Workgroup

Member, September 2023 to present

Coalition Ending Gender Based Violence, Family Law Workgroup
Member, 2018-Present

Legal Voice, Violence Against Women Workgroup, Member, 2011 to 2020

Washington State Women's Commission Safety Committee,
Volunteer Member, Jan. 2022 – present

Technology Enabled Coercive Control (TECCI),
Member/Judicial Sub-committee, 2019-202

PUBLICATIONS

Publication Co-Author, 2015
“Domestic Violence Manual for Judges, Appendix H, “Abusive Litigation and Domestic Violence Survivors”

Publication Co-Author, 2020 & 2021
“Domestic Violence Protection Order Case Law in Washington State”

PRESENTATIONS

Pierce County Domestic Violence Symposium for Dependency Stakeholders, *Co-Presenter* “Purple Roundtable” (2023)

Washington State Coalition Against Domestic Violence, Annual Conference, *Co-Presenter* “Abusive Litigation 2.0” (2022)

Washington Defenders Association, *Virtual Presenter* “Strengthening Advocacy for Survivors” (2022)

Washington state Superior Court Judges Association, *Virtual Co-Presenter*, “Improving Judicial Response to Unrepresented Litigants” (2022)

Washington State Coalition Against Domestic Violence, Legal Advocacy Series, *Virtual Presenter*, “How to Lay a Record for Appeal” (2021)

Washington State Coalition Against Domestic Violence, Annual Conference, *Virtual Co-Presenter*, “*Family Law Advocacy for Non-Attorneys*” (2021)

Domestic Violence Symposium, Seattle University School of Law, Seattle, WA *Co-Presenter*, “Domestic Violence Protection Orders: 201” (2018)

Domestic Violence Symposium, Seattle University School of Law, Seattle, WA *Co-Presenter*, “Alternative Facts: Cutting Through the Misinformation about Domestic Violence” (2017)

Eastside Legal Assistance Program, CLE series, Seattle, WA *Presenter*, “Parenting Plans” (2017)

Washington State Bar Association, New Lawyers Education Program, Seattle, WA *Co-presenter*, “Domestic Violence Protection Orders” and “Temporary Family Law Orders” (2015)

PRO BONO

[Sexual Violence Law Center](#), Seattle, WA
Board Member, 2019-2024

[Eastside Legal Assistance Program](#),
Bellevue, WA *Board Member*, 2012-2018

[King County Bar Association](#), Seattle, WA
Pro Bono Family Law Clinic, 2012-2013
Pro Bono Attorney/Mentee, 2010 to 2011
Pro Bono Attorney/Mentor, 2019 to 2020

[Kids in Need of Defense \(KIND\)](#), Seattle,
WA *Pro Bono Attorney*, 2010-2011

[Immigrant Families Advocacy Project \(IFAP\)](#) Northwest Immigrant Rights
Project & University of Washington
School of Law, Seattle, WA
Pro Bono Attorney, 2011-2012

WASHINGTON STATE BAR ASSOCIATION

TO: WSBA Board of Governors

FROM: Ling Zhuang, Chair, WSBA Judicial Recommendation Committee; Sanjay Walvekar, Staff Liaison to the Judicial Recommendation Committee

CC: Terra Nevitt, Executive Director

DATE: April 7, 2025

RE: WSBA Judicial Recommendation Committee March 2025 Interviews and Recommendations

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

The WSBA Judicial Recommendation Committee met via Zoom on March 13 and March 27, 2025 for the purpose of conducting interviews with four individuals interested in being considered for 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.

TO: Board of Governors
FROM: Terra Nevitt, Executive Director
Paris Eriksen, Manager of Volunteer Engagement
DATE: April 9, 2025
RE: WSBA President-elect Candidate Interview & Selection Process

ACTION: Elect one candidate to the 2025-2026 President-elect officer position of the Board of Governors, for a one-year term beginning upon the incumbent President-elect becoming President.

This year, the WSBA received one applicant submission for the President-elect officer position on the WSBA Board of Governors; Kari Petrasek, whose candidate materials follow this memo.

Interview Process:

While we recognize there is only one applicant, it is organizational practice for uncontested candidates for president-elect to be interviewed and formally elected by the Board of Governors. To that end, the candidate interview will take place the morning of Friday, May 2. The candidate will be interviewed in public session and permitted fifteen minutes total for self-introduction and to answer questions. Governors may use the pool of interview questions provided but are not limited to these questions and may ask others should time permit.

Voting Process:

Given the hybrid meeting environment, this election will be conducted through an secret electronic ballot. After the interview, Board members will be asked to indicate their choice through the e-ballot. All votes will be secret and made available only to three persons appointed by the President, one of which is the Executive Director. Results will be announced immediately following the election.

Relevant WSBA Bylaws:

D. ELECTIONS BY BOARD OF GOVERNORS

1. Office of President-Elect.

The BOG will elect an Active lawyer member of the Washington State Bar Association to serve as President-elect. The election shall take place during a BOG meeting not later than the 38th week of each fiscal year, and will be by secret written ballot. The President-elect will take office upon the incumbent President-elect becoming President or upon vacancy of the office of President-elect.

If at the time of election, no President-elect in the preceding three years was an individual whose primary place of business was located in Eastern Washington, the President-elect must be an individual whose primary place of business is located in Eastern Washington. For purposes of these Bylaws, "Eastern Washington" is defined as that

area east of the Cascade mountain range generally known as Eastern Washington. In any year where the President-elect must be an individual from Eastern Washington and no qualifying application is received within the timeframe allowed, the President will advise the BOG, and the BOG, at any regular meeting or special meeting called for that purpose, will establish procedures to re-open and extend the application period or otherwise address the issue. Such action by the BOG may include waiver of any geographic limitation for the year in question.

3. Election Procedures

Elections of At Large Governors, President and President-elect elections, and any other elections held by the BOG under these Bylaws, except elections for the position of Treasurer, are conducted as follows:

- a. Notice of the position will be advertised in the Bar's official publication and on the Bar's website no less than 30 days before the filing deadline and must include the closing date and time for filing candidate applications.*
- b. Following expiration of the closing date and time identified, all candidate names will be posted publicly.*
- c. The BOG may appoint a committee to recommend candidates to the BOG from all who have submitted their applications for a position in a timely manner.*
- d. All recommended candidates, or others as determined at the discretion of the BOG, will be interviewed in public session of the BOG's meeting. Candidates who are competing for the same position must not be present for each other's interviews.*
- e. Discussion of the candidates will be in public session but candidates will be asked by the President not to be present.*
- f. Election of candidates will be conducted by secret written ballot.*
- g. If no candidate for a given position receives a majority of the votes cast, the two candidates receiving the highest number of votes will be voted on in a run-off election. In the event of a tie for the second highest vote total, all candidates who are tied will participate in the run-off election along with the candidate who received the most votes. The candidate with the most votes in the run-off will be deemed the winner.*
- h. Ballots will be tallied by three persons designated by the President, one of whom will be the Executive Director.*
- i. Proxy votes are not allowed; however, a Governor who participated in the interview and discussion process by electronic means may cast a vote telephonically via a confidential phone call with the Executive Director and the other persons designated by the President to count the ballots.*
- j. The elected candidate will be announced publicly following the vote. However, the vote count will not be announced and all ballots will be immediately sealed to both the BOG and the public and remain in the custody of the Executive Director for 90 days, when they will be destroyed.*

Attachments:

Pool of Interview Questions

Kari Petrasek, candidate materials



**PETRASEK
LAW**

April 4, 2025

WSBA Board of Governors
Washington State Bar Association
1325 Fourth Avenue, Suite 600
Seattle, WA 98101-2539
barleaders@wsba.org

Re: Letter of Interest to Serve as WSBA President-Elect

My fellow Governors:

I am writing to indicate my interest in serving as the Washington State Bar Association ("WSBA") President-Elect. In 2022, I was elected to be the Governor for District 2 and last year, I was chosen by you to serve as the WSBA Treasurer. In this role and while serving on the Budget & Audit Committee for three years, I have worked closely with all current and former Board of Governors members. I have served in this role and as District 2 Governor responsibly and with honor. Ensuring our profession's integrity and continuing to ensure justice for all is why I am applying to serve as WSBA President-Elect.

As the WSBA Treasurer, I have worked closely with WSBA Director of Finance, Tiffany Lynch, and have reviewed our fiscal policy and most recent audit report in great detail. I have ensured that the Budget & Audit committee has worked prudently, and that we maintain transparency to our members in the actions we have taken, particularly in light of the dues increase and license fee philosophy.

When running for my District 2 position, I told my constituents that we need to keep open lines of communication and keep meetings open to the entire membership in a transparent fashion, keep the organization fiscally responsible, and continue to work on our collaborative and productive relationship with the Supreme Court in ever improving the regulations that govern our practices. As President-Elect, I will do my part to keep the lines of communication open, keep meetings open in a transparent fashion, and continue to work with the Supreme Court in a collaborative way.

Technology is ever changing and so incredibly important to the future of our legal profession, both in terms of how lawyers use AI and other technology ethically as well as accessibility to technology for our members and the public. This is especially true given that there

have been important initiatives, task forces, councils, and committees formed over the past few years.

Member wellbeing and wellness in our profession is also of great concern to me. I will continue to ensure that wellness remains a top priority for WSBA. Getting lawyers to work in rural areas is also of great importance and concern. Finding ways to support our public-sector colleagues who are working multiple positions because their office is short-staffed is critical. Continuing the fantastic work of the STAR council is also of utmost importance.

In the current world we live in, ensuring equity and justice, and protecting the rule of law, and defending every lawyer's right to practice where they want and to represent who they want is of paramount importance; while we can advocate towards those ends, this can only be done hand in hand with maintaining an independent judiciary.

I am appreciative of the dedication and wonderful work that the Diversity, Equity and Inclusion Council has done in creating the Equity and Justice Plan. Rolling out the action items will be very important in the coming years. As someone who is not in King County, I am cognizant of the challenge it is to reach people outside of the King County area. It is of great importance to me to ensure that the programs we create, implement, and/or host are available and relevant for everyone across the State.

I have no doubt that the WSBA will face a myriad of issues related to current issues we know about, as well as new issues still to be determined. I have chaired many boards and committees throughout my career; throughout my time as a leader, I have always been someone who is dependable and dedicated, someone who gets things done and is collaborative, and someone who is very interested in the fiscal health of boards I have served on. It is my sincere belief that I am the best candidate, with a demonstratable track record of fiscal responsibility, giving back to the community, and working successfully to bridge divides.

In summary, I respectfully ask that you vote for me as your next WSBA President-Elect. I will listen to you and am committed to professionalism and principled examination of the issues. It would be a great honor to serve in this important position. Thank you for your consideration.

Very truly yours,

A handwritten signature in black ink, appearing to read "Kari Petrsek", written in a cursive style.

Kari M. Petrsek
District 2 Governor/WSBA Treasurer

KARI PETRASEK
11700 Mukilteo Speedway, Suite 201-1006
Mukilteo, WA 98275
(425) 361-7699
kari@petraseklaw.com

LEGAL EXPERIENCE

Snohomish County Superior Court, Everett, WA

Superior Court Judge and Commissioner Pro Tempore

January 2010 – present

Preside over trials and hearings relating to ITA cases, juvenile offender matters, truancies, at-risk-youth, children in need of services, probation violations, domestic relations, and civil cases. Attend pro tempore trainings when offered.

Petrasek Law, PLLC, Mukilteo, WA

Owner, Attorney

January 2015 – present

Represent clients almost daily in juvenile law matters, including dependency and termination proceedings, and court-appointed Guardian ad Litem cases at Snohomish County Juvenile Court. Represent the Snohomish County Volunteer Guardian ad Litem program in hearings and trials as needed. Appear in Superior Court for various civil litigation hearings and trials, including family law, elder law, and guardianship cases. Meet with clients and draft documents in estate planning cases. Court hearings involve all stages of the case from preliminary/show-cause hearings and discovery conferences, to contested review hearings or motion hearings, and eventually settlement negotiations or trial. Represent clients in arbitrations and mediations.

Carson Law Group, P.S., Everett, WA

Attorney

December 2007 – December 2014

Represented clients almost daily in juvenile law matters, including dependency and termination proceedings, and court-appointed Guardian ad Litem cases at Snohomish County Juvenile Court. Represent the Snohomish County Volunteer Guardian ad Litem program in hearings and trials as needed. Appear in Superior Court for various civil litigation hearings and trials, including family law, guardianships, business law, collection, property, landlord-tenant cases, and domestic violence cases. Represent clients in criminal hearings and trials at District Court and handle estate planning cases. Court hearings involve all stages of the case from preliminary/show-cause hearings and discovery conferences, to contested review hearings or motion hearings, and eventually settlement negotiations or trial. Represent clients in arbitrations and mediations.

Bell & Ingram, P.S., Everett, WA

Associate Attorney

September 2005 – December 2007

Represented clients in juvenile law matters, including dependency and termination proceedings, juvenile offender, and court-appointed Guardian ad Litem cases at Snohomish County Juvenile Court. Appeared in Superior Court for various civil litigation hearings and trials, including family law, business law, collection, property, landlord-tenant cases, and domestic violence cases. Represented clients in criminal hearings at District Court and handled estate planning cases. Court hearings involved all stages of the case from preliminary/show-cause hearings and discovery conferences, to contested review hearings or motion hearings, and eventually settlement negotiations or trial. Represented clients in arbitrations and mediations.

Law Offices of Alayne Spaulding, Everett, WA

Associate Attorney

December 2002 – September 2005

Represented clients (parents and children) in juvenile law matters, including dependency and termination proceedings, juvenile offender, BECCA bill, CHINS, ARY, and court-appointed Guardian ad Litem cases at Snohomish County Juvenile Court. Appeared in Superior Court for

child support contempt hearings and family law matters, including dissolution proceedings, parenting plan modifications, and child support contempt hearings. Represented clients in criminal hearings at District Court. Court hearings involved all stages of the case from preliminary hearings and discovery conferences, to contested review hearings or motion hearings, and eventually settlement negotiations or trial.

PROFESSIONAL MEMBERSHIPS AND SKILLS

WSBA Member, in good standing, November 2002 – present

- WSBA Pro Bono Publico Service Commendation, every year since 2006
- Solo & Small Practice Section, Member 2009 – present
 - Chair, April 2018 – September 2020
 - Chair-Elect, October 2016 – April 2018
 - Executive Committee, 2012 – present
 - Electronic Communications Committee, Chair 2014-2015, Member 2014 – present
 - Solo & Small Firm Conference Steering Committee, 2018 – present
- WSBA Board of Governors, District 2 Governor, October 2022 – present
 - WSBA Treasurer, October 2024 – present
- WSBA Rural Practice Project, November 2020 – March 2021
- WSBA Small Town and Rural Council, Chair, October 2022 – present
 - Education & Outreach Subcommittee, Chair October 2021 – present
- Juvenile Law Section, Member
 - Executive Committee, 2021 – present
- WSBA Delegate to the ABA House of Delegates, September 2010 – August 2016, September 2020 – September 2022
- Mentorship Workgroup, 2014

Washington Young Lawyers Division, member 2002 - 2013

- WYLD President, 2010 - 2011
- WYLD President-Elect, 2009 - 2010
- WYLD Snohomish District Trustee, 2005 - 2009
- WYLD Board of Trustees liaison to WSBA Solo Small Practice Section, 2008 - 2009
- Trial Advocacy Program, Chair: 2008, 2009; Co-Chair: 2010

Washington Women Lawyers, member 2007 - present

- State Board Treasurer, October 2017 – present
- State Board Membership Co-VP, April 2017 – September 2017
- Joint Minority Mentorship Program, Mentor 2020 – present
- Snohomish County Chapter Board member, 2012 – present
- Snohomish County Chapter Treasurer, October 2018 – present
- Snohomish County Chapter Representative to State Board, October 2015 – September 2016
- Joint Minority Mentorship Program, Mentor, 2021 – present

Washington Association for Justice, Eagle Member, 2015 – present

Snohomish County Bar Association, 2002 - present

- Treasurer, January 2021 – January 2024
- President, 2015
- Board Member, 2012 - 2024
- Snohomish Co Superior Court GAL Committee, SCBA Representative, January 2021 – present
- Mentorship Committee Co-Chair, 2012 - 2018

Snohomish County Legal Services

- Serving Our Senior Will Clinic Attorney Recruitment volunteer and participant, 2011 - present
- Board Member January 2006 - December 2012
- Family Law Clinic Volunteer and Direct Representation Attorney

Snohomish County Young Lawyers Division, founding member, 2003-2013

- Trustee 2003-2006, 2007-2009
- President 2006-2007

American Bar Association, member 2002 - present

- ABA At-Large Delegate to the House of Delegates, September 2017 – August 2020, September 2022 – present
- ABA State Membership Chair - Washington, September 2019 – present
- ABA Standing Committee on Membership, September 2023 – present
- ABA Technology & Communications Committee, September 2024 – present
- ABA Standing Committee on Technology & Information Systems, September 2020 – 2023
- ABA Cybersecurity Legal Task Force, September 2021 – August 2024
- ABA Membership Advocate, 2017-2019
- GP|Solo Member 2005 – present
 - Council Member, 2014 – 2020
 - Corporate Sponsorships Committee, Chair, 2017 – 2019; Vice-Chair, 2015 – 2017; Member 2015 - 2020
 - Director of Division 2: Member Benefits, September 2019 – August 2020
 - Director of Division 1: Administration, September 2018 – August 2019
 - Director of Division 4: Practice Setting, September 2017 – August 2018
 - Director of Division 3: Practice Specialty, September 2016 – August 2017
 - Women's Initiative Network, September 2016 – present
 - Technology & Resource Committee, Chair, 2019 – present; Member 2015 - present
 - Programs Board, Co-Chair, 2020 – 2021, member 2021 – present
 - Juvenile Law Committee Chair, September 2013 - 2016; Co-Chair, September 2012 - August 2013, Member since 2010
 - Young Lawyers Committee Member, 2010 – present
 - Young Lawyer Fellow Mentor
 - Membership Board Member, 2011 - 2015
- Judicial Division, Lawyers Conference, 2009 – present
 - Executive Committee Member, September 2022 – present
 - Vice-Chair, September 2024 – present
- American Bar Foundation, Fellow 2015 – present
- Youth at Risk Advisory Commission, September 2016 – 2018
- Children and the Law Committee, 2009 – 2016
- YLD Fellows, Member 2014 – present
- YLD Member Service Team Coordinator, September 2012 - August 2013; member 2009-2010
- YLD District 29 (WA/OR) Representative, 2010-2012
- 2008 National Outstanding Young Lawyer Nominee

Seattle University School of Law 1L Mentorship Program, Mentor 2017 – present

Washington State CASA, member 2003 - present

COMMUNITY ACTIVITIES

Archbishop Murphy High School mock trial coach, 2011 – 2022, 2023 - 2024

Rotary Club of Everett, 2017 – present

- Program Committee Chair, July 2021 – 2024
- Vice President, July 2020 – June 2021, July 2024 – present
- Fellowship Committee Chair, August 2018 – June 2020

Gustavus Adolphus Student Mentoring Program, Mentor, 2019 – present

Gustavus Adolphus College Seattle Alumni Chapter President, 2015 – present

- Diversity, Equity & Inclusion Alumni Board Task Force, 2017-2018

Camp Fire of Snohomish County, Governing Board Member, 2021 – present

Susan G. Komen 3-day, 60-mile Walk for the Cure, 2011 and 2012

Everett Symphony Board Member, 2007



**BURI FUNSTON
MUMFORD FURLONG**

ATTORNEYS AT LAW

PHILIP BURI
PHILIP@BURIFUNSTON.COM

April 7, 2025

Board of Governors
Washington State Bar Association
1325 Fourth Ave., Suite 600
Seattle, WA 98101-2539

RE: Kari Petrasek for Bar President

To the Board of Governors:

I wholeheartedly recommend Kari Petrasek as our next Bar President. Having worked with Kari on local and State Bar matters, I can confirm what you already know – she is the most dedicated, capable person in the room. And she is a genuinely kind person.

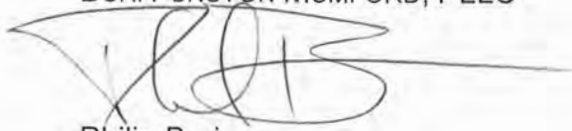
I served on the Board of Governors between 2010 and 2013, witnessing the countless hours the Bar President works behind the scenes. Kari will without question give her all to the job. And with the unprecedented attacks on the rule of law, we will need a Bar President who stands up with courage and tact. Kari is a perfect fit.

Finally, a great Bar President must hold conflicting views (and conflicting Governors) together in meetings that can easily spin out of control. Kari will keep the Board on topic without dominating the conversation or suppressing it. This can be a tricky balance and I know that Kari's experience will serve her well.

Please add my name to the list of Kari's fans. She will be a great Bar President.

Sincerely,

BURI FUNSTON MUMFORD, PLLC



Philip Buri

DICKINSON LAW FIRM, PLLC

**1020 N Washington St. Ste. 3
Spokane WA 99201**

LISA J. DICKINSON*
* Admitted in Washington and Idaho

Phone: (509) 326-0636

lisa@dickinsonlawfirm.com

March 31, 2025

WSBA Board of Governors

Sent via electronic mail only to expedite delivery to: barleaders@wsba.org

RE: Kari Petrasek for President-Elect

Dear Board of Governors:

I write to recommend the nomination of Kari Petrasek for WSBA President-Elect. I have known her and worked with her for many years, since she was active in the YLD. As WSBA President (Elect and also President), the needs of the entire state must be met. I hail from Eastern Washington and am proud to recommend her for this position, as I believe she will always keep the interests of Eastern Washington attorneys in mind, along with rural attorneys as well. I'm sure you are familiar with her work as Chair of the newer Small Town and Rural Practice Council.

Ms. Petrasek, no matter how busy, always gets the job done, shows up, and gets it done to the best of her ability. Despite her busy schedule and bar activities, in my experience, there is no question that she will get everything done above and beyond what is expected of her. I have worked with her extensively on boards and committees, and her work ethic is second to none. Her unwavering dedication to the legal profession shows through in all that she does.

She has held many leadership positions throughout the years, and to my knowledge, she has done good work and made relationships not only statewide but nationally as well. It is important for WSBA to have a voice nationally in the profession, and I have seen her have that seat at the table in her ABA work, serving with her on the House of Delegates, the Standing Committee on Technology and Information Systems, and on many other committees including GP Solo Division work as well.

I have full faith that she will be a great leader for WSBA and I recommend her candidacy without hesitation.

Very truly yours,



LISA J. DICKINSON
LJD/bm



WHATCOM LAW GROUP

A PROFESSIONAL SERVICES CORPORATION

Alejandra Cabrales, MPA, JD
Roger L. Ellingson, JD-*emeritus*
Rajeev D. Majumdar, MAIS, MPA, JD
Casie C. Rodenberger, MSW, JD
Matt Rommelmann, JD

(360) 332-7000
[REDACTED]
(360) 332-6677
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April 6, 2025

Board of Governors
Washington State Bar Association
1325 Fourth Ave., Suite 600
Seattle, WA 98101-2539

RE: Kari Petrasek's Candidacy for WSBA President-Elect

Dear Governors,

I am writing to you in support of Kari Petrasek's candidacy for the office of President-Elect. As a former Governor and as a former WSBA President, I am heavily invested and concerned with our organization having the experienced and calm leadership, that can assist the board in responding to the unexpected and ensuring the agenda of the board is implemented and represented well to the Supreme Court, the Legislature, and the public.

Kari Petrasek is the candidate with the most experience representing our profession, the diligence serving our community, and the demeanor that brings honor to the reputation of lawyers everywhere. In her campaign for governor, she was the only candidate to articulate that **"...for lawyers to be able to serve their communities effectively, they need support, training, and resources."** Values that the WSBA needs to not just foster and implement but also be seen as championing in more than words.

If you have seen Kari's resume, you will note on it that there is more service dedicated to improving the legal profession and the lives of her colleagues than any lawyer I know. And that service is continuous over her 23-year career, whether it be leadership in her local bar, leadership with the ABA, leadership with Washington Women Lawyers, leadership with WSBA Sections, or leadership of the Young Lawyers Division (*etc.*)... Kari has continuously put the time and energy in to better our profession.

But most importantly, she is a person who understands how practice is different out on the periphery and away from the urban centers of King County. She understands that she needs to represent all the members of our great association, to advocate to you to allocate the resources to



289 H Street, Blaine, WA 98230



Whatcom Law Group, P.S.
To: WSBA BoG, *re*: Kari Petrsek
Page 2 of 2

help make our practices easier, and to assist you in holding the WSBA accountable to serving all of its members with the greatest value it can muster.

The WSBA is our organization- and we deserve a chief spokesperson that can speak with lawyers across the state; that is Kari Petrsek.

Thank you for your consideration of these words and your service to the profession. Please feel free to call with any questions or concerns.

Sincerely,

Rajeev D, Majumdar
WSBA# 39753

RDM



Kyle D. Sciuchetti, P.C.
Partner

April 6, 2025

VIA EMAIL

barleaders@wsba.org

Washington State Bar Association
1325 Fourth Ave, Ste 600
Seattle, WA 98101-2539

Subject: Letter of Recommendation in Support of Kari Petrasek for President-Elect of the Washington State Bar Association¹

Dear WSBA Bar Leaders:

I write to endorse Kari Petrasek's candidacy for President-Elect of the Washington State Bar Association. I have been a member of the WSBA for almost thirty years and have gladly volunteered my time to the organization for most of that time. From working and serving with Kari, I know that she is exceptionally qualified and well suited for this leadership role. Having served in this same position for the WSBA in 2020 and 2021, I know that Kari is up for the task.

The President of the WSBA must be thoroughly familiar with the issues facing the organization and the services it provides to its licensees. She must be a good listener, be able to communicate well with attorneys and the public throughout the state and recognize the bar association's powers and limitations. Kari comes to the position well prepared, having served these past few years as the WSBA Governor for District 2 as well as her work as treasurer of the organization and chairing the WSBA's Small Town and Rural Council.

I have had the pleasure of working alongside Kari on the American Bar Association's House of Delegates. Kari has built a strong reputation as an effective leader on the national level and her service to the ABA is unparalleled. Her resume speaks for itself and demonstrates years of work in support of public service making both the state and national bar associations better for it.

The job of President of the WSBA is not easy and the time commitment is enormous. Kari will not shy away from either challenge. She will likely set aside much of the work of her private practice and will throw herself into service for the WSBA with the same energy and dedication

¹ This endorsement by Kyle Sciuchetti does not represent the positions of any other entities, including Miller Nash or the Oregon State Bar.

she applies to all of her volunteer work. She will listen. She will advocate. She will lead the organization toward a better tomorrow for all of us.

Kari has proven herself to be a prudent and insightful leader and steward of the WSBA and I wholeheartedly endorse her as President-Elect of the organization for which I have devoted so many hours of my own time. With Kari as President-Elect, and eventually President of the organization, I know that the WSBA will be in good hands and will continue to thrive and provide the excellent services that the Bar is known for. She will be a great partner to the executive director and staff of the WSBA who does the important work of the Bar. Kari's professional experience, as well as her reputation in the community, leadership, and ability to work with diverse people and groups will serve her well as the spokesperson for the association.

Every day, our bar association and bar associations from across the country face new challenges and obstacles. Kari will work to uphold the rule of law, strive to improve access to justice and protect the autonomy of the judicial branch of government. Kari understands the importance of due process and the work attorneys and judges do as protectors of the constitution and advocates for those who cannot advocate for themselves. Strong leadership has never been more important than it is today. I trust that Kari will rise to the occasion and improve upon the great work that the WSBA has consistently and steadfastly done for almost 100 years.

The membership of the Bar, the public and the WSBA Board of Governors will be well-served and well represented with Kari in the position of WSBA President-Elect. She will work tirelessly for the organization and will make it better. I look forward to seeing what she achieves and her many contributions to the WSBA in the years to come.

Sincerely,

A handwritten signature in blue ink, appearing to read 'K. Sciuchetti', followed by a horizontal line.

Kyle D. Sciuchetti, P.C.

WASHINGTON STATE BAR ASSOCIATION

President-elect Application Form

INSTRUCTIONS

- 1) Complete this application form. If you are nominating someone else, ask them to sign it below and submit it along with the required attachments.
- 2) Attach the following:
 - This complete application form (required)
 - Letter of Interest
 - Resume
 - Letters of Support
- 3) Scan and email the signed form and attachments to barleaders@wsba.org. **Applications must be received by 5 p.m. PST on Tuesday, April 8, 2025. Late materials will not be accepted.**
- 4) Letters of support, if any, can be sent directly to barleaders@wsba.org by the author.
- 5) Applications will be included in the May Board of Governors meeting materials and posted on the WSBA website.

Candidate for President-elect position of the Washington State Bar Association

I, the undersigned active member of the Washington State Bar Association, am running for the President-elect position.

Kari Petrsek

33058

Name of candidate (please print)

WSBA Bar #



Signature of Candidate

Signature of Nominator (if relevant)

WSBA Bar #

Note: By signing this form, the candidate understands and agrees that as part of the election process for this position, the WSBA routinely checks the grievance and discipline files for any records related to candidates. Thus, the candidate waives confidentiality of these materials to WSBA staff and the Board of Governors.

This form must be filed in the Office of the Executive Director of the WSBA no later than 5 p.m. PST on April 8, 2025. Filing may be accomplished by emailing the form and attachment(s) to barleaders@wsba.org.

WASHINGTON STATE BAR ASSOCIATION

Pool of Interview Questions for WSBA President-elect Candidates

April 2025

Background

1. Why do you want to serve in this role?
2. How will you fit Board service into your personal, work, and other commitments?
3. What motivates you as an individual?
4. Please share any prior board leadership experience.

Interest and Commitment

5. What experience(s) do you have related to WSBA's mission?
6. What interests you most about the WSBA?
7. What makes our mission meaningful to you?
8. What three adjectives or short phrases do you think best characterize WSBA?
9. What is your understanding of the role of the WSBA Board of Governors and the role of WSBA President?

Skills and Expertise

10. What qualities make a great WSBA President?
11. What would you suggest your unique contribution to the Board to be?
12. What is the most difficult problem that a board you have been on has had to deal with and what did you learn from that experience?

Current Topics and Member Engagement

13. How could you serve as a link between the organization and the legal community?
14. What initiatives (current or yet to be contemplated) do you think the Board should focus on to help serve the public and the members?
15. As the WSBA considers its structure in light of first amendment challenges, what do you think are the most important considerations?
16. On June 4, 2020, our Washington Supreme Court issued a letter in response to the growing public outcry for social justice and call upon the legal profession to take individual and collective action towards addressing issues of racism in our legal system. In what ways can the WSBA act in response to this call to action?
17. As a board member, what would you do to promote diversity, equity, and inclusion on the Board itself and in the profession as a whole?

Memo

To:	Board of Governors
From:	Raina Wagner and Governor Nam Nguyen, DEI Council Co-Chairs Miryam Gordon and Sharon Sakamoto, DEI Council Members and Co-Chairs of Equity and Justice Plan Workgroup
CC:	Terra Nevitt, Executive Director
Date:	April 10, 2025
Re:	Proposed WSBA Equity and Justice Plan

SECOND READING AND REQUEST FOR APPROVAL: The Diversity, Equity and Inclusion Council is requesting a second read and approval of the proposed 2025 WSBA Equity and Justice Plan.

Background

Over the last two years, the Diversity, Equity and Inclusion Council has been working towards developing a new plan that would replace the 2013 Diversity and Inclusion Plan. As outlined in previously submitted memos (see attached Memos dated December 20, 2024, and February 18, 2025) and previous presentations to the Board of Governors, the new plan is data-driven, informed by a cross-section of members, and stems from WSBA's purpose to regulate the profession and improve the quality of legal services.

Final Proposed Plan

The Diversity, Equity and Inclusion Council has been seeking feedback on its initial draft from members of the Bar, members of the public (communities throughout Washington State), the larger legal community and the Board of Governors since October 2024. We appreciate the questions and feedback that the Board of Governors shared at your last meeting in March. We have made some edits which you can review in the attached redlined version of the new plan.

We believe that this final version of the plan makes it clearer that the goals toward achieving equity and justice are consistent with the purpose of the Bar, are broad enough to encompass a variety of approaches and specific enough to inform implementation strategies. The plan invites all legal professionals to work towards equity and justice for all Washingtonians.

Conclusion

We respectfully ask that you review the newly revised 2025 Equity and Justice Plan for a second reading and approve it.

Attachments

Proposed WSBA Equity and Justice Plan for Second Reading Clean and Redlined Versions

BOG Cover Memo dated December 20, 2024

BOG Cover Memo dated February 18, 2025

2025 WSBA EQUITY AND JUSTICE ACTION PLAN

The Washington State Bar Association recognizes the importance of having a legal profession that reflects the rich tapestry of the communities it serves. All Washingtonians are better off when our State's legal system and legal community are fair and welcoming to everyone. The Washington State Supreme Court, under General Rule 12.2(a)(6)¹ has delegated the responsibility "to promote diversity and equality in the courts and the legal profession" to the Washington State Bar Association.

The Action Plan is informed by data collected in the 2024 Membership Demographic Study which tells us that our profession still has work to do to ensure that our legal community better reflects the public we serve. This Study shows continued marginalization of our underrepresented legal professionals who report that they are less likely to experience positive and satisfying workplace environments. Further, from addressing legal professional shortages in rural areas to increasing the number of legal professionals who understand clients varied lived experiences, legal services are more accessible when the legal profession reflects the communities we serve. The Action Plan's goals are lawful and necessary to affirm WSBA's unwavering commitment to its mission—to serve the public and members, ensure the integrity of the profession, and champion justice.

With its open letter, published in June 2020, our Washington State Supreme Court reaffirmed the responsibility of legal professionals to promote diversity and equity in the courts and legal profession as set forth in GR 12.2(a)(6). In that letter, the Court acknowledged that "our institutions remain affected by the vestiges of slavery," and declared that "the legal community must recognize that we all bear responsibility for this on-going injustice." Citing it as our "moral imperative," the Court unanimously called "on every member of our legal community to reflect....and ask ourselves how we may work together to eradicate racism." Our Action Plan seeks to answer the Court's call, to further WSBA's stated mission, and extend our commitment with an expanded awareness of all barriers that inhibit access to legal services and inclusion in the legal profession.

Our vision of success for the Action Plan is to foster and support a legal system that 1) is committed to ensuring that everyone in our State needing legal services can realistically access those services, and 2) assures everyone in our State interested in entering the legal field has a realistic opportunity to achieve success in our profession.

¹ The Washington Supreme Court adopted amendments to what was then GR 12 in 1997, adding "to promote diversity and equality in the courts and the legal profession."

EQUITY AND JUSTICE ACTION PLAN'S THREE GOALS



GOAL #1: Strengthen the legal profession by building community and fostering belonging.

VISION FOR SUCCESS: The legal profession will more accurately reflect all the various communities we serve, and every legal professional will feel that they belong in the legal community and are able to thrive inclusive of their social identity and background.

STRATEGIES *(in no particular order):*

1. Partner with affinity bar associations; educational institutions from elementary schools, middle school, high schools, community colleges, universities and law schools; underrepresented and/or marginalized communities; and community-based organizations to identify and implement policies and programs that promote inclusion and belonging in the profession.
2. Leverage and improve data collection, analysis, and reporting processes, in order to identify and address actual or potential disparities and inequities in the regulation of the profession, and to better track member attrition from the profession.

3. Equip legal leaders*, including employers and the judiciary, with better tools to meaningfully remove barriers to inclusion and belonging for all legal professionals.
4. Design and implement a process to identify and address gaps in training regarding inclusion and belonging, with a view toward creating accountability.
5. Support opportunities that promote wellness, mentorship, leadership, accessibility and community for all members regardless of their social identity and background.
6. Explore and foster innovative pathways to the profession, including alternatives to bar licensure, and potential regulatory pilot programs designed to open opportunities and increase access to the legal profession.

GOAL #2: Advance a fair, inclusive, effective, and accessible legal system for all people in our State.

VISION FOR SUCCESS: All Washingtonians will have realistic access to high quality and affordable legal services, from legal practitioners who apply an informed perspective of individual circumstances, including an intention to identify and ameliorate the effects of bias.

STRATEGIES *(in no particular order):*

1. Support innovative legal services delivery models that provide more affordable legal services to the most underserved and marginalized communities in our State including people living in rural areas, undocumented communities, people who have limited English proficiency, tribal communities, people with disabilities, and people experiencing poverty, and systemic oppression.
2. Support and implement changes that make WSBA and the legal system more accessible, through continued exploration of the benefits of developing court rules that do not vary from county to county, where technology is uniform and accessible, for both the public and legal professionals.
3. Support policymaking and sustainable, long-term, funding efforts that improve the consistency of quality legal services available to the public.

GOAL #3: Deepen and broaden WSBA leaders'* ongoing commitments to addressing inclusion, belonging and equity issues.

VISION FOR SUCCESS: WSBA leaders* will represent a diversity of social identities, backgrounds, lived experiences and perspectives that demonstrate a culture of inclusion and belonging, and will make decisions that result in fairer outcomes, and increase public trust and confidence in the legal profession.

STRATEGIES *(in no particular order):*

1. Promote participation from all social identities, backgrounds, lived experiences and perspectives within the membership of WSBA entities.
2. Support initiatives that create a welcoming environment so that marginalized communities can express their concerns and ideas and be confident that WSBA leadership* carefully considers their perspectives.
3. Encourage the Board of Governors to regularly collaborate and communicate with affinity bar associations, and facilitate a culture of belonging and inclusion among all WSBA leaders*.
4. Create a process to respond, in a timely and thoughtful way, to inclusion and belonging issues that arise within the legal community and assure that those issues are acknowledged.
5. Collaborate to create policies that enhance equity in the legal system and legal profession.
6. Continue equity education including communication training for WSBA leadership.
7. Identify measures for accountability, work with the Board of Governors to track progress toward meeting the plan's goals, identify challenges and solutions, and draft easy to understand reports.

Achieving the goals set forth in the Action Plan will require a dynamic implementation strategy that will continuously track and measure success and adapt to ensure these goals are reached. This Action Plan will be paired with a more detailed Implementation Plan which will extend our development with a more granular set of practical applications. Acknowledging that there are, often, a variety of solutions, the WSBA will continue to seek input from members of WSBA and the public from across the State on ways we can implement the Action Plan and collectively achieve equity and justice.

With the guidance of our Supreme Court, WSBA invites each of us, as legal professionals, to expand our efforts to undertake this important work, providing equity and justice for all Washingtonians. WSBA believes that every community of Washington State benefits from these efforts when each and every member of the legal profession takes part.

*References to "leaders," or "leaderships," are meant to include – but are not limited to – individual leaders as well as groups of leaders of committees, councils, commissions, sections, boards, local bar associations.

2025-2030 WSBA EQUITY AND JUSTICE ACTION PLAN

The Washington State Bar Association recognizes the importance of having a legal profession that reflects the rich tapestry of the communities it serves. All Washingtonians are better off when our State's legal system and legal community are fair and welcoming to everyone. The Washington State Supreme Court, under General Rule 12.2(a)(6)¹ has delegated the responsibility "to promote diversity and equality in the courts and the legal profession" to the Washington State Bar Association.

The Action Plan is informed by data collected in the 2024 Membership Demographic Study which tells us that our profession still has work to do to ensure that our legal community better reflects the public we serve. This Study shows continued marginalization of our underrepresented legal professionals who report that they are less likely to experience positive and satisfying workplace environments. Further, from addressing legal professional shortages in rural areas to increasing the number of legal professionals who understand clients varied lived experiences, legal services are more accessible when the legal profession reflects the communities we serve. The Action Plan's goals are lawful and necessary to affirm WSBA's unwavering commitment to its mission—to serve the public and members, ensure the integrity of the profession, and champion justice.

With its open letter, published in June 2020, our Washington State Supreme Court reaffirmed the responsibility of legal professionals to promote diversity and equity in the courts and legal profession as set forth in GR 12.2(a)(6). In that letter, the Court acknowledged that "our institutions remain affected by the vestiges of slavery," and declared that "the legal community must recognize that we all bear responsibility for this on-going injustice." Citing it as our "moral imperative," the Court unanimously called "on every member of our legal community to reflect....and ask ourselves how we may work together to eradicate racism." Our Action Plan seeks to answer the Court's call, to further WSBA's stated mission, and extend ~~the~~our commitment with an expanded awareness of all barriers that inhibit access to legal services and inclusion in the legal profession.

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The Washington Supreme Court adopted amendments to what was then GR 12 in 1997, adding "to promote diversity and equality in the courts and the legal profession."

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EQUITY AND JUSTICE ACTION PLAN'S THREE GOALS



GOAL #1: Strengthen the legal profession by building community and fostering belonging.

VISION FOR SUCCESS: The legal profession will more accurately reflect all the various communities we serve, and every legal professional will feel that they belong in the legal community and are able to thrive inclusive of their social identity and background.

STRATEGIES (in no particular order):

1. Partner with affinity bar associations; educational institutions from elementary schools, middle school, high schools, community colleges, universities and law schools; underrepresented and/or marginalized communities; and community-based organizations to identify and implement policies and programs that promote inclusion and belonging in the profession.
2. Leverage and improve data collection, analysis, and reporting processes, in order to identify and address actual or potential disparities and inequities in the regulation of the profession, and to better track member attrition from the profession.
3. Equip legal leaders*, including employers and the judiciary, with better tools to meaningfully remove barriers to inclusion and belonging for all legal professionals.
4. Design and implement a process to identify and address gaps in training regarding inclusion and belonging, with a view toward creating ~~incentives and other mechanisms with a view toward creating~~ accountability.
5. Support opportunities that promote wellness, mentorship, leadership, accessibility and community for all members regardless of their social identity and background.
6. Explore and foster innovative pathways to the profession, including ~~the Law Clerk Program, the Limited License Legal Technicians, Limited Practice Officers,~~ alternatives to bar licensure, and ~~other~~ potential regulatory pilot programs designed to open opportunities and increase access to ~~entry for underserved communities, such as people in rural areas; the legal profession.~~

GOAL #2: Advance a fair, inclusive, effective, and accessible legal system for all people in our State.

VISION FOR SUCCESS: All Washingtonians will have realistic access to high quality and affordable legal services, from legal practitioners who apply an informed perspective of individual circumstances, including an intention to identify and ameliorate the effects of bias.

STRATEGIES (in no particular order):

1. Support innovative legal services delivery models that provide more affordable legal services to the most underserved and marginalized communities in our State including people living in rural areas, undocumented communities, people who have limited English proficiency, tribal communities, people with disabilities, and people experiencing poverty, and systemic oppression.

2. Support and implement changes that make WSBA and the legal system more accessible, through continued exploration of the benefits of developing court rules that do not vary from county to county, where technology is uniform and accessible, for both the public and legal professionals.
3. Support policymaking and sustainable, long-term, funding efforts that improve the consistency of quality legal services available to the public.

GOAL #3: Deepen and broaden WSBA leaderships'* ongoing commitments to addressing inclusion, belonging and equity issues.

VISION FOR SUCCESS: WSBA leaders* will represent a diversity of social identities, backgrounds, lived experiences and perspectives that demonstrate a culture of inclusion and belonging, and will make decisions that result in fairer outcomes, and increase public trust and confidence in the legal profession.

STRATEGIES *(in no particular order):*

1. ~~Expand diversity of~~ Promote participation from all social identities, backgrounds, lived experiences and perspectives within the membership of WSBA entities.
2. Support initiatives that create a welcoming environment so that marginalized communities can express their concerns and ideas and be confident that WSBA leadership* carefully considers their perspectives.
3. Encourage the Board of Governors to regularly collaborate and communicate with affinity bar associations, and facilitate a culture of belonging and inclusion among all WSBA leaders*.
4. Create a process to respond, in a timely and thoughtful way, to inclusion and belonging issues that arise within the legal community and assure that those issues are acknowledged.
5. Collaborate to create policies that enhance equity in the legal system and legal profession.
6. Continue equity education including communication training for WSBA leadership.
7. Identify measures for accountability, work with the Board of Governors to track progress toward meeting the plan's goals, identify challenges and solutions, and draft easy to understand reports.

Achieving the goals set forth in the Action Plan will require a dynamic implementation strategy that will continuously track and measure success and adapt to ensure these goals are reached. This Action Plan will be paired with a more detailed Implementation Plan which will extend our development with a more granular set of practical applications. Acknowledging that there are, often, a variety of solutions, the WSBA will continue to seek input from members of WSBA and the public from across the State on ways we can implement the Action Plan and collectively achieve equity and justice.

With the guidance of our Supreme Court, WSBA invites each of us, as legal professionals, to expand our efforts to undertake this important work, providing equity and justice for all Washingtonians. WSBA believes that ~~the whole~~every community of Washington State benefits from these efforts when each and every member of the legal profession takes part.

*References to “leaders,” or “leaderships,” are meant to include – but are not limited to – individual leaders as well as groups of leaders of committees, councils, commissions, sections, boards, local bar associations.

Memo

To:	Board of Governors
From:	Raina Wagner and Governor Nam Nguyen, DEI Council Co-Chairs Miryam Gordon and Sharon Sakamoto, DEI Council Members and Co-Chairs of Equity and Justice Plan Workgroup
CC:	Terra Nevitt, Executive Director
Date:	February 18, 2025
Re:	Proposed WSBA Equity and Justice Plan

FIRST READING: The DEI Council is requesting a first read of the proposed WSBA Equity and Justice Plan followed by a second reading and approval at the Board of Governor’s May meeting.

Background

With the goal of improving the quality of legal services and the regulation of the legal profession, the WSBA has been engaged in diversity, equity and inclusion work since the 1990s. In 2012, the Bar commissioned a comprehensive [membership demographic study](#) that informed the WSBA’s [Diversity and Inclusion Plan](#), which was approved by the Board of Governors in 2013. That plan set out strategies to educate members of the Bar about diversity and inclusion issues; improve relationships generally with underrepresented members and specifically with affinity bar associations; and improve data collection and commit to commission a comprehensive membership demographic study every 10 years.

In 2023, the Bar began a process to commission a new membership study and retained KGR+C, an independent research consulting firm who did a similar study for the Oregon State Bar. The DEI Council worked closely with the consultant to design a study that would not only help paint a picture of who we are as a legal profession, but also dive deeper, asking about Bar members’ experience in the workplace.

Meanwhile, as the study was underway, the DEI Council began the process to map out a new plan that would refresh the 2013 Diversity and Inclusion Plan. The Council determined that it should incorporate information from the demographic study and also seek broad input across the WSBA and larger legal community about WSBA's work to advance diversity, equity and inclusion. To support the creation of the plan, the Council enlisted the Institute for the Inclusion in the Legal Profession (IILP)—a national

organization that has worked with many bar associations across the country—to gather and assess input about the WSBA’s DEI work and assist with drafting a new plan.

From January to May 2024, IILP conducted 21 focus groups and three individual interviews. This sampling represented a broad cross-section of people, including local and affinity bar association leaders, lawyers from private large and small firms and solo practitioners, corporate and in-house counsel, judges, government and public sector members, law school staff, faculty and students, general members, and members of the public. In June 2024, IILP shared their findings with the DEI Council and made recommendations for what to include in the new plan.

In August 2024, shortly after the DEI Council received IILP’s findings, KGR+C completed the membership demographic study. The findings were shared widely via a [free CLE](#) in August, at the BOG meeting in September 2024, and in the November 2024 issue of the *Bar News*. The DEI Council closely reviewed the findings from the membership demographic study, the IILP report, as well as recommendations the affinity bar associations had submitted to the Board of Governors in 2022, to inform the draft of a new Equity and Justice Plan (“Plan”). The DEI Council’s initial draft Plan laid out three goals: 1) strengthen the legal profession by fostering belonging and building community; 2) advance a fair, inclusive, effective and accessible legal system for all; and 3) deepen and broaden the WSBA leaders’ commitment to equitable decision-making.

The DEI Council sought broad input from October to November and carefully reviewed it in December and January. Throughout this process, the DEI Council reported our progress to the Board of Governors to keep them informed of the developing Plan, along with the initial draft.

To incorporate feedback and improve the plan, the DEI Council made changes to the initial draft and now presents the proposed Equity and Justice Plan to the Board of Governors for a First Reading. We ask the Board of Governors to share your input and suggestions so the DEI Council can improve the plan and bring it back for a Second Reading and approval at your meeting in May.

Why an Equity and Justice Plan?

We are proposing a new Equity and Justice Plan to fulfill the WSBA’s purpose of regulating the legal profession and improving the quality of legal services. Based on that premise, the Plan sets out three goals and underlying strategies that will facilitate the WSBA’s prescribed activities, purposes and objectives outlined in General Rules 12.1 and 12.2, which include but are not limited to:

- Promoting an effective legal system, accessible to all;
- Meaningful access to justice and information about the law, legal issues, and the civil and criminal justice systems;
- Advancement of the administration of justice and the rule of law;
- Delivery of affordable and accessible legal services;
- Promoting an understanding of and respect for our legal system and the law;

- Fostering and maintaining high standards of competence, professionalism and ethics among its members;
- Fostering collegiality among its members and goodwill between the bar and the public;
- Promoting diversity and equality in the courts, the legal profession, and the bar; and
- Diversity and inclusion among legal services providers and freedom from discrimination from those receiving legal services and in the justice system.

We learned from the 2024 Membership Demographic Study and significant input from members through surveys and focus groups that our legal profession's diversity has not increased and does not reflect the broad variety of communities in our state. We also learned that underrepresented members continue to disproportionately experience a lack of inclusion and belonging. Further, we came to understand that access to justice, especially for marginalized members of the public, continues to remain out of reach. The proposed Plan acknowledges the importance of a legal profession that reflects the communities we serve, and that all Washingtonians are better off when our State's legal system and legal profession are fair and welcoming to everyone.

If approved, the Plan can be used as a mechanism to unify the Bar's current equity and justice work already under way, bring the legal profession together to identify ways to create and enhance systemic improvements and track progress towards meeting the three goals. We propose a five-year Equity and Justice Plan so we can create a timeline, track our progress and evaluate and implement needed changes on an ongoing basis.

Applying an Equity Lens and Seeking Community Input

The DEI Council applied an equity lens from the start of our planning process by first identifying the groups who may be impacted by the Plan. We identified that the entire membership – including members who are underrepresented – may be impacted in the effort to improve the profession. We also identified that volunteers and WSBA staff's current work and capacity may be impacted. Finally, we identified that the public and members of the larger community may be impacted in the effort to improve the profession and the legal system.

We engaged with these groups from the beginning by asking the membership demographic study consultant (KGR+C) to include these groups in the design of the study, the survey, and the study's focus groups, and by asking the DEI assessment consultant (IILP) to include all of the groups in the focus groups and interviews. The insights, perspectives and experiences, which were anonymized and aggregated, were considered as we drafted the Plan.

Once the initial draft of the Plan was complete, we designed an outreach plan to solicit feedback and input. We created a stakeholder map where we identified four groups: 1) those who would be most directly impacted, highly invested and with the lowest power; 2) those who would be directly impacted, highly invested and with the highest power; 3) those who would not be very impacted, not very invested, but have high power; and 4) those who are not very impacted and have low investment and low power.

We prioritized those in the first group and regularly engaged with those in the second group. We also worked to keep the third and fourth groups informed.

In early October 2024, the DEI Council shared the draft Plan broadly, seeking input from a variety of people and groups including every WSBA entity; all WSBA members; leaders from affinity bar associations, local bar associations, specialty bar associations, courts, law schools, government agencies and public interest legal organizations; and WSBA staff. DEI Council members and some Board of Governors engaged in personal outreach to organizations they already liaise with. WSBA staff engaged in outreach including personalized communications that followed the broad outreach efforts and presented at a variety of venues such as section executive committee meetings and affinity bar membership meetings. WSBA offered several ways to receive feedback, which included an online survey, email, and virtual drop-in Zoom meetings. In addition, the Board of Governors hosted a dinner with affinity bar leaders, facilitating small group discussions that enabled the DEI Council members and staff to hear and record their input and ideas.

We heard from over 180 people through the online survey, emails, and drop-in virtual sessions and received letters of support from eight organizations and entities. In the online survey, we asked for input on each goal and the strategies outlined for each goal and received over 80 completed surveys. A summary of the feedback themes can be found on the attached BOG cover memo from December 2024.

By and large, the feedback reflected agreement with the Plan's three goals including the focus on equity, accessibility, diversity and belonging. Suggestions for improvement included replacing buzz words with clearer language and outlining more specifics that describe clearer measurable actions.

The proposed draft Equity and Justice Plan we are presenting reflects the edits we made, which incorporates the feedback to use clearer language. As far as identifying how the progress will be monitored, the DEI Council plans to develop an implementation plan following approval of the Equity and Justice Plan.

Fiscal Considerations

The Plan sets out high level goals and strategies. Specific activities and actions like programs and events will be determined when the DEI Council engages in outreach and works towards an implementation plan. To that end, it may be difficult to draft a fiscal analysis at this time. While it may not be possible to forecast a specific dollar figure associated with the Plan, the Board of Governors will have an opportunity to review and determine approval of future annual budgets.

Conclusion

We ask that you review the draft Plan and share your input for what we can do to prepare and present the plan for approval in May.

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

Included in confidential BOG Box materials.

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

As stated above, the fiscal impact of the proposed plan is difficult to assess because the specific activities to implement the plan goals have not been defined. At a minimum, the fiscal impact to WSBA includes staff time used to support the implementation of the plan which is included in the overall duties of existing WSBA staff and would not require additional staff or allocation of resources from other internal sources. Implementation activities such as hosting events, developing programs, and conducting outreach could incur expenses for room rentals, catering, travel reimbursements, consultants, marketing materials, etc. WSBA's FY 2025 budget includes a variety of direct expenses of similar type and varying size, which may help to provide some context for potential cost range. For example, the FY25 WSBA budget includes: \$35,000 to host a two-day Bar Leaders Summit, which will be an in-person only event held at the WSBA office and includes expenses to bring bar leaders in from around the state; a total of \$65,000 for Small Town and Rural Outreach and Activities that include funding for internship programming (\$45,000), a summit (\$12,000), two day of service events rural clinics (\$8,000); and \$500 for Law School Outreach to support a law student panel event and other engagement activities. The cost for implementation activities should be identified annually as part of the WSBA budget approved by the Board of Governors.

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

The purpose of the equity assessments is to understand how entities incorporated an equity lens into the action items presented to the Board of Governors. An equity lens is 1) identifying and centering people and communities most impacted by decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all. The DEI Council outlines above how they applied an equity lens to the drafting of the Plan and their process to solicit input and feedback along the way. The DEI Council articulates its plans to set out ways to track progress and evaluate the Plan's impact. The Plan itself is designed to advance equity.

Attachments

Proposed WSBA Equity and Justice Plan for First Reading

BOG Cover Memo dated December 20, 2024, which provides a summary of feedback

Memo

To:	Board of Governors
From:	Raina Wagner and Governor Nam Nguyen, DEI Council Co-Chairs Miryam Gordon and Sharon Sakamoto, DEI Council Members and Co-Chairs of Equity and Justice Plan Workgroup
Date:	December 20, 2024
Re:	Update on Development of Equity and Justice Plan

UPDATE: The DEI Council will provide an update on the development of the new Equity and Justice Plan.

Background

The WSBA has been engaged in working to make the profession more diverse and inclusive since the 1990s. In 2012, the Bar commissioned a comprehensive [membership demographic study](#) that informed the WSBA's [Diversity and Inclusion Plan](#), which was approved by the Board of Governors in 2013. That plan set out strategies to educate members of the Bar about diversity and inclusion issues; improve relationships generally with underrepresented members and specifically with affinity bar associations; and improve data collection and commit to commission a comprehensive membership demographic study every 10 years.

In 2023, the Bar began a process to commission a new membership study and retained KGR+C, an independent research consulting firm who did a similar study for the Oregon State Bar. The DEI Council worked closely with the consultant to design a study that would not only help reveal a picture of who we are as a legal profession, but also dive deeper, asking about Bar members' experience in the workplace.

Meanwhile, as the study was underway, the DEI Council began the process to map out a new plan that would replace the 2013 Diversity and Inclusion Plan. The Council determined that it should incorporate information from the demographic study, and also seek broad input across the WSBA-verse about WSBA's work to advance diversity, equity and inclusion. To support the creation of the plan, the Council enlisted the Institute for the Inclusion in the Legal Profession (IILP)—a national organization that has worked with many bar associations across the country—to gather and assess input about the WSBA's DEI work and assist with drafting a new plan.

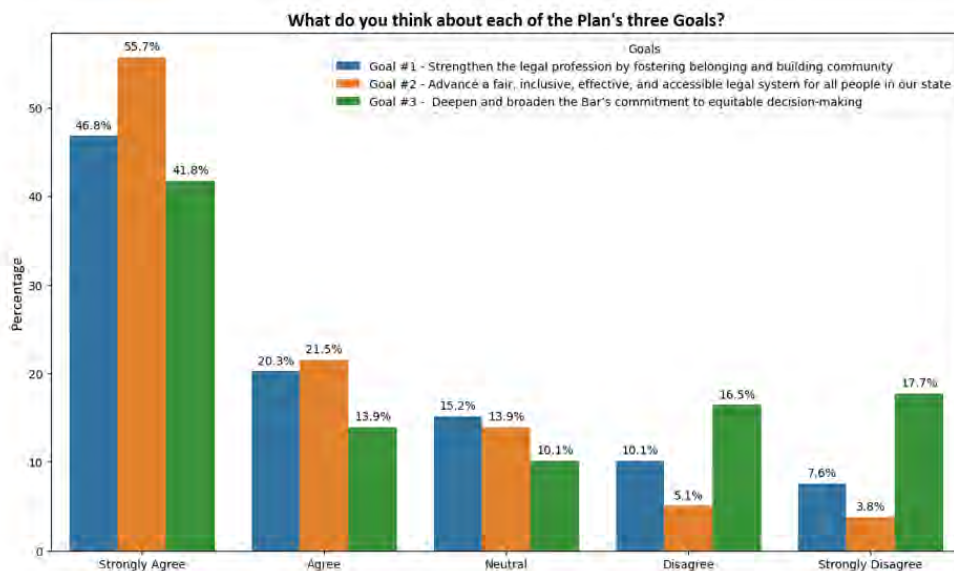
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Shortly after the DEI Council received IILPs findings, in August 2024 KGR+C completed the membership demographic study. The findings were shared widely via a [free CLE](#) in August, at the BOG meeting in September 2024, and in the November 2024 issue of the *Bar News*. The DEI Council closely reviewed the findings from the membership demographic study, the IILP report, as well as recommendations the affinity bar associations submitted to the Board of Governors in 2022, to inform its first draft of a new Equity and Justice Plan (“Plan”). The DEI Council’s draft Plan laid out three goals: 1) strengthen the legal profession by fostering belonging and building community; 2) advance a fair, inclusive, effective and accessible legal system for all; and 3) deepen and broaden the WSBA leaders’ commitment to equitable decision-making.

In early October 2024, the DEI Council shared the draft Plan broadly, seeking input from a variety of people and groups including every WSBA entity: all WSBA members; leaders from affinity bar associations, local bar associations, specialty bar associations, courts, law schools, government agencies and public interest legal organizations; and WSBA staff. DEI Council members and the Board of Governors asked to assist with personal outreach to organizations they already liaise with. WSBA staff engaged in outreach as well, including personalized communications that followed the broad outreach efforts, and presenting at a variety of venues such as section executive committee meetings and affinity bar membership meetings. WSBA offered several ways to receive feedback, which included an online survey, email, and virtual drop-in Zoom meetings. In addition, the Board of Governors hosted a dinner with affinity bar leaders, offering small group discussions that enabled the DEI Council members and staff to hear their input and ideas.

Update on Feedback

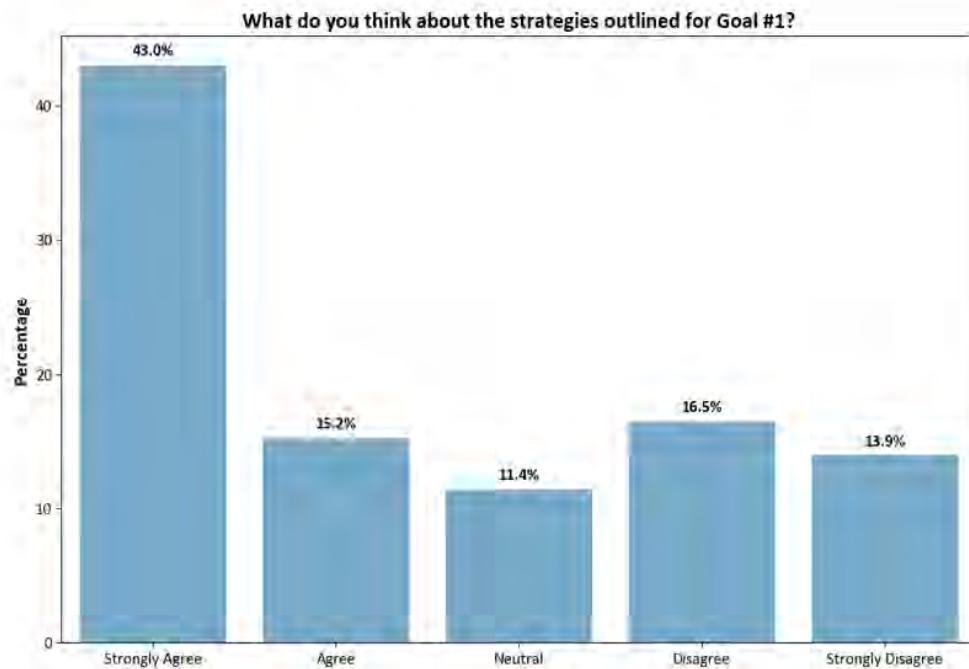
We heard from over 180 people through the online survey, emails, and drop-in virtual sessions and received letters of support from eight organizations and entities. In the online survey, we asked for input on each goal and the strategies outlined for each goal and received over 80 completed surveys. The following summarizes the general feedback on each of the three goals.



The strategies for Goal #1 (“Strengthen the legal profession by fostering belonging and building community”) include:

- Partner with affinity bar associations, underrepresented communities and organizations working to make the legal profession more reflective of the public we serve and accessible to all communities, particularly those who are underserved.
- Leverage and improve data collection, analysis and reporting to learn from the data, identify inequities, ease entry and acceptance into the profession and reduce and eliminate disparities in the delivery of legal services.
- Equip legal leaders including employers and the judiciary to meaningfully remove barriers to inclusion and belonging for legal professionals regardless of their social identity and background.
- Support opportunities that promote wellness, mentorship, leadership, accessibility and community for all members regardless of their social identity and background.
- Explore and support innovative pathways to the profession.

The following summarizes input on Goal #1’s strategies:

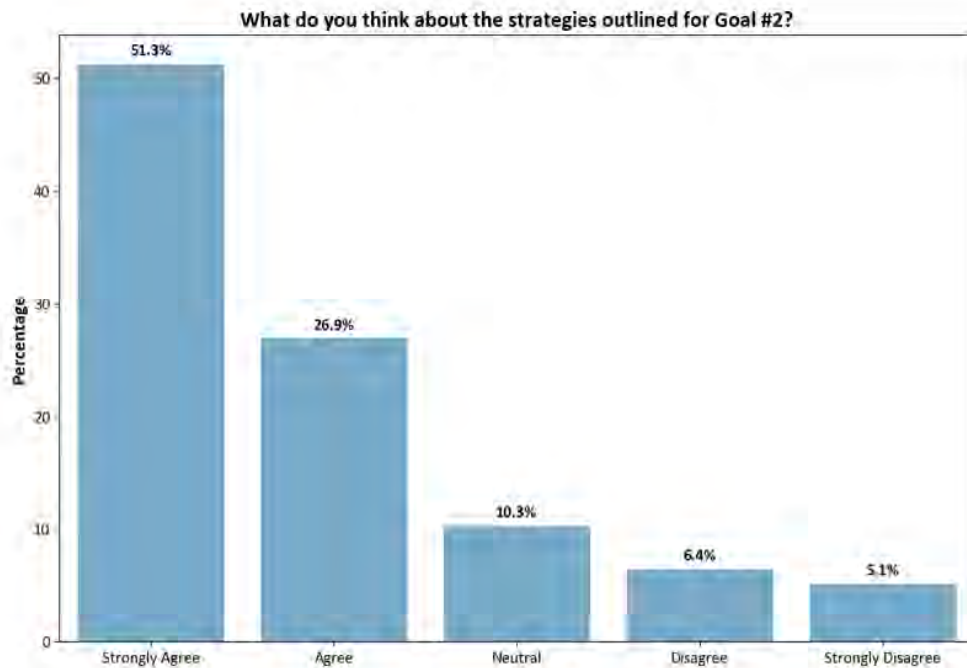


The strategies for Goal #2 (“Advance a fair, inclusive, effective, and accessible legal system for all people in our state”) include:

- Support innovative legal services delivery models that provide more affordable legal services to the most underserved and marginalized communities in our state.
- Implement changes that make WSBA more accessible for people with disabilities and people with limited English proficiency.

- Equip Bar members and other legal practitioners with knowledge and tools to improve the quality of legal services for all including underserved and marginalized communities.
- Support policymaking efforts that address a lack of quality legal services.

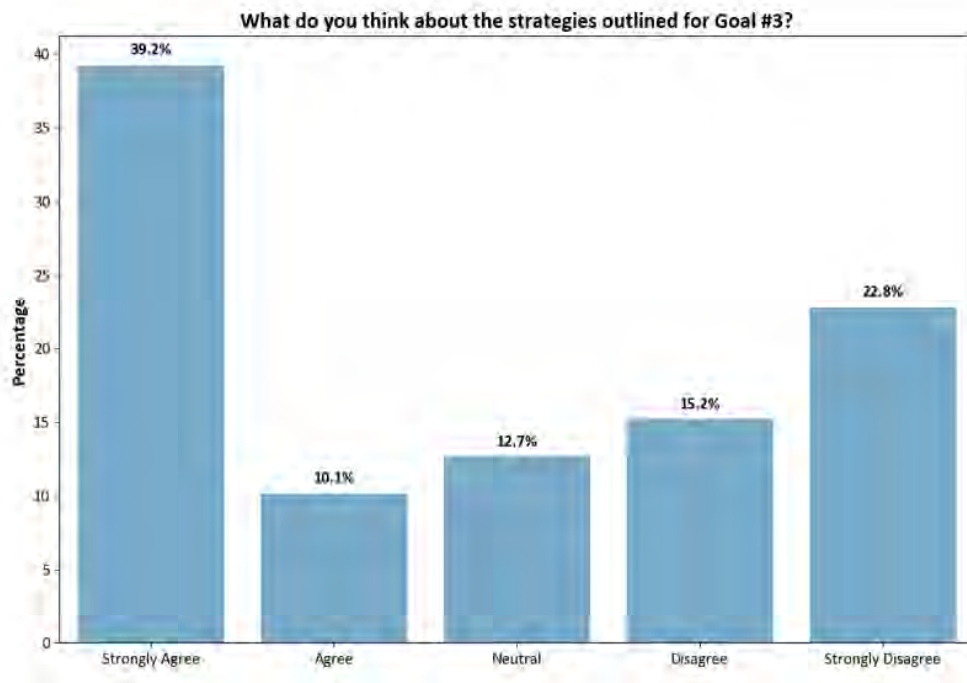
The following summarizes input on Goal #2's strategies:



The strategies for Goal #3 (“Deepen and broaden the Bar’s commitment to equitable decision-making”) include:

- Authentically engage the public by moving from informing and consulting to involving and collaborating.
- Equip Bar leaders and volunteers to apply an equity lens to their work so equitable decision-making is advanced.
- Facilitate a culture of belonging and inclusion among all Bar entities.
- Create and share accessible and digestible reports on progress on equitable decision-and policymaking.

The following summarizes input on Goal #3's strategies:



The themes from the all the feedback and input can be summarized below:

Support:

- Agreement that the Plan addresses equity gap and emphasizes public engagement.
- Agreement on equity, accessibility, and diversity and belonging focus.
- Positive reception for pipeline programs and affinity group collaboration.

Concerns:

- Language is vague or there are too many “buzz” words.
- Need clearer, measurable actions.
- Need to get perspectives from members throughout the state including areas outside of the I-5 corridor.

Suggestions:

- Add measurable benchmarks, timelines, and review mechanisms for transparency.
- Expand DEI training for judges, employers, and law students.
- Enhance legal service accessibility for underserved and middle-income clients.
- Expand pipeline programs to law schools and high schools.
- Expand resources for underserved communities.
- Emphasize focus on underserved communities like rural areas without legal resources (legal deserts), limited English-speaking people and pro se litigants.

- Address bias and lack of inclusion in law school and beyond (e.g., “good ol’ boys’ club” culture).
- Reform systems to tackle racism and bias in courts.
- Create ombudsman programs for reporting bias.
- Develop partnerships with law schools for diverse talent pipelines.
- Allocate more resources to affinity groups for goal implementation.

Next Steps

Because we received a significant amount of rich feedback and input, including suggestions to provide more detailed strategies and measures for success, the DEI Council has decided to take the time needed to meaningfully consider the feedback to inform the draft plan we ultimately will present to the Board of Governors. We are planning to present the draft Equity and Justice Plan as a first reading at the BOG meeting in March.

Attachments:

Initial draft Equity and Justice Plan which was sent out for input and feedback

WASHINGTON STATE BAR ASSOCIATION

To: Board of Governors

From: Budget and Audit Committee

Re: FY 2025 Reforecast Budgets

Date: April 14, 2025

ACTION: Approve the FY 2024 Budget Reforecast.

BACKGROUND

WSBA Fiscal Policies and Procedures provide two options for implementing budget adjustments: reallocation and reforecasting. Budget reallocations that do not impact the bottom line of the budget can happen at any time during the fiscal year. Reallocations are primarily approved by the Executive Director (given dollar amount limits outlined in the policy). This process has been used routinely since it was implemented at the beginning of FY 2023. A budget reforecast is used when needed, typically once in the middle of the year, and is geared towards amending the budget to account for unanticipated events that require more significant changes to the budget and changes the bottom line, typically due to changes in operational needs.

FY 2025 REFORECAST

For FY 2025, we identified changes outlined below that warrant using the reforecast process, including the additional use of Facilities and Special Projects and Innovation fund reserves. The Budget and Audit Committee reviewed and FY 2025 Budget Reforecast at their meeting on April 14, 2025 and voted unanimously to recommend that the Board of Governors approve the FY 2025 Budget Reforecast.

BUDGET COMPARISON: BUDGET vs REFORECAST

ALL FUNDS BUDGET	BUDGET	REFORECAST	Difference
REVENUE	\$26,441,960	\$26,416,840	(\$25,120)
EXPENSE	\$27,991,320	\$28,250,284	+\$258,964
<i>Direct Expense</i>	\$5,105,545	\$5,109,934	+\$4,389
<i>Indirect Expense</i>	\$22,885,776	\$23,140,350	+\$254,574
NET INCOME/(LOSS)	(\$1,549,360)	(\$1,833,444)	+\$284,084¹
Use of Facilities Reserve	\$117,837	\$181,993	+\$64,156
Use of Special Projects & Innovation Reserve	\$199,962	\$319,028	+\$119,066
NET INCOME/(LOSS) w/use of Facilities Reserve	(\$1,231,561)	(\$1,332,423)	+\$100,862¹

The reforecast includes increases in the use of both Facilities and Special Projects and Innovation Fund reserves. Funds that went unspent in FY24 for the WSBA office downsizing project were rolled over and

¹ A positive number indicates an increase in the net loss amount from Budget to Reforecast.

included in the reforecast budget, resulting in an increase from the original FY25 budgeted use of Facilities reserves. The amount estimated for Special Projects and Innovation reserve use in FY25 was based on costs for the Pathways to Practice project; however, the total amount available in the reserve fund (\$400,000 starting FY25) was earmarked for the Pilot Project for Entity Regulation (in addition to the Pathways project). At the time the FY25 Budget was developed, we did not have enough information about the Entity Regulation project to estimate the budget allocation. Now that we are further along into the fiscal year and project work is underway, we are able to include estimates for this work in the reforecast.

(1) GENERAL FUND

The General Fund captures the majority of WSBA's work, including regulatory functions and most services to members and the public. License fees are the primary source of revenue that support the 39 cost centers within the General Fund. The majority of changes for the reforecast are captured in the General Fund. (See *attachment A for General Fund detailed cost center budgets.*)

General Fund Budget	BUDGET	REFORECAST	Difference
▪ Revenue	\$23,111,227	\$23,266,107	+\$154,880
▪ Expenses	\$24,572,042	\$24,813,982	+\$241,940
▪ Net Income/(Loss)	(\$1,460,815)	(\$1,547,875)	+\$87,060
▪ Use of Facilities Reserves	\$109,065	\$169,206	+\$60,141
▪ Use of Special Projects & Innovation Reserves	\$199,962	\$319,028	+\$119,066
▪ NET INCOME/(LOSS) w/use of Facilities Reserve	(\$1,151,788)	(\$1,059,641)	(\$92,147)²

(2) CLE FUND

The CLE Fund Budget consists of three cost centers: (1) CLE Products; (2) CLE Seminars; and (3) Deskbooks. The CLE fund has changes to revenue and indirect expenses in the reforecast budget. (See *attachment B for CLE Fund detailed cost center budgets.*)

CLE Fund Budget	BUDGET	REFORECAST	Difference
▪ Revenue	\$1,754,710	\$1,574,710	(\$180,000)
▪ Expenses	\$1,689,709	\$1,704,825	+\$15,116
▪ Net Income/(Loss)	\$65,001	(\$130,115)	(\$195,116)
▪ Use of Facilities Reserves	\$7,789	\$11,269	+\$3,480
▪ NET INCOME/(LOSS) w/use of Facilities Reserve	\$72,790	(\$118,846)	(\$191,636)

(3) CLIENT PROTECTION FUND (CPF)

The Client Protection Fund (CPF) is a legally restricted fund created in 1995 by the Washington Supreme Court and WSBA to make gifts to compensate those financially victimized by lawyer dishonesty or failure to account for client funds or property. It is principally funded by an annual assessment on all active members and *pro hac vice* admissions as required by the Washington Supreme Court. The CPF fund has minor changes to indirect expenses in the reforecast budget. (See *attachment C for Client Protection Fund detailed cost center budget.*)

Client Protection Fund Budget	BUDGET	REFORECAST	Difference
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² A negative number indicates a decrease in the net loss amount from Budget to Reforecast.

▪ Revenue	\$930,540	\$930,540	\$0
▪ Expenses	\$689,364	\$691,271	+\$1,907
▪ Net Income/(Loss)	\$241,176	\$239,269	(\$1,907)
▪ Use of Facilities Reserves	\$983	\$1,518	+\$535
▪ NET INCOME/(LOSS) w/use of Facilities Reserve	\$242,159	\$240,787	(\$1,372)

(4) SECTIONS FUND

The reforecast does not include any changes to Sections budgets.

(5) CAPITAL BUDGET

The capital budget includes items determined to provide value to the organization beyond one year and have a value greater than \$2,500. The types of items WSBA capitalizes usually includes computer hardware, capital labor development of software, equipment, and leasehold improvements. The capital budget has minor changes related to security upgrades in the reforecast budget. *(See attachment D for the Capital Budget.)*

REFORECAST CHANGES

Provided below is a narrative list of the changes between the FY 2025 Budget and Reforecast reflected in the summaries above.

Revenue Changes	Budget Impact
GENERAL FUND:	+\$154,880
▪ New Member Product Sales (NME): YTD revenue over budget by \$32K and additional revenue expected from new product release	+\$90,000
▪ Law Clerk Fees (CLERK): YTD revenue tracking ahead of budget with additional revenue expected throughout the remainder of the year	+\$30,000
▪ Pro Hac VICE (LICMR): Increased based on anticipated year-end collection	+\$25,000
▪ Investigation Fees (LICMR): YTD revenue tracking ahead of budget with additional revenue expected throughout the remainder of the year	+\$5,000
▪ Donations & Grants (DIV): Adjusted budget to account for additional in-kind support	+\$2,880
▪ Member Contact Information Fees (LICMR): YTD revenue tracking ahead of budget with additional revenue expected throughout the remainder of the year	+\$2,000
CLE FUND:	(\$180,000)
▪ Seminar Registrations (CLES): reduced to reflect changing customer product preference	(\$100,000)
▪ Digital Video Sales (CLEP): reduced to reflect lower actual sales in Q1	(\$80,000)
Total Decrease in Revenue from original FY 2025 Budget	(\$25,120)

Indirect Expense Changes	Budget Impact
SALARIES:	
▪ Temporary Employees: increased to support (1) scanning of records as part of WSBA space remodel/downsizing and (2) discipline software system upgrade	+\$23,583
BENEFITS:	+2,310
▪ FICA: increase tied to change in temporary employees salaries expense	+\$1,994
▪ Unemployment, L&I, and WA Family Leave Insurance: increase tied to change in temporary employees' salaries expense	+\$316

OTHER INDIRECTS:	+\$228,681
▪ Rent: additional funds for assessed leasehold excise tax	+\$60,000
▪ Furniture, Office Equipment & LH Imp Depreciation: additional items not included in original budget for tenant improvements for WSBA office downsizing, replacement of two copiers, and adjustment to capital budget for security upgrades	+\$47,253
▪ Computer Pooled Expenses: increases for (1) Consulting Services (\$25,000) to assist with completion of discipline software system upgrade and (2) Software Maintenance & Licensing (\$20,000) for additional licenses and applications not originally factored into FY25 budget	+\$45,000
▪ Computer Software Depreciation: added internally developed software project that was determined to be completed at end of FY24, but depreciation was not included in FY25 budget	+\$31,271
▪ Move/Downsizing Expenses: cost for demolition and liquidation of furniture and equipment carried forward from unspent Facilities Reserve funds in FY24	+\$28,208
▪ Records Storage: cost to move offsite storage boxes in house for scanning and destruction of records carried forward from unspent Facilities Reserve funds in FY24	+\$18,849
▪ Online Legal Research: additional subscription and licenses for legal research tools	+\$8,100
▪ Bank Fees: reduced based on anticipated savings to be applied by year-end	(\$10,000)
Total Increase in Indirect Expense from original FY 2025 Budget	+\$254,574

Direct Expense Changes	Budget Impact
GENERAL FUND:	+\$4,389
▪ Consulting Services (RR): expenses to support work on Pilot Project for Entity Regulation, including \$20,000 for application software development and \$10,000 for subject matter expert consultations	+\$30,000
▪ Outreach (RR): expenses to promote and communicate launch of Pilot Project for Entity Regulation	+\$10,000
▪ Postage (BN): increase in postage rate for magazine mailing	+\$14,000
▪ Disability Expenses (DISC): YTD expense tracking ahead of budget and we have had more respondents going through the disability proceedings than expected, so budget is increased to allow for additional capacity	+\$9,500
▪ Consulting Services (LICMR): carry forward of unspent funds for an application development project that was scheduled for completion in FY24 but now is expected to finish in FY25	+\$6,000
▪ Volunteer Recognition (VE): funds for printing of volunteer recognition cards not included in original budget.	+\$2,000
▪ Supplies (ADMISS): additional supplies needed for Bar Exam	+\$2,000
▪ Staff Travel/Parking (PRP): funding for additional outside speaking engagements	+\$1,000
▪ Litigation Expenses (OGC): YTD expense tracking ahead of budget and we expect additional expenses from an ongoing case requiring transcription	+\$800
▪ Postage (LICMR): reduction caused by change in mailing class for licensing notices	(\$13,652)
▪ Depreciation (DISC): eliminated expense due to change in capitalization for discipline software system upgrade	(\$24,259)
▪ Regulatory School (VE): event held in Q1 and actual expenses were much lower than originally budgeted	(\$33,000)

Total Increase in Direct Expenses from original FY 2025 Budget	+\$4,389
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ATTACHMENTS

A	Reforecast FY25 General Fund Budget
B	Reforecast FY25 CLE Budget
C	Reforecast FY25 CPF Budget
D	Reforecast FY25 Capital Budget

ATTACHMENT A

Total Direct Expenses	4,670,791	5,109,934	439,143	9%	3,817,336	1,057,624
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ACCESS TO JUSTICE

Cost Center **FY25 REFORECAST FTE 1.63**
ATJ **FY24 REFORECAST FTE 1.64**

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

TOTAL REVENUE	-	-	-	-	-
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DIRECT EXPENSES:

50100	STAFF TRAVEL/PARKING	2,800	2,800	-	0%	1,588	259
50110	STAFF CONFERENCE & TRAINING	3,300	2,495	(805)	-24%	912	1,530
52121	ATJ BOARD RETREAT	4,000	6,000	2,000	50%	2,718	2,371
52125	LEADERSHIP TRAINING	4,000	6,000	2,000	50%	4,150	1,425
52140	ATJ BOARD EXPENSE	65,000	58,500	(6,500)	-10%	41,683	20,936
52874	PUBLIC DEFENSE	4,000	4,000	-	0%	2,213	2,279
58225	CONFERENCE/INSTITUTE EXPENSE	-	30,000	30,000		(135)	19,167
58450	RECEPTION/FORUM EXPENSE	11,000	30,000	19,000	173%	9,497	5,317
TOTAL DIRECT EXPENSES		94,100	139,795	45,695	49%	62,625	53,285

INDIRECT EXPENSES:

51199	SALARY EXPENSE	145,500	155,733	10,233	7%	138,676	52,714
51299	BENEFITS EXPENSE	52,903	51,565	(1,338)	-3%	48,134	16,805
51900	OTHER INDIRECT EXPENSE	48,317	42,302	(6,015)	-12%	43,699	14,319
TOTAL INDIRECT EXPENSES:		246,721	249,600	2,880	1%	230,509	83,839

TOTAL ALL EXPENSES:	340,821	389,395	48,575	14%	293,135	137,123
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NET INCOME (LOSS):	(340,821)	(389,395)	(48,575)	14%	(293,135)	(137,123)
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ADVANCEMENT FTE
Cost Center **FY25 REFORECAST FTE 1.96**
ADV FTE **FY24 REFORECAST FTE 1.89**

Washington State Bar Association					
Budget Comparison					
FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD

REVENUE:							
TOTAL REVENUE		-	-	-	-	-	-
DIRECT EXPENSES:							
50110	STAFF CONFERENCE & TRAINING	8,424	3,300	(5,124)	-61%	8,846	120
TOTAL DIRECT EXPENSES		8,424	3,300	(5,124)	-61%	8,846	120
INDIRECT EXPENSES:							
51199	SALARY EXPENSE	244,054	264,525	20,471	8%	246,488	86,418
51299	BENEFITS EXPENSE	69,638	74,703	5,065	7%	68,782	23,809
51900	OTHER INDIRECT EXPENSE	55,683	50,098	(5,584)	-10%	50,660	16,706
TOTAL INDIRECT EXPENSES:		369,375	389,327	19,952	5%	365,930	126,932
TOTAL ALL EXPENSES:		377,799	392,627	14,828	4%	374,776	127,052
NET INCOME (LOSS):		(377,799)	(392,627)	(14,828)	4%	(374,776)	(127,052)

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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BAR NEWS
Cost Center
BN

FY25 REFORECAST FTE 2.13
FY24 REFORECAST FTE 2.23

REVENUE:

40900	ROYALTIES	2,500	2,000	(500)	-20%	1,543	-
42710	BNEWS DISPLAY ADVERTISING	400,000	405,000	5,000	1%	418,264	140,525
42720	BNEWS SUBSCRIPT/SINGLE ISSUES	100	100	-	0%	108	72
42730	BNEWS CLASSIFIED ADVERTISING	7,500	2,500	(5,000)	-67%	2,761	1,463
42760	JOB TARGET ADVERSTISING	200,000	180,000	(20,000)	-10%	152,139	27,663
TOTAL REVENUE		610,100	589,600	(20,500)	-3%	574,814	169,723

DIRECT EXPENSES:

50060	POSTAGE	110,000	135,000	25,000	23%	122,543	45,194
50070	PRINTING & COPYING	250,000	262,500	12,500	5%	211,369	71,689
50110	STAFF CONFERENCE & TRAINING	2,500	-	(2,500)	-100%	-	0
50120	STAFF MEMBERSHIP DUES	135	150	15	11%	135	-
50130	SUBSCRIPTIONS	225	225	-	0%	203	204
50155	DIGITAL/ONLINE DEVELOPMENT	2,000	2,000	-	0%	572	-
52710	GRAPHICS/ARTWORK	100	1,000	900	900%	1,103	-
52750	EDITORIAL ADVIS COMMITTEE EXP	-	300	300		20	-
TOTAL DIRECT EXPENSES		364,960	401,175	36,215	10%	335,944	117,088

INDIRECT EXPENSES:

51199	SALARY EXPENSE	213,007	207,867	(5,140)	-2%	213,708	74,137
51299	BENEFITS EXPENSE	69,472	67,753	(1,718)	-2%	70,936	21,462
51900	OTHER INDIRECT EXPENSE	65,700	54,444	(11,256)	-17%	59,554	18,087
TOTAL INDIRECT EXPENSES:		348,179	330,063	(18,115)	-5%	344,199	113,686

TOTAL ALL EXPENSES:		713,139	731,238	18,100	3%	680,143	230,774
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NET INCOME (LOSS):		(103,039)	(141,638)	(38,600)	37%	(105,328)	(61,051)
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BOARD OF GOVERNORS

Cost Center
BOG

FY25 REFORECAST FTE 1.40
FY24 REFORECAST FTE 1.50

Washington State Bar Association					
Budget Comparison					
FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD

REVENUE:

TOTAL REVENUE	-	-	-	-	-	-
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DIRECT EXPENSES:

50100	STAFF TRAVEL/PARKING	-	-	-		(0)	-
50140	SUPPLIES	500	500	-	0%	610	73
52125	LEADERSHIP TRAINING	20,000	15,000	(5,000)	-25%	1,681	-
52810	BOG MEETINGS	190,000	148,000	(42,000)	-22%	164,195	25,436
52820	BOG COMMITTEES' EXPENSES	2,500	2,000	(500)	-20%	18	3,628
52821	BOG RETREAT	35,000	40,000	5,000	14%	30,180	37,745
52822	BOG CONFERENCE ATTENDANCE	60,000	39,500	(20,500)	-34%	55,335	2,583
52830	BOG TRAVEL & OUTREACH	22,000	50,000	28,000	127%	28,413	6,723
52880	BOG ELECTIONS	26,900	42,000	15,100	56%	12,545	-
52960	PRESIDENT'S DINNER	15,000	10,000	(5,000)	-33%	11,129	0
52812	NEW GOVERNOR ORIENTATION	10,000	10,000	-	0%	2,570	-
52823	PRESIDENTS PHOTO	3,300	3,300	-	0%	1,652	-
52891	LONG RANGE STRATEGIC PLANNING COUNCIL	600	-	(600)	-100%	-	-
58150	ATTENDANCE AT BOG MEETINGS	-	-	-		(0)	-
TOTAL DIRECT EXPENSES		385,800	360,300	(25,500)	-7%	308,326	76,189

INDIRECT EXPENSES:

51199	SALARY EXPENSE	104,320	112,836	8,516	8%	103,300	40,628
51299	BENEFITS EXPENSE	38,166	40,463	2,297	6%	30,140	13,856
51900	OTHER INDIRECT EXPENSE	44,193	35,785	(8,408)	-19%	40,219	12,603
TOTAL INDIRECT EXPENSES:		186,679	189,084	2,405	1%	173,659	67,086
TOTAL ALL EXPENSES:		572,479	549,384	(23,095)	-4%	481,985	143,275
NET INCOME (LOSS):		(572,479)	(549,384)	23,095	-4%	(481,985)	(143,275)

CHARACTER & FITNESS BOARD

Cost Center **FY25 REFORECAST FTE 0.75**
CFB **FY24 REFORECAST FTE 0.75**

Washington State Bar Association					
Budget Comparison					
FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD

REVENUE:

TOTAL REVENUE	-	-	-	-	-
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DIRECT EXPENSES:

52235	CHARACTER & FITNESS BOARD EXP	18,000	18,000	-	0%	2,064	3,022
54310	COURT REPORTERS	15,000	15,000	-	0%	687	3,096
TOTAL DIRECT EXPENSES		33,000	33,000	-	0%	2,750	6,118

INDIRECT EXPENSES:

51199	SALARY EXPENSE	93,739	95,315	1,576	2%	95,864	32,070
51299	BENEFITS EXPENSE	30,383	27,582	(2,801)	-9%	28,077	8,957
51900	OTHER INDIRECT EXPENSE	22,096	19,170	(2,926)	-13%	20,109	6,406
TOTAL INDIRECT EXPENSES:		146,219	142,068	(4,152)	-3%	144,050	47,433

TOTAL ALL EXPENSES:	179,219	175,068	(4,152)	-2%	146,800	53,551
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NET INCOME (LOSS):	(179,219)	(175,068)	4,152	-2%	(146,800)	(53,551)
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COMMUNICATION STRATEGIES

Cost Center **FY25 REFORECAST FTI 6.05**
COMM **FY24 REFORECAST FTI 5.20**

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

42570	50 YEAR MEMBER TRIBUTE LUNCH	500	100	(400)	-80%	1,900	-
44100	WSBA LOGO MERCHANDISE SALES	-	500	500		2,414	-
TOTAL REVENUE		500	600	100	20%	4,314	-

DIRECT EXPENSES:

50050	EQUIPMENT, HARDWARE & SOFTWARE	2,500	-	(2,500)	-100%	1	-
50100	STAFF TRAVEL/PARKING	5,895	5,895	-	0%	3,213	715
50110	STAFF CONFERENCE & TRAINING	7,500	11,100	3,600	48%	9,199	8,721
50120	STAFF MEMBERSHIP DUES	1,120	1,800	680	61%	1,164	-
50130	SUBSCRIPTIONS	4,000	4,000	-	0%	2,237	435
52511	BAR LEADERS SUMMIT	-	35,000	35,000		-	-
52570	APEX	50,000	52,500	2,500	5%	47,315	-
52573	50 YEAR MEMBER TRIBUTE LUNCH	30,000	35,000	5,000	17%	25,600	-
52878	COMMUNICATIONS OUTREACH	15,000	15,000	-	0%	3,956	1,456
54027	BAR OUTREACH	18,000	20,000	2,000	11%	6,082	74
TOTAL DIRECT EXPENSES		134,015	180,295	46,280	35%	98,767	11,401

INDIRECT EXPENSES:

51199	SALARY EXPENSE	398,702	465,232	66,531	17%	344,958	112,942
51299	BENEFITS EXPENSE	136,595	170,889	34,294	25%	118,866	46,683
51900	OTHER INDIRECT EXPENSE	153,201	154,640	1,439	1%	139,218	50,160
TOTAL INDIRECT EXPENSES:		688,499	790,762	102,263	15%	603,042	209,785

TOTAL ALL EXPENSES:		822,514	971,057	148,543	18%	701,809	221,186
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NET INCOME (LOSS):		(822,014)	(970,457)	(148,443)	18%	(697,495)	(221,186)
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COMMUNICATION STRATEGIES FTE
Cost Center **FY25 REFORECAST FTE 1.00**
COMM FTE **FY24 REFORECAST FTE 1.00**

Washington State Bar Association					
Budget Comparison					
FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD

REVENUE:

TOTAL REVENUE	-	-	-	-	-
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DIRECT EXPENSES:

TOTAL DIRECT EXPENSES	-	-	-	-	-
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INDIRECT EXPENSES:

51199	SALARY EXPENSE	171,146	179,737	8,591	5%	171,493	60,843
51299	BENEFITS EXPENSE	47,372	45,265	(2,107)	-4%	47,337	14,981
51900	OTHER INDIRECT EXPENSE	29,462	25,560	(3,901)	-13%	26,684	8,541

TOTAL INDIRECT EXPENSES:		247,980	250,562	2,582	1%	245,513	84,365
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NET INCOME (LOSS):		(247,980)	(250,562)	(2,582)	1%	(245,513)	(84,365)
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			Washington State Bar Association					
			Budget Comparison					
DISCIPLINE			FY2024	FY2025	FY24 vs. FY25	% Change	FY2024	FY2025
Cost Center			Reforecast	Reforecast	Comparison		Actuals	Actuals
DISC							YTD	YTD
		FY25 REFORECAST FTI38.90						
		FY24 REFORECAST FTI38.00						
REVENUE:								
	42450	AUDIT REVENUE	1,000	1,000	-	0%	170	43
	44350	RECOVERY OF DISCIPLINE COSTS	100,000	70,000	(30,000)	-30%	54,568	27,297
	44450	DISCIPLINE HISTORY SUMMARY	18,000	19,000	1,000	6%	18,510	6,840
TOTAL REVENUE			119,000	90,000	(29,000)	-24%	73,248	34,180
DIRECT EXPENSES:								
	50015	DEPRECIATION	11,539	-	(11,539)	-100%	-	-
	50080	PUBLICATIONS PRODUCTION	300	350	50	17%	129	-
	50100	STAFF TRAVEL/PARKING	15,000	25,000	10,000	67%	13,800	3,680
	50110	STAFF CONFERENCE & TRAINING	34,627	37,345	2,718	8%	28,498	4,471
	50120	STAFF MEMBERSHIP DUES	7,365	7,090	(275)	-4%	6,418	6,308
	50160	TELEPHONE	4,800	4,000	(800)	-17%	2,740	726
	54310	COURT REPORTERS	60,000	60,000	-	0%	61,666	15,770
	54320	OUTSIDE COUNSEL EXPENSES	1,000	1,000	-	0%	250	-
	54360	LITIGATION EXPENSES	40,000	40,000	-	0%	43,226	3,159
	54370	DISABILITY EXPENSES	9,000	15,000	6,000	67%	7,026	3,649
	54400	TRANSLATION SERVICES	1,000	12,000	11,000	1100%	9,448	983
TOTAL DIRECT EXPENSES			184,630	201,785	17,155	9%	173,200	38,744
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	3,795,327	4,053,832	258,505	7%	3,734,909	1,336,576
	51299	BENEFITS EXPENSE	1,130,160	1,272,455	142,295	13%	1,115,581	408,840
	51900	OTHER INDIRECT EXPENSE	1,119,549	995,577	(123,972)	-11%	1,015,908	332,106
TOTAL INDIRECT EXPENSES:			6,045,036	6,321,864	276,827	5%	5,866,398	2,077,522
TOTAL ALL EXPENSES:			6,229,667	6,523,649	293,982	5%	6,039,598	2,116,266
NET INCOME (LOSS):			(6,110,667)	(6,433,649)	(322,982)	5%	(5,966,350)	(2,082,087)

DIVERSITY
Cost Center
DIV

FY25 REFORECAST FT|2.69
FY24 REFORECAST FT|2.69

Washington State Bar Association					
Budget Comparison					
FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD

REVENUE:

40300	DONATIONS & GRANTS	135,000	135,000	-	0%	135,000	-
TOTAL REVENUE		135,000	135,000	-	0%	135,000	-

DIRECT EXPENSES:

50033	CONSULTING SERVICES	60,550	7,000	(53,550)	-88%	58,775	45
50100	STAFF TRAVEL/PARKING	1,500	3,700	2,200	147%	874	211
50110	STAFF CONFERENCE & TRAINING	2,000	3,000	1,000	50%	2,154	162
50120	STAFF MEMBERSHIP DUES	550	700	150	27%	90	90
50145	SURVEYS	17,500	-	(17,500)	-100%	17,500	-
52680	DEI COUNCIL	3,800	5,900	2,100	55%	3,948	79
52681	DIVERSITY EVENTS & PROJECTS	31,800	43,100	11,300	36%	11,016	3,670
52687	INTERNAL DIVERSITY OUTREACH	-	7,500	7,500		-	-
TOTAL DIRECT EXPENSES		117,700	70,900	(46,800)	-40%	94,356	4,257

INDIRECT EXPENSES:

51199	SALARY EXPENSE	212,559	227,749	15,190	7%	149,846	74,317
51299	BENEFITS EXPENSE	70,525	79,569	9,043	13%	46,796	25,162
51900	OTHER INDIRECT EXPENSE	79,252	68,757	(10,495)	-13%	71,929	22,861
TOTAL INDIRECT EXPENSES:		362,337	376,075	13,738	4%	268,572	122,340

TOTAL ALL EXPENSES:		480,037	446,975	(33,062)	-7%	362,928	126,598
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NET INCOME (LOSS):		(345,037)	(311,975)	33,062	-10%	(227,928)	(126,598)
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FINANCE
Cost Center
FIN

FY25 REFORECAST FTI 6.92
FY24 REFORECAST FTI 6.92

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

40500	INTEREST - INVESTMENTS	650,000	600,000	(50,000)	-8%	929,443	218,483
TOTAL REVENUE		650,000	600,000	(50,000)	-8%	929,443	218,483

DIRECT EXPENSES:

50100	STAFF TRAVEL/PARKING	1,500	3,750	2,250	150%	3,765	1,402
50110	STAFF CONFERENCE & TRAINING	520	500	(20)	-4%	263	303
50120	STAFF MEMBERSHIP DUES	620	670	50	8%	613	-
TOTAL DIRECT EXPENSES		2,640	4,920	2,280	86%	4,641	1,706

INDIRECT EXPENSES:

51199	SALARY EXPENSE	714,291	751,265	36,974	5%	703,552	262,460
51299	BENEFITS EXPENSE	232,902	232,396	(506)	0%	221,122	76,713
51900	OTHER INDIRECT EXPENSE	203,876	176,878	(26,998)	-13%	200,758	58,910
51936	FACILITY RESERVE REBATE		-			15,520	-
TOTAL INDIRECT EXPENSES:		1,151,069	1,160,539	9,470	1%	1,140,952	398,083

TOTAL ALL EXPENSES:		1,153,709	1,165,459	11,750	1%	1,145,593	399,789
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NET INCOME (LOSS):		(503,709)	(565,459)	(61,750)	12%	(216,150)	(181,306)
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Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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FOUNDATION
Cost Center
FOUND

FY25 REFORECAST FTE 1.05
FY24 REFORECAST FTE 1.05

REVENUE:		TOTAL REVENUE	-	-	-	-	-
DIRECT EXPENSES:							
50033	CONSULTING SERVICES	3,000	3,200	200	7%	3,000	3,200
50050	EQUIPMENT, HARDWARE & SOFTWARE	-	2,400	2,400		2,175	878
50060	POSTAGE	350	400	50	14%	38	-
50070	PRINTING & COPYING	700	1,000	300	43%	452	-
50100	STAFF TRAVEL/PARKING	900	3,000	2,100	233%	269	-
50110	STAFF CONFERENCE & TRAINING	2,300	2,200	(100)	-4%	1,473	-
50140	SUPPLIES	150	2,000	1,850	1233%	81	-
52940	BOARD OF TRUSTEES	3,250	3,600	350	11%	1,245	62
TOTAL DIRECT EXPENSES		10,650	17,800	7,150	67%	8,733	4,140
INDIRECT EXPENSES:							
51199	SALARY EXPENSE	100,026	106,460	6,434	6%	100,198	35,695
51299	BENEFITS EXPENSE	38,468	34,056	(4,412)	-11%	37,670	10,962
51900	OTHER INDIRECT EXPENSE	30,935	26,838	(4,097)	-13%	28,230	8,918
TOTAL INDIRECT EXPENSES:		169,428	167,354	(2,074)	-1%	166,098	55,575
TOTAL ALL EXPENSES:		180,078	185,154	5,076	3%	174,831	59,715
NET INCOME (LOSS):		(180,078)	(185,154)	(5,076)	3%	(174,831)	(59,715)

HUMAN RESOURCES

Cost Center **FY25 REFORECAST FTI4.00**
HR **FY24 REFORECAST FTI4.00**

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

TOTAL REVENUE	-	-	-	-	-
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DIRECT EXPENSES:

50033	CONSULTING SERVICES	2,000	10,000	8,000	400%	-	-
50100	STAFF TRAVEL/PARKING	700	300	(400)	-57%	122	15
50110	STAFF CONFERENCE & TRAINING	-	2,200	2,200		-	171
50120	STAFF MEMBERSHIP DUES	1,000	1,000	-	0%	1,036	528
50130	SUBSCRIPTIONS	1,000	2,000	1,000	100%	1,904	993
54512	STAFF TRAINING- GENERAL	12,912	36,800	23,888	185%	10,295	447
54520	RECRUITING AND ADVERTISING	8,000	8,000	-	0%	6,110	1,865
54530	PAYROLL PROCESSING	50,000	50,000	-	0%	47,470	19,555
54540	SALARY SURVEYS	1,500	1,000	(500)	-33%	1,973	-
54590	TRANSFER TO INDIRECT EXPENSE	(77,112)	(111,300)	(34,188)	44%	(68,911)	(23,574)

TOTAL DIRECT EXPENSES	-	-	-	-	-
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INDIRECT EXPENSES:

51199	SALARY EXPENSE	608,465	585,774	(22,691)	-4%	537,380	196,579
51299	BENEFITS EXPENSE	98,842	115,845	17,003	17%	146,941	46,784
51925	ALLOWANCE FOR OPEN POSITIONS	(200,000)	(200,000)	-	0%	-	-
51900	OTHER INDIRECT EXPENSE	117,847	102,241	(15,606)	-13%	107,121	34,040

TOTAL INDIRECT EXPENSES:	625,154	603,860	(21,294)	-3%	791,442	277,402
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TOTAL ALL EXPENSES:	625,154	603,860	(21,294)	-3%	791,442	277,402
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NET INCOME (LOSS):	(625,154)	(603,860)	21,294	-3%	(791,442)	(277,402)
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Washington State Bar Association
Budget Comparison

LAW CLERK PROGRAM

Cost Center FY25 REFORECAST FTE 1.23
CLERK FY24 REFORECAST FTE 1.23

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

42275	LAW CLERK FEES	204,000	234,000	30,000	15%	201,068	194,500
42286	LAW CLERK APPLICATION FEES	3,200	3,200	-	0%	5,000	2,000
TOTAL REVENUE		207,200	237,200	30,000	14%	206,068	196,500

DIRECT EXPENSES:

50015	DEPRECIATION	4,675	12,000	7,325	157%	-	-
50100	STAFF TRAVEL/PARKING	500	-	(500)	-100%	24	-
50130	SUBSCRIPTIONS	250	250	-	0%	276	-
52245	CHARACTER & FITNESS INVESTI	100	100	-	0%	-	-
53282	SOFTWARE HOSTING	1,210	681	(529)	-44%	1,288	222
52255	LAW CLERK BOARD	8,000	8,000	-	0%	5,716	1,440
52258	LAW CLERK OUTREACH	5,000	30,000	25,000	500%	5,476	-
TOTAL DIRECT EXPENSES		19,735	51,031	31,296	159%	12,781	1,662

INDIRECT EXPENSES:

51199	SALARY EXPENSE	100,677	113,225	12,549	12%	102,505	37,406
51299	BENEFITS EXPENSE	31,257	38,208	6,952	22%	30,283	11,824
51900	OTHER INDIRECT EXPENSE	36,238	31,439	(4,799)	-13%	32,871	10,425
TOTAL INDIRECT EXPENSES:		168,171	182,873	14,702	9%	165,659	59,656

TOTAL ALL EXPENSES:		187,907	233,904	45,997	24%	178,440	61,318
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NET INCOME (LOSS):		19,293	3,296	(15,997)	-83%	27,628	135,182
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LEGISLATIVE
Cost Center
LEG

FY25 REFORECAST FTI1.70
FY24 REFORECAST FTI1.70

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

TOTAL REVENUE	-	-	-	-	-
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DIRECT EXPENSES:

50100	STAFF TRAVEL/PARKING	2,500	2,500	-	0%	83	243
50110	STAFF CONFERENCE & TRAINING	2,500	2,200	(300)	-12%	1,736	2,101
50120	STAFF MEMBERSHIP DUES	450	200	(250)	-56%	260	-
50130	SUBSCRIPTIONS	2,000	2,000	-	0%	1,985	1,986
50160	TELEPHONE	485	575	90	19%	577	192
52660	JUD RECOMMEND COMMITTEE	2,250	2,250	-	0%	-	-
54910	RENT - OLYMPIA OFFICE	1,500	-	(1,500)	-100%	-	-
54920	CONTRACT LOBBYIST	12,500	15,000	2,500	20%	12,500	3,000
54940	LEGISLATIVE COMMITTEE	1,250	1,250	-	0%	2	130
54970	BOG LEGISLATIVE COMMITTEE	300	300	-	0%	-	-

TOTAL DIRECT EXPENSES	25,735	26,275	540	2%	17,142	7,652
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INDIRECT EXPENSES:

51199	SALARY EXPENSE	152,783	160,438	7,654	5%	152,110	53,924
51299	BENEFITS EXPENSE	52,771	53,043	272	1%	51,366	17,078
51900	OTHER INDIRECT EXPENSE	50,085	43,453	(6,632)	-13%	45,633	14,445

TOTAL INDIRECT EXPENSES:	255,640	256,933	1,294	1%	249,109	85,447
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TOTAL ALL EXPENSES:	281,375	283,208	1,834	1%	266,251	93,099
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NET INCOME (LOSS):	(281,375)	(283,208)	(1,834)	1%	(266,251)	(93,099)
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LEGAL LUNCHBOX

Cost Center

LLB

FY25 REFORECAST FTI0.43

FY24 REFORECAST FTI0.43

Washington State Bar Association
Budget Comparison

FY2024
Reforecast

FY2025
Reforecast

FY24 vs. FY25
Comparison

% Change

FY2024
Actuals
YTD

FY2025
Actuals
YTD

REVENUE:

41450	SPONSORSHIPS	9,000	9,000	-	0%	9,000	-
43400	DIGITAL VIDEO SALES	20,000	25,000	5,000	25%	27,097	20,286
TOTAL REVENUE		29,000	34,000	5,000	17%	36,097	20,286

DIRECT EXPENSES:

52240	DISABILITY ACCOMMODATIONS	2,000	2,000	-	0%	-	-
53700	SPEAKERS & PROGRAM DEVELOP	100	100	-	0%	-	-
53730	HONORARIUM	1,500	1,500	-	0%	-	-
53283	ON24 OVERAGE CHARGE	4,500	4,500	-	0%	6,067	-
53731	INSURANCE REBATE	(425)	(3,375)	(2,950)	694%	(2,528)	-
TOTAL DIRECT EXPENSES		7,675	4,725	(2,950)	-38%	3,539	-

INDIRECT EXPENSES:

51199	SALARY EXPENSE	28,998	31,087	2,089	7%	29,074	10,383
51299	BENEFITS EXPENSE	10,648	11,797	1,149	11%	10,072	3,786
51900	OTHER INDIRECT EXPENSE	12,669	10,991	(1,678)	-13%	11,215	3,643
51935	INSURANCE REBATE	(4,060)	(19,016)	(14,956)	368%	(20,950)	-
TOTAL INDIRECT EXPENSES:		48,255	34,859	(13,396)	-28%	29,411	17,811

TOTAL ALL EXPENSES:		55,930	39,584	(16,346)	-29%	32,950	17,811
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NET INCOME (LOSS):		(26,930)	(5,584)	21,346	-79%	3,147	2,475
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LICENSING & MEMBERSHIP RECORDS
Cost Center **FY25 REFORECAST FT| 4.83**
LICMR **FY24 REFORECAST FT| 3.83**

Washington State Bar Association
Budget Comparison

FY2024	FY2025	FY24 vs. FY25	% Change	FY2024	FY2025
Reforecast	Reforecast	Comparison		Actuals	Actuals
				YTD	YTD

REVENUE:

41100	STATUS CERTIFICATE FEES	27,000	27,000	-	0%	29,600	11,125
42288	INVESTIGATION FEES	20,000	25,000	5,000	25%	27,700	11,300
42290	PRO HAC VICE	400,000	425,000	25,000	6%	496,975	135,623
45040	MEMBER CONTACT INFORMATION	3,700	5,000	1,300	35%	5,706	2,973
45060	PHOTO BAR CARD SALES	200	200	-	0%	276	204
TOTAL REVENUE		450,900	482,200	31,300	7%	560,257	161,225

DIRECT EXPENSES:

50033	CONSULTING SERVICES	-	6,000	6,000		6,000	-
50060	POSTAGE	17,652	4,000	(13,652)	-77%	14,599	89
50140	SUPPLIES	-	-	-		-	-
53282	SOFTWARE HOSTING	15,125	18,380	3,255	22%	16,105	5,940
55010	LICENSING FORMS	-	-	-		-	-
TOTAL DIRECT EXPENSES		32,777	28,380	(4,397)	-13%	36,704	6,029

INDIRECT EXPENSES:

51199	SALARY EXPENSE	401,688	515,705	114,016	28%	421,349	169,620
51299	BENEFITS EXPENSE	137,867	158,553	20,686	15%	138,247	50,700
51900	OTHER INDIRECT EXPENSE	112,839	123,457	10,618	9%	102,480	41,074
TOTAL INDIRECT EXPENSES:		652,394	797,715	145,320	22%	662,076	261,393

TOTAL ALL EXPENSES:		685,171	826,095	140,923	21%	698,780	267,422
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NET INCOME (LOSS):		(234,271)	(343,895)	(109,623)	47%	(138,523)	(106,197)
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LICENSE FEES
Cost Center
LIC

Washington State Bar Association					
Budget Comparison					
FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD

REVENUE:

40600	LICENSE FEES	16,692,574	16,853,241	160,667	1%	16,279,888	5,180,944
40625	LICENSE FEES - NEW ADMITTEES	417,925	429,375	11,450	3%	423,252	158,071
40650	LICENSE FEES - LATE FEES	200,000	200,000	-	0%	383,255	412
40675	LICENSE FEES - REINSTATEMENTS	10,000	10,000	-	0%	27,605	4,743
TOTAL REVENUE		17,320,499	17,492,616	172,117	1%	17,113,999	5,344,170
NET INCOME (LOSS):		17,320,499	17,492,616	172,117	1%	17,113,999	5,344,170

LIMITED LICENSE LEGAL TECHNICIAN PROGRAM

Cost Center **FY25 REFORECAST FTI0.48**
LLLT **FY24 REFORECAST FTI0.53**

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

41800	SEMINAR REGISTRATIONS	2,000	7,000	5,000	250%	1,045	5,600
42281	LLLT LICENSE FEES	18,562	17,731	(831)	-4%	15,296	5,004
42288	INVESTIGATION FEES	-	-	-		100	-
42291	LLLT LATE LICENSE FEES	-	-	-		404	-
45220	MCLE LATE FEES	150	300	150	100%	450	-
TOTAL REVENUE		20,712	25,031	4,319	21%	17,295	10,604

DIRECT EXPENSES:

52683	LLLT BOARD	14,240	11,500	(2,740)	-19%	1,341	368
52689	LLLT EDUCATION	-	1,000	1,000		-	35
TOTAL DIRECT EXPENSES		14,240	12,500	(1,740)	-12%	1,341	403

INDIRECT EXPENSES:

51199	SALARY EXPENSE	51,460	55,689	4,229	8%	51,982	20,181
51299	BENEFITS EXPENSE	14,055	17,525	3,470	25%	13,665	6,233
51900	OTHER INDIRECT EXPENSE	15,615	14,569	(1,045)	-7%	14,309	5,652
TOTAL INDIRECT EXPENSES:		81,130	87,784	6,654	8%	79,955	32,066

TOTAL ALL EXPENSES:		95,370	100,284	4,914	5%	81,297	32,469
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NET INCOME (LOSS):		(74,658)	(75,253)	(595)	1%	(64,002)	(21,865)
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Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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LIMITED PRACTICE OFFICERS
Cost Center
LPO
FY25 REFORECAST FTE 0.68
FY24 REFORECAST FTE 0.78

REVENUE:

42288	INVESTIGATION FEES	200	300	100	50%	1,500	300
45110	LPO EXAMINATION FEES	22,000	20,000	(2,000)	-9%	18,600	7,200
45115	LPO EXAM LATE FEES	3,300	3,000	(300)	-9%	2,300	1,200
45120	LPO LICENSE FEES	170,000	160,000	(10,000)	-6%	156,974	50,492
45125	LPO LATE LICENSE FEES	2,500	2,000	(500)	-20%	3,600	-
45220	MCLE LATE FEES	4,000	4,000	-	0%	3,150	1,650
TOTAL REVENUE		202,000	189,300	(12,700)	-6%	186,124	60,842

DIRECT EXPENSES:

50050	EQUIPMENT, HARDWARE & SOFTWARE	1,000	-	(1,000)	-100%	1,240	-
50070	PRINTING & COPYING	200	200	-	0%	123	-
50140	SUPPLIES	100	200	100	100%	113	-
52210	FACILITY, PARKING, FOOD	6,300	9,500	3,200	51%	7,333	-
52688	EXAM WRITING	9,000	19,000	10,000	111%	8,400	4,200
55130	LPO BOARD EXPENSES	4,000	4,000	-	0%	278	-
55165	LPO OUTREACH	1,000	1,000	-	0%	-	-
53282	SOFTWARE HOSTING	3,025	3,404	379	13%	3,221	1,101
TOTAL DIRECT EXPENSES		24,625	37,304	12,679	51%	20,708	5,301

INDIRECT EXPENSES:

51199	SALARY EXPENSE	69,420	66,043	(3,378)	-5%	70,170	21,424
51299	BENEFITS EXPENSE	19,678	21,528	1,849	9%	18,906	6,474
51900	OTHER INDIRECT EXPENSE	22,980	17,637	(5,344)	-23%	20,883	5,904
TOTAL INDIRECT EXPENSES:		112,079	105,207	(6,872)	-6%	109,959	33,801

TOTAL ALL EXPENSES:		136,704	142,511	5,807	4%	130,667	39,102
NET INCOME (LOSS):		65,296	46,789	(18,507)	-28%	55,457	21,740

MANDATORY CONTINUING LEGAL EDUCATION			Washington State Bar Association					
			Budget Comparison					
Cost Center	FY25 REFORECAST FTE		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
MCLE	FY24 REFORECAST FTE							
REVENUE:								
	45210	ACTIVITY APPLICATION FEE	550,000	600,000	50,000	9%	724,600	236,600
	45215	ACTIVITY APPLICATION LATE FEE	220,000	220,000	-	0%	266,650	101,200
	45220	MCLE LATE FEES	190,000	225,000	35,000	18%	266,925	66,600
	45230	ANNUAL ACCREDITED SPONSOR FEES	36,000	39,000	3,000	8%	37,500	24,000
	45250	ATTENDANCE LATE FEES	90,000	120,000	30,000	33%	120,050	44,450
	45255	COMITY CERTIFICATES - REQUEST	13,800	13,800	-	0%	13,497	8,100
	45260	COMITY CERTIFICATES - SUBMIT	14,000	16,000	2,000	14%	16,575	15,925
TOTAL REVENUE			1,113,800	1,233,800	120,000	11%	1,445,797	496,875
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	50	50	-	0%	-	-
	50110	STAFF CONFERENCE & TRAINING	4,000	4,600	600	15%	3,564	-
	50120	STAFF MEMBERSHIP DUES	500	500	-	0%	500	500
	55210	MCLE BOARD EXPENSES	5,000	4,000	(1,000)	-20%	-	992
	55220	DEPRECIATION-SOFTWARE	130,449	142,183	11,734	9%	124,381	48,048
TOTAL DIRECT EXPENSES			139,999	151,333	11,334	8%	128,445	49,540
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	454,500	400,391	(54,109)	-12%	445,511	147,004
	51299	BENEFITS EXPENSE	155,895	136,403	(19,492)	-13%	143,462	44,748
	51900	OTHER INDIRECT EXPENSE	173,235	121,923	(51,312)	-30%	157,394	40,697
TOTAL INDIRECT EXPENSES:			783,630	658,717	(124,913)	-16%	746,368	232,449
TOTAL ALL EXPENSES:			923,629	810,050	(113,579)	-12%	874,813	281,989
NET INCOME (LOSS):			190,171	423,750	233,579	123%	570,984	214,886

MEMBER WELLNESS PROGRAM

Cost Center

MWP

FY25 REFORECAST FTE 1.48

FY24 REFORECAST FTE 1.48

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
7,500	10,000	2,500	33%	11,050	1,500
7,500	10,000	2,500	33%	11,050	1,500
400	1,000	600	150%	-	-
312	4,400	4,088	1310%	527	75
700	800	100	14%	267	375
1,200	1,455	255	21%	1,324	441
1,000	4,250	3,250	325%	1,000	1,042
3,612	11,905	8,293	230%	3,117	1,933
133,585	144,902	11,316	8%	138,488	48,353
59,693	47,310	(12,383)	-21%	59,180	15,085
43,603	37,829	(5,774)	-13%	39,832	12,561
236,881	230,041	(6,841)	-3%	237,499	76,000
240,493	241,946	1,452	1%	240,617	77,933
(232,993)	(231,946)	1,048	0%	(229,567)	(76,433)

			Washington State Bar Association Budget Comparison							
MEMBER SERVICES & ENGAGEMENT			FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD		
Cost Center										
MSE										
FY25 REFORECAST FTE 2.45										
FY24 REFORECAST FTE 2.45										
REVENUE:										
	40900	ROYALTIES	10,800	10,800	-	0%	12,767	5,150		
	41450	SPONSORSHIPS	-	2,500	2,500		2,566	-		
	41800	SEMINAR REGISTRATIONS	-	3,000	3,000		1,980	-		
	TOTAL REVENUE		10,800	16,300	5,500	51%	17,313	5,150		
DIRECT EXPENSES:										
	50070	PRINTING & COPYING	1,300	1,600	300	23%	-	-		
	50085	YLL SECTION PROGRAM	1,500	1,300	(200)	-13%	-	555		
	50095	CLE COMPS	1,000	1,000	-	0%	-	-		
	50100	STAFF TRAVEL/PARKING	2,500	3,500	1,000	40%	20	36		
	50110	STAFF CONFERENCE & TRAINING	250	2,200	1,950	780%	339	-		
	50120	STAFF MEMBERSHIP DUES	845	450	(395)	-47%	150	-		
	54391	LAW LIBRARY DESKBOOK ACCESS	-	10,000	10,000		-	9,311		
	54610	LIBRARY MATERIALS/RESOURCES	4,000	4,000	-	0%	250	87		
	55266	NEW LAWYER OUTREACH EVENTS	1,500	5,000	3,500	233%	2,029	-		
	55270	NEW LAWYERS COMMITTEE	13,500	15,000	1,500	11%	2,584	703		
	55970	MEMBER ENGAGEMENT COUNCIL	1,000	500	(500)	-50%	-	-		
	55981	SMALL TOWN AND RURAL COUNCIL	55,000	65,000	10,000	18%	29,282	-		
	55980	OUTREACH AND ACTIVITIES	5,000	7,500	2,500	50%	55	-		
	57460	LAW SCHOOL OUTREACH	-	500	500		-	-		
	58450	RECEPTION/FORUM EXPENSE	1,000	1,000	-	0%	149	100		
	58500	NEW LAWYER OUTREACH	1,000	-	(1,000)	-100%	-	-		
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	-	(5,000)	-100%	-	-		
	TOTAL DIRECT EXPENSES		94,395	118,900	24,505	26%	34,857	10,792		
INDIRECT EXPENSES:										
	51199	SALARY EXPENSE	167,808	167,441	(367)	0%	159,996	43,574		
	51299	BENEFITS EXPENSE	57,800	65,553	7,753	13%	53,060	18,919		
	51900	OTHER INDIRECT EXPENSE	72,181	62,623	(9,559)	-13%	65,742	20,851		
	TOTAL INDIRECT EXPENSES:		297,790	295,617	(2,173)	-1%	278,797	83,344		
TOTAL ALL EXPENSES:			392,185	414,517	22,332	6%	313,654	94,136		
NET INCOME (LOSS):			(381,385)	(398,217)	(16,832)	4%	(296,341)	(88,986)		

MINI CLE
Cost Center
MINI

FY25 REFORECAST FTE 0.92
FY24 REFORECAST FTE 0.92

Washington State Bar Association					
Budget Comparison					
FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD

REVENUE:

TOTAL REVENUE	-	-	-	-	-
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DIRECT EXPENSES:

TOTAL DIRECT EXPENSES	-	-	-	-	-
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INDIRECT EXPENSES:

51199	SALARY EXPENSE	66,852	71,340	4,488	7%	67,856	23,862
51299	BENEFITS EXPENSE	22,372	26,074	3,701	17%	21,787	8,366
51900	OTHER INDIRECT EXPENSE	27,105	23,516	(3,589)	-13%	24,750	7,788
TOTAL INDIRECT EXPENSES:		116,330	120,930	4,600	4%	114,393	40,015
NET INCOME (LOSS):		(116,330)	(120,930)	(4,600)	4%	(114,393)	(40,015)

NEW MEMBER EDUCATION

Cost Center **FY25 REFORECAST FTE0.84**
NME **FY24 REFORECAST FTE0.84**

Washington State Bar Association
Budget Comparison

FY2024	FY2025	FY24 vs. FY25	% Change	FY2024	FY2025
Reforecast	Reforecast	Comparison		Actuals	Actuals
				YTD	YTD

REVENUE:

40950	NME PRODUCT SALES	40,000	150,000	110,000	275%	114,482	92,212
41800	SEMINAR REGISTRATIONS	15,000	13,000	(2,000)	-13%	16,455	3,564
47100	TRIAL ADVOCACY PROGRAM	12,000	15,000	3,000	25%	12,098	-
TOTAL REVENUE		67,000	178,000	111,000	166%	143,035	95,776

DIRECT EXPENSES:

55265	SPEAKERS & PROGRAM DEVELOPMENT	250	575	325	130%	-	-
57320	TRIAL ADVOCACY EXPENSES	1,500	2,025	525	35%	1,254	-
TOTAL DIRECT EXPENSES		1,750	2,600	850	49%	1,254	-

INDIRECT EXPENSES:

51199	SALARY EXPENSE	59,225	63,225	4,001	7%	58,755	21,373
51299	BENEFITS EXPENSE	22,105	23,475	1,370	6%	20,580	7,554
51900	OTHER INDIRECT EXPENSE	24,748	21,471	(3,277)	-13%	22,430	7,160
TOTAL INDIRECT EXPENSES:		106,078	108,171	2,093	2%	101,764	36,087
TOTAL ALL EXPENSES:		107,828	110,771	2,943	3%	103,019	36,087
NET INCOME (LOSS):		(40,828)	67,229	108,057	-265%	40,017	59,689

OFFICE OF GENERAL COUNSEL

Cost Center
OGC

FY25 REFORECAST FTE 6.47
FY24 REFORECAST FTE 6.07

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
-	-	-		427	-
-	-	-		315	270
-	-	-		742	270
-	3,500	3,500		-	-
6,656	6,215	(441)	-7%	3,094	-
2,868	2,090	(778)	-27%	1,075	1,625
2,100	-	(2,100)	-100%	-	-
6,000	6,000	-	0%	532	-
200	1,000	800	400%	3	136
1,000	1,000	-	0%	-	-
2,000	2,000	-	0%	-	-
5,000	5,000	-	0%	125	-
25,824	26,805	981	4%	4,829	1,761
682,914	682,130	(784)	0%	700,467	227,027
221,400	210,435	(10,965)	-5%	180,093	65,683
178,833	158,347	(20,487)	-11%	162,422	50,369
1,083,147	1,050,911	(32,235)	-3%	1,042,982	343,078
1,108,971	1,077,716	(31,254)	-3%	1,047,812	344,839
(1,108,971)	(1,077,716)	31,254	-3%	(1,047,070)	(344,569)

OFFICE OF THE EXECUTIVE DIRECTOR
Cost Center
OED

FY25 REFORECAST FTE 3.90
FY24 REFORECAST FTE 2.90

Washington State Bar Association					
Budget Comparison					
FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD

REVENUE:

TOTAL REVENUE	-	-	-	-	-
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DIRECT EXPENSES:

50100	STAFF TRAVEL/PARKING	4,450	2,000	(2,450)	-55%	2,485	715
50110	STAFF CONFERENCE & TRAINING	9,282	8,800	(482)	-5%	9,179	1,505
50120	STAFF MEMBERSHIP DUES	1,890	2,175	285	15%	1,240	645
50145	SURVEYS	-	-	-		-	-
52125	LEADERSHIP TRAINING	15,000	20,000	5,000	33%	16,016	-
52585	WASHINGTON LEADERSHIP INSTITUTE	80,000	100,000	20,000	25%	80,000	100,000
52590	BAR LEADERS CONFERENCE	-	-	-		-	-
52840	ED TRAVEL & OUTREACH	4,000	6,000	2,000	50%	5,601	406
TOTAL DIRECT EXPENSES		114,622	138,975	24,353	21%	114,521	103,271

INDIRECT EXPENSES:

51199	SALARY EXPENSE	491,121	602,222	111,100	23%	490,689	198,382
51299	BENEFITS EXPENSE	126,289	153,250	26,961	21%	134,228	52,201
51900	OTHER INDIRECT EXPENSE	85,439	99,685	14,246	17%	77,730	33,830
TOTAL INDIRECT EXPENSES:		702,850	855,157	152,307	22%	702,647	284,414

TOTAL ALL EXPENSES:	817,472	994,132	176,660	22%	817,168	387,685
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NET INCOME (LOSS):	(817,472)	(994,132)	(176,660)	22%	(817,168)	(387,685)
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OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD

Cost Center
OGCDB

FY25 REFORECAST FTE1.30
FY24 REFORECAST FTE1.40

Washington State Bar Association
Budget Comparison

		FY2024	FY2025	FY24 vs. FY25	% Change	FY2024	FY2025
		Reforecast	Reforecast	Comparison		Actuals	Actuals
						YTD	YTD
REVENUE:							
TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:							
50110	STAFF CONFERENCE & TRAINING	-	2,000	2,000		-	-
50120	STAFF MEMBERSHIP DUES	100	100	-	0%	-	-
54310	COURT REPORTERS	500	25,000	24,500	4900%	44,538	3,350
55310	DISCIPLINARY BOARD EXPENSES	4,000	5,000	1,000	25%	797	-
55320	CHIEF HEARING OFFICER	40,000	40,000	-	0%	39,996	13,332
55330	HEARING OFFICER EXPENSES	4,000	4,000	-	0%	874	18
55340	HEARING OFFICER TRAINING	400	1,000	600	150%	-	-
55370	APPOINTED COUNSEL	48,000	50,400	2,400	5%	49,600	16,800
55380	DISCIPLINARY SELECTION PANEL	1,000	1,000	-	0%	-	-
TOTAL DIRECT EXPENSES		98,000	128,500	30,500	31%	135,804	33,500
INDIRECT EXPENSES:							
51199	SALARY EXPENSE	129,192	125,704	(3,487)	-3%	135,940	43,970
51299	BENEFITS EXPENSE	34,681	41,128	6,446	19%	37,123	13,548
51900	OTHER INDIRECT EXPENSE	41,247	33,228	(8,018)	-19%	37,512	11,053
TOTAL INDIRECT EXPENSES:		205,120	200,060	(5,059)	-2%	210,574	68,572
TOTAL ALL EXPENSES:		303,120	328,560	25,441	8%	346,378	102,072
NET INCOME (LOSS):		(303,120)	(328,560)	(25,441)	8%	(346,378)	(102,072)

PRACTICE OF LAW BOARD
Cost Center
PLB

FY25 REFORECAST FTE 0.35
FY24 REFORECAST FTE 0.55

Washington State Bar Association					
Budget Comparison					
FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD

REVENUE:

TOTAL REVENUE	-	-	-	-	-
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DIRECT EXPENSES:

50130	SUBSCRIPTIONS	-	-	-	-	-
55510	PRACTICE OF LAW BOARD	12,000	16,000	4,000	33%	1,157
TOTAL DIRECT EXPENSES		12,000	16,000	4,000	33%	1,157

INDIRECT EXPENSES:

51199	SALARY EXPENSE	47,419	44,050	(3,369)	-7%	48,544	15,937
51299	BENEFITS EXPENSE	21,236	15,037	(6,199)	-29%	18,779	5,265
51900	OTHER INDIRECT EXPENSE	16,204	11,502	(4,702)	-29%	14,695	4,648
TOTAL INDIRECT EXPENSES:		84,860	70,590	(14,270)	-17%	82,019	25,850

TOTAL ALL EXPENSES:	96,860	86,590	(10,270)	-11%	83,176	25,850
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NET INCOME (LOSS):	(96,860)	(86,590)	10,270	-11%	(83,176)	(25,850)
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		Washington State Bar Association Budget Comparison					
		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
PRACTICE MANAGEMENT ASSISTANCE							
Cost Center							
PMA							
REVENUE:							
	40900						
	ROYALTIES	62,000	62,000	-	0%	69,581	16,480
	TOTAL REVENUE	62,000	62,000	-	0%	69,581	16,480
DIRECT EXPENSES:							
	50100						
	STAFF TRAVEL/PARKING	350	1,000	650	186%	386	-
	50110						
	STAFF CONFERENCE & TRAINING	260	2,500	2,240	862%	-	147
	50120						
	STAFF MEMBERSHIP DUES	150	150	-	0%	150	-
	54645						
	LEGAL TECH TASK FORCE	-	5,000	5,000		-	2,750
	55250						
	CASEMAKER/FASTCASE	75,000	85,000	10,000	13%	84,042	84,568
	TOTAL DIRECT EXPENSES	75,760	93,650	17,890	24%	84,578	87,465
INDIRECT EXPENSES:							
	51199						
	SALARY EXPENSE	83,329	89,534	6,205	7%	83,474	30,097
	51299						
	BENEFITS EXPENSE	25,645	29,659	4,014	16%	24,903	9,532
	51900						
	OTHER INDIRECT EXPENSE	27,989	24,282	(3,706)	-13%	25,523	8,039
	TOTAL INDIRECT EXPENSES:	136,963	143,475	6,512	5%	133,901	47,668
	TOTAL ALL EXPENSES:	212,723	237,125	24,402	11%	218,479	135,133
	NET INCOME (LOSS):	(150,723)	(175,125)	(24,402)	16%	(148,897)	(118,653)

PROFESSIONAL RESPONSIBILITY PROGRAM
Cost Center
PRP

FY25 REFORECAST FTI1.08
FY24 REFORECAST FTI1.10

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

TOTAL REVENUE		-	-	-	-	-
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DIRECT EXPENSES:

50100	STAFF TRAVEL/PARKING	1,500	4,000	2,500	167%	1,761	424
50110	STAFF CONFERENCE & TRAINING	-	2,200	2,200		-	-
50120	STAFF MEMBERSHIP DUES	500	500	-	0%	400	590
55610	CPE COMMITTEE	1,000	1,000	-	0%	386	286
TOTAL DIRECT EXPENSES		3,000	7,700	4,700	157%	2,547	1,301

INDIRECT EXPENSES:

		-					
51199	SALARY EXPENSE	138,408	141,621	3,213	2%	138,684	47,821
51299	BENEFITS EXPENSE	63,587	40,867	(22,720)	-36%	62,414	13,153
51900	OTHER INDIRECT EXPENSE	32,408	27,605	(4,803)	-15%	29,391	9,169
TOTAL INDIRECT EXPENSES:		234,403	210,093	(24,309)	-10%	230,489	70,143

TOTAL ALL EXPENSES:		237,403	217,793	(19,609)	-8%	233,036	71,444
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NET INCOME (LOSS):		(237,403)	(217,793)	19,609	-8%	(233,036)	(71,444)
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PUBLIC SERVICE PROGRAMS

Cost Center **FY25 REFORECAST FTE 1.62**
PSP **FY24 REFORECAST FTE 1.62**

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

40300	DONATIONS & GRANTS	130,000	135,280	5,280	4%	130,000	-
TOTAL REVENUE		130,000	135,280	5,280	4%	130,000	-

DIRECT EXPENSES:

50037	DONATIONS/SPONSORSHIPS/GRANTS	292,309	300,000	7,691	3%	278,889	78,441
50100	STAFF TRAVEL/PARKING	500	2,000	1,500	300%	333	54
50110	STAFF CONFERENCE & TRAINING	-	2,200	2,200		-	-
50145	SURVEYS	100	-	(100)	-100%	-	-
52110	PRO BONO & PUBLIC SERVICE COMMITTEE	2,500	2,500	-	0%	782	-
54130	PRO BONO OUTREACH	2,000	4,000	2,000	100%	1,978	169
TOTAL DIRECT EXPENSES		297,409	310,700	13,291	4%	281,983	78,664

INDIRECT EXPENSES:

51199	SALARY EXPENSE	128,379	136,915	8,536	7%	117,051	45,186
51299	BENEFITS EXPENSE	43,223	47,862	4,640	11%	37,768	15,238
51900	OTHER INDIRECT EXPENSE	47,728	41,408	(6,320)	-13%	43,312	13,817
TOTAL INDIRECT EXPENSES:		219,330	226,185	6,855	3%	198,131	74,241

TOTAL ALL EXPENSES:		516,739	536,885	20,146	4%	480,114	152,904
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NET INCOME (LOSS):		(386,739)	(401,605)	(14,866)	4%	(350,114)	(152,904)
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PUBLICATION & DESIGN SERVICES
Cost Center **FY25 REFORECAST FTE 0.89**
PUB **FY24 REFORECAST FTE 0.89**

Washington State Bar Association					
Budget Comparison					
FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD

REVENUE:

TOTAL REVENUE	-	-	-	-	-
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DIRECT EXPENSES:

50130	SUBSCRIPTIONS	200	200	-	0%	88	80
54026	IMAGE LIBRARY	4,100	4,800	700	17%	4,752	4,756
TOTAL DIRECT EXPENSES		4,300	5,000	700	16%	4,840	4,836

INDIRECT EXPENSES:

51199	SALARY EXPENSE	72,960	76,345	3,385	5%	76,767	27,013
51299	BENEFITS EXPENSE	23,139	26,506	3,367	15%	21,510	8,718
51900	OTHER INDIRECT EXPENSE	26,221	22,749	(3,472)	-13%	23,976	7,536
TOTAL INDIRECT EXPENSES:		122,320	125,600	3,279	3%	122,253	43,268
TOTAL ALL EXPENSES:		126,620	130,600	3,979	3%	127,093	48,104
NET INCOME (LOSS):		(126,620)	(130,600)	(3,979)	3%	(127,093)	(48,104)

REGULATORY SERVICES FTE
Cost Center
RSD FTE

FY25 REFORECAST FTE 2.2
FY24 REFORECAST FTE 2.60

Washington State Bar Association					
Budget Comparison					
FY2024	FY2025	FY24 vs. FY25	% Change	FY2024	FY2025
Reforecast	Reforecast	Comparison		Actuals	Actuals
				YTD	YTD

REVENUE:							
TOTAL REVENUE		-	-	-	-	-	-
DIRECT EXPENSES:							
50100	STAFF TRAVEL/PARKING	650	600	(50)	-8%	438	126
50110	STAFF CONFERENCE & TRAINING	19,500	8,400	(11,100)	-57%	5,913	600
50120	STAFF MEMBERSHIP DUES	350	490	140	40%	350	490
TOTAL DIRECT EXPENSES		20,500	9,490	(11,010)	-54%	6,700	1,216
INDIRECT EXPENSES:							
51199	SALARY EXPENSE	357,120	299,450	(57,670)	-16%	353,064	100,366
51299	BENEFITS EXPENSE	105,529	84,363	(21,166)	-20%	102,161	27,402
51900	OTHER INDIRECT EXPENSE	76,601	56,872	(19,729)	-26%	69,609	19,218
TOTAL INDIRECT EXPENSES:		539,250	440,685	(98,565)	-18%	524,834	146,985
TOTAL ALL EXPENSES:		559,750	450,175	(109,575)	-20%	531,535	148,202
NET INCOME (LOSS):		(559,750)	(450,175)	109,575	-20%	(531,535)	(148,202)

REGULATORY REFORM

Cost Center	FY25 REFORECAST FTE	1.8
RR	FY24 REFORECAST FTE	0.00

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

TOTAL REVENUE	-	-	-	-	-
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DIRECT EXPENSES:

50033	CONSULTING SERVICES	-	72,500	72,500	-	2,966
52691	OUTREACH EXPENSES	-	10,000	10,000	-	-
TOTAL DIRECT EXPENSES		-	82,500	82,500	-	2,966

INDIRECT EXPENSES:

51199	SALARY EXPENSE	-	157,764	157,764	-	36,829
51299	BENEFITS EXPENSE	-	46,175	46,175	-	9,771
51900	OTHER INDIRECT EXPENSE	-	32,589	32,589	-	6,406
TOTAL INDIRECT EXPENSES:		-	236,528	236,528	-	53,006

TOTAL ALL EXPENSES:	-	319,028	319,028	-	55,972
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NET INCOME (LOSS):	-	(319,028)	(319,028)	-	(55,972)
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SECTIONS ADMINISTRATION

Cost Center **FY25 REFORECAST FTI 2.53**
SECT **FY24 REFORECAST FTI 2.58**

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

48010	REIMBURSEMENTS FROM SECTIONS	297,786	275,000	(22,786)	-8%	275,415	323,838
TOTAL REVENUE		297,786	275,000	(22,786)	-8%	275,415	323,838

DIRECT EXPENSES:

50100	STAFF TRAVEL/PARKING	1,000	1,500	500	50%	59	-
50110	STAFF CONFERENCE & TRAINING	500	-	(500)	-100%	-	-
50120	STAFF MEMBERSHIP DUES	200	200	-	0%	-	-
50130	SUBSCRIPTIONS	350	-	(350)	-100%	331	-
52540	SECTION/COMMITTEE CHAIR MTGS	1,000	700	(300)	-30%	80	-
TOTAL DIRECT EXPENSES		3,050	2,400	(650)	-21%	470	-

INDIRECT EXPENSES:

51199	SALARY EXPENSE	159,053	169,092	10,038	6%	160,918	52,386
51299	BENEFITS EXPENSE	65,223	67,073	1,850	3%	67,620	20,839
51900	OTHER INDIRECT EXPENSE	76,011	64,668	(11,344)	-15%	69,223	21,730
TOTAL INDIRECT EXPENSES:		300,288	300,832	544	0%	297,761	94,955

TOTAL ALL EXPENSES:		303,338	303,232	(106)	0%	298,231	94,955
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NET INCOME (LOSS):		(5,552)	(28,232)	(22,680)	409%	(22,816)	228,883
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			Washington State Bar Association Budget Comparison					
			FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
SERVICE CENTER								
Cost Center	FY25 REFORECAST FTE	5.78						
SC	FY24 REFORECAST FTE	5.78						
REVENUE:								
TOTAL REVENUE			-	-	-		-	-
DIRECT EXPENSES:								
50100	STAFF TRAVEL/PARKING		2,376	2,376	-	0%	2,376	715
50110	STAFF CONFERENCE & TRAINING		2,184	677	(1,507)	-69%	10	-
54400	TRANSLATION SERVICES		-	-	-		-	-
TOTAL DIRECT EXPENSES			4,560	3,053	(1,507)	-33%	2,386	715
INDIRECT EXPENSES:								
51199	SALARY EXPENSE		394,527	427,125	32,598	8%	403,747	140,493
51299	BENEFITS EXPENSE		160,136	160,271	136	0%	156,116	50,656
51900	OTHER INDIRECT EXPENSE		170,289	147,739	(22,550)	-13%	154,687	49,364
TOTAL INDIRECT EXPENSES:			724,952	735,135	10,183	1%	714,551	240,513
TOTAL ALL EXPENSES:			729,512	738,188	8,676	1%	716,937	241,228
NET INCOME (LOSS):			(729,512)	(738,188)	(8,676)	1%	(716,937)	(241,228)

TECHNOLOGY

Cost Center
TECH

FY25 REFORECAST FTE 12.00
FY24 REFORECAST FTE 13.00

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

TOTAL REVENUE	-	-	-	-	-
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DIRECT EXPENSES:

50033	CONSULTING SERVICES	165,000	140,000	(25,000)	-15%	270,160	55,931
50100	STAFF TRAVEL/PARKING	1,000	1,000	-	0%	786	90
50110	STAFF CONFERENCE & TRAINING	6,000	6,000	-	0%	823	-
50120	STAFF MEMBERSHIP DUES	200	300	100	50%	120	-
50160	TELEPHONE	95,000	90,000	(5,000)	-5%	86,328	29,381
55911	CLOUD INFRASTRUCTURE	82,000	130,000	48,000	59%	43,143	13,494
56100	COMPUTER HARDWARE	66,200	66,200	-	0%	64,018	27,330
56150	COMPUTER SOFTWARE	330,000	530,000	200,000	61%	268,912	234,025
56225	HARDWARE SERVICE & WARRANTIES	50,000	50,000	-	0%	30,498	21,699
56230	SOFTWARE MAINT & LICENSING	380,000	400,000	20,000	5%	338,290	114,689
56550	THIRD PARTY SERVICES	10,000	65,000	55,000	550%	38,658	47,289
56900	TRANSFER TO INDIRECT EXPENSES	(1,185,400)	(1,478,500)	(293,100)	25%	(1,141,736)	(543,928)

TOTAL DIRECT EXPENSES	-	-	-	-	-
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INDIRECT EXPENSES:

51199	SALARY EXPENSE	1,434,388	1,422,045	(12,342)	-1%	1,419,189	474,385
51299	BENEFITS EXPENSE	480,053	421,171	(58,882)	-12%	426,935	126,346
51955	CAPITAL LABOR & OVERHEAD	(210,000)	(75,000)	135,000	-64%	(75,555)	(34,442)
51900	OTHER INDIRECT EXPENSE	383,003	306,724	(76,279)	-20%	348,046	102,370

TOTAL INDIRECT EXPENSES:	2,087,445	2,074,941	(12,504)	-1%	2,118,614	668,659
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TOTAL ALL EXPENSES:	2,087,445	2,074,941	(12,504)	-1%	2,118,614	668,659
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NET INCOME (LOSS):	(2,087,445)	(2,074,941)	12,504	-1%	(2,118,614)	(668,659)
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VOLUNTEER ENGAGEMENT

Cost Center **FY25 REFORECAST FTE 1.20**
VE **FY24 REFORECAST FTE 0.60**

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

TOTAL REVENUE	-	-	-	-	-
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DIRECT EXPENSES:

50060	POSTAGE	-	600	600		571	468
50110	STAFF CONFERENCE & TRAINING	2,600	5,200	2,600	100%	1,749	-
50120	STAFF MEMBERSHIP DUES	450	450	-	0%	300	210
50130	SUBSCRIPTIONS	750	816	66	9%	815	358
52520	ABA DELEGATES	14,000	16,000	2,000	14%	18,649	-
52521	VOLUNTEER RECOGNITION	-	2,000	2,000		-	-
57450	REGULATORY SCHOOL	-	12,000	12,000		-	5,102
TOTAL DIRECT EXPENSES		17,800	37,066	19,266	108%	22,084	6,138

INDIRECT EXPENSES:

51199	SALARY EXPENSE	60,485	127,293	66,808	110%	60,598	38,563
51299	BENEFITS EXPENSE	21,371	43,900	22,529	105%	20,940	14,556
51900	OTHER INDIRECT EXPENSE	17,677	37,063	19,385	110%	16,242	14,571
TOTAL INDIRECT EXPENSES:		99,534	208,256	108,722	109%	97,781	67,689

TOTAL ALL EXPENSES:	117,334	245,322	127,988	109%	119,864	73,828
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NET INCOME (LOSS):	(117,334)	(245,322)	(127,988)	109%	(119,864)	(73,828)
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All Sections
Cost Center
SECTOPS

Washington State Bar Association					
9/30/2024	9/30/2025			9/30/2024	1/31/2025
FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD

REVENUE:							
48200	SECTION DUES	438,431	438,280	(151)	0%	425,235	365,036
48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	-	-	-		-	141,745
41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		-	-
40500	INTEREST INCOME	17,147	2,050	(15,097)	-88%	108,323	-
40800	PUBLICATIONS REVENUE	1,500	1,250	(250)	-17%	1,949	-
	OTHER	78,010	44,203	(33,807)	-43%	43,100	13,325
	SEMINAR PROFIT SHARE	153,875	159,700	5,825	4%	167,365	-
TOTAL REVENUE		688,963	645,483	(43,480)	-6%	745,972	520,106
DIRECT EXPENSES:							
	DIRECT EXPENSES OF SECTION ACTIVITIES	733,096	759,773	26,677	4%	317,333	108,457
	REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES	284,470	280,433	(4,037)	-1%	275,378	323,838
TOTAL DIRECT EXPENSES		1,017,566	1,040,206	22,639	2%	592,711	432,296
NET INCOME (LOSS):		(328,603)	(394,722)	(66,120)	20%	153,261	87,810

ATTACHMENT B

CLE - PRODUCTS Cost Center CLEP			Washington State Bar Association Budget Comparison					
			FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
FY25 REFORECAST FTE 1.29 FY24 REFORECAST FTE 1.29								
REVENUE:								
	41000	SHIPPING & HANDLING	300	210	(90)	-30%	99	81
	43200	COURSEBOOK SALES	10,000	3,500	(6,500)	-65%	1,060	555
	43400	DIGITAL VIDEO SALES	900,000	845,000	(55,000)	-6%	1,030,455	513,223
TOTAL REVENUE			910,300	848,710	(61,590)	-7%	1,031,614	513,859
DIRECT EXPENSES:								
	50110	STAFF CONFERENCE & TRAINING	312	-	(312)	-100%	-	-
	50120	STAFF MEMBERSHIP DUES	-	300	300		-	-
	52240	DISABILITY ACCOMMODATIONS	2,000	2,000	-	0%	584	-
	53220	COST OF SALES - COURSEBOOKS	1,100	300	(800)	-73%	69	38
	53260	OBSOLETE INVENTORY	-	-	-		2,806	-
	53255	CLE-EQUIP-DEPRECIATION	2,040	2,012	(28)	-1%	2,040	680
	53285	ONLINE PRODUCT HOSTING EXPENSES	53,000	54,000	1,000	2%	49,000	18,020
	53330	POSTAGE & DELIVRY-COURSEBOOKS	500	200	(300)	-60%	43	31
TOTAL DIRECT EXPENSES			58,952	58,812	(140)	0%	54,542	18,769
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	95,891	102,132	6,241	7%	96,650	34,942
	51299	BENEFITS EXPENSE	46,535	36,973	(9,562)	-21%	44,297	11,967
	51900	OTHER INDIRECT EXPENSE	38,006	32,973	(5,033)	-13%	32,170	10,928
	51936	FACILITY RESERVE REBATE	-	-	-		(2,248)	-
TOTAL INDIRECT EXPENSES:			180,432	172,078	(8,354)	-5%	170,869	57,837
TOTAL ALL EXPENSES:			239,384	230,890	(8,494)	-4%	225,411	76,605
NET INCOME (LOSS):			670,916	617,820	(53,096)	-8%	806,202	437,253

CLE - SEMINARS Cost Center CLES			Washington State Bar Association Budget Comparison					
			FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
			FY25 REFORECAST FTE6.71 FY24 REFORECAST FTE6.60					
REVENUE:								
	41800	SEMINAR REGISTRATIONS	825,000	725,000	(100,000)	-12%	651,706	159,535
	41825	SEMINAR REVENUE-OTHER	20,000	20,000	-	0%	51,802	800
	41850	SEMINAR SPLITS W/ CLE	(150,000)	(150,000)	-	0%	(135,134)	-
TOTAL REVENUE			695,000	595,000	(100,000)	-14%	568,375	160,335
DIRECT EXPENSES:								
	50050	EQUIPMENT, HARDWARE & SOFTWARE	-	-	-		2,596	-
	50100	STAFF TRAVEL/PARKING	15,000	15,000	-	0%	14,718	53
	50110	STAFF CONFERENCE & TRAINING	2,465	5,900	3,435	139%	2,092	-
	50120	STAFF MEMBERSHIP DUES	1,000	1,200	200	20%	1,091	-
	50140	SUPPLIES	500	500	-	0%	379	-
	52240	DISABILITY ACCOMMODATIONS	5,000	5,000	-	0%	3,219	-
	53610	COURSEBOOK PRODUCTION	500	500	-	0%	18	-
	53640	ACCREDITATION FEES	3,000	3,000	-	0%	1,822	2,196
	53690	FACILITIES	160,500	165,000	4,500	3%	173,104	18,570
	53700	SPEAKERS & PROGRAM DEVELOP	45,000	48,000	3,000	7%	36,399	766
	53730	HONORARIUM	3,000	3,000	-	0%	-	-
	53740	CLE SEMINAR COMMITTEE	200	200	-	0%	-	-
TOTAL DIRECT EXPENSES			236,165	247,300	11,135	5%	235,438	21,586
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	487,487	528,792	41,305	8%	487,488	169,073
	51299	BENEFITS EXPENSE	188,518	191,718	3,200	2%	178,180	60,131
	51900	OTHER INDIRECT EXPENSE	194,448	171,510	(22,938)	-12%	165,230	57,151
	51936	FACILITY RESERVE REBATE					(11,500)	-
TOTAL INDIRECT EXPENSES:			870,452	892,020	21,568	2%	819,399	286,355
TOTAL ALL EXPENSES:			1,106,617	1,139,320	32,703	3%	1,054,836	307,940
NET INCOME (LOSS):			(411,617)	(544,320)	(132,703)	32%	(486,461)	(147,606)

			Washington State Bar Association					
			Budget Comparison					
			FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
DESKBOOKS								
Cost Center								
DESK								
	FY25 REFORECAST FTE	1.75						
	FY24 REFORECAST FTE	1.65						
REVENUE:								
	43100	DESKBOOK SALES (LEXISNEXIS PRINT)	30,000	30,000	-	0%	18,240	-
	43450	SECTION PUBLICATION SALES	1,500	1,000	(500)	-33%	630	-
	43455	LEXIS/NEXIS ROYALTIES	75,000	75,000	-	0%	69,907	0
	43525	CASEMAKER ROYALTIES	30,000	25,000	(5,000)	-17%	37,575	-
TOTAL REVENUE			136,500	131,000	(5,500)	-4%	126,352	0
DIRECT EXPENSES:								
	50120	STAFF MEMBERSHIP DUES	225	250	25	11%	248	-
	50130	SUBSCRIPTIONS	50	50	-	0%	43	-
	53210	COST OF SALES - DESKBOOKS	4,000	5,000	1,000	25%	5,154	-
	53225	COST OF SALES - SECTION PUBLIC	500	500	-	0%	429	-
	53260	OBSOLETE INVENTORY	21,000	48,250	27,250	130%	4,122	-
	53265	SPLITS TO SECTIONS	300	300	-	0%	185	-
	53270	DESKBOOK ROYALTIES	300	300	-	0%	305	-
	53320	POSTAGE & DELIVERY-COURSEBOOKS	-	300	300		-	-
TOTAL DIRECT EXPENSES			26,375	54,950	28,575	108%	10,486	-
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	155,883	178,087	22,205	14%	159,210	84,959
	51299	BENEFITS EXPENSE	51,896	56,847	4,951	10%	51,270	19,464
	51900	OTHER INDIRECT EXPENSE	48,612	44,731	(3,881)	-8%	44,086	14,947
TOTAL INDIRECT EXPENSES:			256,391	279,665	23,274	9%	254,566	119,370
TOTAL ALL EXPENSES:			282,766	334,615	51,849	18%	265,052	119,370
NET INCOME (LOSS):			(146,266)	(203,615)	(57,349)	39%	(138,699)	(119,370)

ATTACHMENT C

CLIENT PROTECTION FUND

Cost Center
CPF

FY25 REFORECAST FTI1.23
FY24 REFORECAST FTI1.23

Washington State Bar Association
Budget Comparison

FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
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REVENUE:

40500	INTEREST - INVESTMENTS	180,000	200,000	20,000	11%	268,185	70,542
44820	CPF RESTITUTION	10,000	10,000	-	0%	27,839	15,676
44840	CPF MEMBER ASSESSMENTS	525,930	720,540	194,610	37%	548,235	596,105
TOTAL REVENUE		715,930	930,540	214,610	30%	844,259	682,323

DIRECT EXPENSES:

50020	BANK FEES	3,000	2,500	(500)	-17%	(3,210)	(1,919)
50110	STAFF CONFERENCE & TRAINING	-	1,700	1,700		-	-
50120	STAFF MEMBERSHIP DUES	200	200	-	0%	200	-
54810	GIFTS TO INJURED CLIENTS	500,000	500,000	-	0%	418,710	(166,480)
54820	CPF BOARD	2,000	2,000	-	0%	887	-
TOTAL DIRECT EXPENSES		505,200	506,400	1,200	0%	416,587	(168,399)

INDIRECT EXPENSES:

51199	SALARY EXPENSE	110,717	115,160	4,443	4%	110,405	38,874
51299	BENEFITS EXPENSE	41,259	38,272	(2,987)	-7%	40,214	12,302
51900	OTHER INDIRECT EXPENSE	36,238	31,439	(4,799)	-13%	31,099	10,425
51936	FACILITY RESERVE REBATE					(1,773)	-
TOTAL INDIRECT EXPENSES:		188,214	184,871	(3,343)	-2%	179,946	61,601

TOTAL ALL EXPENSES:		693,414	691,271	(2,143)	0%	596,532	(106,798)
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NET INCOME (LOSS):		22,516	239,269	216,753	963%	247,727	789,121
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ATTACHMENT D

**2025 WSBA BUDGET WORKSHEET
CAPITAL BUDGET**

	COST CENTER	UNIT COST	QTY	AMOUNT	USEFUL LIFE (YRS)	ESTIMATED IN SERVICE DATE	ANNUAL DEPRECIATION EXPENSE	BUDGET FY 2025
Capital Labor (WSBA Developer Resources)								
Law Clerk Database	CLERK	60,000	1	60,000	5	Feb-25	18,006	12,004
Other development projects as needed	TBD	15,000		15,000	TBD	TBD	TBD	TBD
Total		75,000		75,000			18,006	12,004
Capital Hardware (General Indirects):								
Hardware replacements	INDIRECT	40,000	1	40,000	3	Oct-24	13,333	13,333
Total				40,000			13,333	13,333
Leasehold Improvements (General Indirects)								
Security System Upgrade	INDIRECT	10,000	1	10,000	10	Apr-25	1,000	500
Office Space Move/Downsizing Contingency	INDIRECT	10,000	1	10,000	10	Apr-25	750	750
Total				20,000			1,750	1,250
GRAND TOTAL				135,000			33,089	26,587

WASHINGTON STATE BAR ASSOCIATION

To: Board of Governors

From: Budget and Audit Committee

Subject: Recommendations RE: Client Protection Fund Assessment and Practice Rule 15 Changes

Date: April 14, 2025

ACTION REQUESTED: The Budget and Audit Committee recommends that the Board of Governors make the following recommendations to the Supreme Court:

1. Order that the Client Protection Fund assessment remain at \$20 for the 2026 licensing year.
2. Amend APR 15 Regulation 9(c) and (d) to increase the initial gift payment amount from \$5,000 to \$10,000.
3. Amend APR 15 Regulation 9(b) to increase the per claim limit on gifts from \$150,000 to \$250,000.

BACKGROUND:

The Client Protection Fund (CPF) assessment is charged to all licensed active members, House Counsel, Foreign Law Consultants, pro hac vice admissions, and Limited License Legal Technicians. The assessment is the main source of funding that supports gifts to compensate those financially victimized by legal professional dishonesty or failure to account for client funds/property. Over the past 20 years, the assessment has ranged from \$10 to \$30 and is set at \$20 for 2025. The CPF is WSBA's sole legally restricted fund, with revenue and expenses accounted for separately and with designated separate bank accounts and investments. Depending on the health of the CPF reserves, the assessment amount may be adjusted. The level of reserves is most significantly impacted by the awards given each year (see attachment for historical gifts and fund balances). Payments are limited to a maximum of \$150,000 per awardee, with a preliminary payment of no more than \$5,000 (remaining funds awarded are paid out at the end of the fiscal year).

At its April 14, 2025 meeting, the Budget and Audit Committee reviewed recommendations of the Client Protection Board (see *attachment A*) and unanimously approved three of the four recommendations to be moved forward to the Board of Governors.

ATTACHMENTS:

Attachment A: Client Protection Board Memo 3.24.2025

Attachment B: Memo Appendices A-E

WASHINGTON STATE BAR ASSOCIATION

Office of General Counsel

Nicole Gustine, Assistant General Counsel

TO: Budget and Audit Committee of the WSBA Board of Governors, as Trustees of the Client Protection Fund

FROM: Nicole Gustine, Assistant General Counsel

DATE: March 24, 2025

RE: Client Protection Board Recommendations RE: Assessment and Admission and Practice Rule 15 Changes

ACTION REQUESTED:

The Client Protection Board recommends that the Board of Governors make the following recommendations to the Supreme Court:

1. Order that the Client Protection Fund assessment remain at \$20 for the 2026 licensing year.
2. Include Limited Practice Officers in the order setting the assessment to the Client Protection Fund starting with the 2026 licensing year and continuing thereafter.
3. Amend APR 15 Regulation 9(c) and (d) to increase the initial gift payment amount from \$5,000 to \$10,000.
4. Amend APR 15 Regulation 9(b) to increase the per claim limit on gifts from \$150,000 to \$250,000.

I. BACKGROUND

The purpose of the Client Protection Fund (Fund) is to promote public confidence in the administration of justice and the integrity of the legal profession. The Fund may be used to relieve or mitigate pecuniary loss by any person, caused by a licensed legal professional's dishonesty, or failure to account for money or property entrusted to them, as a result of or directly related to the practice of law or while acting as a fiduciary in a matter directly related to the licensed legal professional's practice of law. Admission and Practice Rule (APR) 15 (a) and (b)(3). The Client Protection Board (CPB) meets quarterly to review applications to the Fund and to make decisions on payment for eligible claims.

The CPB met on February 3, 2025, and in addition to considering claims to the Fund, considered the four recommendations contained in this memo. The CPB examined historical and financial data and voted to make these recommendations to the Budget and Audit committee of the Board of Governors (BOG), who serve as Trustees of the Fund.

II. The CPB recommends that the Board of Governors:

1. **Recommend to the Supreme Court that the Client Protection Fund assessment remain at \$20 for the 2026 licensing year.**



Per APR 15 Regulation 2. (b), the “Trustees may recommend to the Supreme Court that it order an annual assessment of all active lawyers, LLLTs, or LPOs of the Bar in an amount recommended by the Trustees to be held by them in trust for the purposes of the Fund.”

WSBA Director of Finance Tiffany Lynch shared a November 2024 memo to the Budget and Audit Committee with the CPB and asked that the CPB make a recommendation as to setting the assessment for the 2026 licensing year. (Appendix A). Between 2010 and 2020, the assessment was set at \$30. Due to the Covid-19 pandemic, the BOG recommended, and the Supreme Court agreed, to order that the assessment be set at \$10 in 2021. The assessment was raised to \$20 for 2022 and 2023, lowered to \$15 in 2024, and raised back to \$20 in 2025. (Appendix B). As of December 31, 2024, the Fund had a balance of \$4,987,804 (Appendix C). Since 2014, the amounts of gifts paid on eligible applications to the Fund ranged from a low of \$253,228 in 2016, to a high of \$926,434 in 2018. (Appendix D). Weighing both the healthy balance of the Fund with the potential for increasing gift demand, the CPB voted unanimously to keep the assessment at \$20 for 2026.

2. Recommend that the Supreme Court’s assessment order include LPOs starting with the 2026 licensing year and continuing thereafter.

Currently, WSBA lawyers on active status, lawyers with pro hac vice admissions, in-house counsel, house counsel, foreign law consultants, and Limited Licensed Legal Technicians (LLLTs) all pay an annual assessment to the Fund. Limited Practice Officers (LPOs) have not been included in the assessment. However, the CPB is authorized to accept and consider applications from, and award gifts to the injured clients of LPOs. APR 15(b)(3). To date, the CPB has received, considered, and approved a gift in the amount of \$2,800 on one claim regarding an LPO. Given the unpredictable nature of dishonesty and the resulting claims, there is the potential for more LPO-related applications to the Fund in the future. Therefore, the CPB is proposing that the BOG recommend that the Supreme Court include LPOs in the assessment order for the 2026 licensing year. An assessment of \$20 is reasonable because the clients of LPOs are equally at risk from the possibility of loss from their legal provider’s dishonest conduct. The CPB acknowledges that a lower assessment may be appropriate given that LPOs generally charge less for their services than lawyers and that so far, they have not created as much loss exposure to the Fund. In addition, LPOs bear the mandated expense of carrying malpractice insurance. The recommendation to include LPOs in the 2026 assessment was unanimously approved by the members of the CPB.

3. Recommend a rule change to APR 15 Regulation 9 (c) and (d) to increase the initial gift payment amount from \$5,000 to \$10,000.

In September 2017, APR 15 Regulation 9(c) and (d) were amended to the following:

(c) Applications approved for \$5,000 or less shall be paid in full upon approval by the Client Protection Board (and the Trustees, if required under these Rules and Regulations). Applications approved for more than \$5,000 shall be paid \$5,000 upon approval by the Client Protection Board (and the Trustees, if required under these Rules and Regulations); payment of the remaining balance approved shall be deferred until fiscal year end and shall be subject to any proration which may be approved by the Trustees.

(d) At the last meeting of the Trustees for each fiscal year, the Client Protection Board shall report the total outstanding balance on approved gifts and shall recommend whether the outstanding balance should be paid in full or prorated. When approved gifts are prorated, the prorated

payment shall reflect the total amount of the gift, less the initial \$5,000 payment made upon approval by the Client Protection Board

The CPB recommends amending the rule to raise the initial payment amount from \$5,000 to \$10,000. Because of the time it takes to process and approve a change to a court rule, acting on this recommendation now means that the initial payment amount will essentially be raised once within ten years, which is a reasonable economic adjustment. Further, this change will increase administrative efficiency and ease the accounting burdens of the Fund because amounts of \$10,000 or less could be fully processed at one time. Gift recipient satisfaction will also increase as they will receive either a more substantial initial payment or payment in full, earlier in the process. This will also save time and resources for WSBA staff processing the gift payments. This recommendation was unanimously approved by the members of the CPB.

4. Recommend a rule change to APR 15 Regulation 9(b) to increase the per claim limit on gifts from \$150,000 to \$250,000.

In September 2017 APR 15 Regulation 9(b) was amended to the following:

The maximum allowable amount of a gift is \$150,000. There is no limit on the number of gifts that can be made to reimburse clients for the wrongful acts of any one lawyer, LLLT, or LPO.

Prior to this 2017 change, the maximum gift amount had been \$75,000 since 2004. The Fund's balance has remained substantial in recent years since the 2017 increase to the \$150,000 gift limit. The CPB considered worst case scenarios, such as if in a future year, the Fund receives applications that qualify for payment in an amount that exceeds the resources of the Fund. The CPB determined that the Fund is protected in such a scenario because APR 15 Regulation 9(d) referenced above, gives the Trustees authority to prorate gifts at the end of the fiscal year. This rule provides the Trustees with flexibility to prorate and assure that the Fund's balance remains adequate to pay claims, even in the event of excessive claims.

The Fund continues to receive applications from injured clients who, through no fault of their own, have suffered losses over the \$150,000 limit. The CPB reviewed historical data to determine the number of approved applications since the 2017 change increasing the gift limit, where the applicant claimed a loss exceeding \$150,000, which would have otherwise been paid. There were six such claims paid between 2017 and 2024. (Appendix E). The gifts to these injured clients were more than \$700,000 less than needed to make them whole financially. Given the purpose of the Fund, and that revenue from assessments, restitution, and interest income have kept the financial condition of the Fund healthy and growing, the CPB unanimously approved a recommendation to a rule change increasing the maximum gift amount from the Fund to \$250,000.

III. Conclusion

The Client Protection Board thanks the Board of Governors for its consideration of its recommendations and welcomes additional questions or discussion.

WASHINGTON STATE BAR ASSOCIATION

To: Budget and Audit Committee

From: Tiffany Lynch, Director of Finance

Subject: 2026 Client Protection Fund Assessment

Date: November 20, 2024

The Client Protection Fund (CPF) assessment is charged to all licensed active members, House Counsel, Foreign Law Consultants, pro hac vice admissions, and Limited License Legal Technicians. The assessment is the main source of funding that supports gifts to compensate those financially victimized by legal professional dishonesty or failure to account for client funds/property. Over the past 20 years, the assessment has ranged from \$10 to \$30 and is set at \$20 for 2025. The CPF is WSBA's sole legally restricted fund, with revenue and expenses accounted for separately and with designated separate bank accounts and investments. Depending on the health of the CPF reserves, the assessment amount may be adjusted. The level of reserves is most significantly impacted by the awards given each year (see attachment for historical gifts and fund balances). Payments are limited to a maximum of \$150,000 per awardee, with a preliminary payment of no more than \$5,000 (remaining funds awarded are paid out at the end of the fiscal year).

The Budget and Audit Committee will need to make a recommendation to the Board of Governors for the 2026 assessment rate (which is set by the Supreme Court) during this fiscal year. The CPF Board meets on a quarterly basis, with the next meeting scheduled for February 3, 2025, where they will be discussing and developing a recommendation for the 2026 assessment. Additionally, at their meetings this year the CPF Board may review the maximum award amount of \$150,000 (last raised from \$75,000 in 2016), consider increasing the preliminary payment from \$5,000 to \$10,000, and discuss applying the assessment to Limited Practice Officers. Approval of any of these changes could have an impact on future reserve balances.

We plan to include the 2026 CPF assessment on the B & A Committee's April 14, 2025 meeting agenda for action. If approved, the recommendation will be presented to the Board of Governors at the May 2-3, 2025 meeting.

Appendix A

Fiscal Year	Gifts To Injured Clients	Client Protection Fund Balance	Assessment Rate
2014	\$339,161	\$1,491,177	\$30
2015	\$490,357	\$2,144,289	\$30
2016	\$371,452	\$2,646,222	\$30
2017	\$318,584	\$3,242,299	\$30
2018	\$917,051	\$3,227,988	\$30
2019	\$379,818	\$3,816,144	\$30
2020	\$591,449	\$4,193,131	\$30
2021	\$499,637	\$4,046,247	\$10
2022	\$566,947	\$4,063,501	\$20
2023	\$342,424	\$4,513,398	\$20
2024	\$418,710	\$4,759,159	\$15
2025 Budget	\$500,000	\$5,000,335	\$20

Appendix B

Year	Assessment	Order
2025	\$20	25700-B-705
2024	\$15	25700-B-670
2023	\$20	25700-B-655
2022	\$20	25700-B-655
2021	\$10	25700-B-641, 25700-B-599
2010-2020	\$30	25700-B-587, 25700-B-496
2007-2009	\$15	
2001-2006	\$13	
1996-2000	\$10	

Appendix C

Statement of Financial Position

Unaudited
As of
12/31/2024

Assets

Checking Account	168,775
Accrued Interest Receivable	41,249
Money Market	2,790,747
Investments	2,466,671
Money Market	-
Total Assets	<u>5,467,443</u>

Liabilities and Net Assets

Approved gifts to injured clients payable	378,125
Liability to WSBA general fund	101,514
Net Assets	4,987,804
Total liabilities and net assets	<u>5,467,443</u>

Statement of Activities

Unaudited
As of
12/31/2024

Revenue

Restitution	13,967
Member Assessment	207,590
Interest	50,741
Total Revenue	<u>272,299</u>

Expenses

Misc.	(1,779)
Gifts to Injured Clients	-
CPF Board	-
Staff Membership Dues	-
Indirect (overhead)	46,407
Total Expense	<u>44,628</u>

Net Income (Expense)	227,670
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Statement of Changes in Net Assets

Balance at September 30, 2024	<u>4,759,353</u>
Net Income as of December 31, 2024	<u>227,670</u>
Balance as of December 31, 2024	<u>4,987,804</u>

Appendix D

Client Protection Fund Applications 2014-2023

Fiscal Year	# Of Members ¹	# Of Members With Approved Applications	# Of Applications Received	# Of Applications Approved	Gifts Approved
2014	31,495	14	141	44	\$337,160
2015	31,335	20	79	59	\$495,218
2016	32,969	16	56	44	\$253,228
2017	33,357	19	72	47	\$439,273
2018	33,858	18	119	46	\$926,434
2019	34,388	18	61	48	\$419,488
2020	34,905	16	57	33	\$586,266
2021	34,839	18	107	29	\$491,737
2022	33,121	13	49	33	\$587,815
2023	33,383	14	41	42	\$342,424

¹ Through December 31, 2018, only lawyers on Active status, pro hac vice, in-house counsel, house counsel, and foreign law consultants paid the assessment. Effective January 1, 2019, Limited Licensed Legal Technicians (LLLTs), also paid the assessment.

Appendix E

\$150k CPF Gift Payments - FY 2017 through November 2024

#	Attorney	Applicant	Application Amount	Status	Board Decision Date	Amount Paid	Unpaid
16-025	Gainer, Michael		244,207.00	Approved	11/8/2016	\$150,000	\$94,207.00
17-053	Neal, Christopher		262,815.00	Approved	5/7/2018	\$150,000	\$112,815.00
18-018	Johnson, Holly		430,000.00	Approved	11/6/2017	\$150,000	\$280,000.00
18-043	Siefkes, Michael		303,254.25	Approved	2/3/2020	\$150,000	\$153,254.25
18-098	Quick, Daniel		202,775.00	Approved	11/9/2020	\$150,000	\$52,775.00
19-043	Meade, Marcia		180,631.53	Approved	2/14/2022	\$150,000	\$30,631.53
			1,623,682.78			\$900,000	\$723,682.78

WASHINGTON STATE BAR ASSOCIATION

To: Board of Governors

From: Tiffany Lynch, Director of Finance
Terra Nevitt, Executive Director

Subject: License Fee Philosophy

Date: April 14, 2025

FIRST READ: Proposed language to establish a license fee philosophy is presented for discussion and first read.

BACKGROUND:

The 2026 license fees set at the November BOG meeting were recommended as a starting point for developing a license fee philosophy. The Budget and Audit Committee was tasked with developing the draft philosophy, with the goal of creating a consistent approach by which fees would increase in alignment with an annual measure such as the cost-of-living adjustment (COLA) while also incorporating flexibility to adjust the fee based on availability of reserves. A preliminary draft of the philosophy was presented at the Board of Governors Budget Retreat on March 22, 2025. Suggestions for changes to the policy were provided and edits are included in the draft License Fee Philosophy (*attachment A*). Additionally, there was a request for information about the cost to practice law in other jurisdictions, which is provided in *attachments B* and *C*.

ATTACHMENTS:

License Fee Philosophy- April 2025 Draft (Attachment A)
Mandatory Bar Fees (Attachment B)
Total Cost to Practice (Attachment C)

April 2025 DRAFT –License Fee Philosophy

Adopted: **Month D, YYYY.**

A. Purpose

To create a consistent approach to setting license fees by which fees increase in alignment with an annual market measure (based on an industry benchmark defined in section D) that more closely ties to actual increases in the cost of doing business, while also incorporating flexibility to adjust the fee based on availability of reserves.

B. Philosophy

a. Philosophy regarding growth of the license fee

In order to maintain existing programming and services, it is anticipated that license fees will increase annually to account for increasing costs, including facilities, salaries and benefits, and direct costs. Increases will vary based on membership trends and the changes to the industry benchmark defined in section D. From that basepoint assumption, the license fee may need to be adjusted up or down to account for shifts in programming and the availability of reserves. Because license fees are set before all organizational needs are identified, WSBA should maintain reserves sufficient to seed desired shifts in programming, which will require increased license fees to maintain.

b. Philosophy regarding use of license fees

License fees are collected primarily to cover the cost of regulation, as well as programs mandated by the Supreme Court. At the discretion of the Board of Governors, license fees are also used to support programming, services, and the development of tools to serve other aspects of the mission, including supporting legal professionals to better serve the public and other purposes as articulated in GR12.

WSBA shall determine the criteria for evaluating all programs and services to determine resource allocation. Examples of criteria for evaluating member benefits could include: (1) how many members the activity can potentially benefit, (2) how closely the benefit is tied to or furthers a strategic goal, (3) how popular the benefit is, and (4) cost per member to fully or partially subsidize.

C. Process for developing a proposed license fee

Step 1: An effective license fee increase will be developed based on membership trends and apply the industry benchmark (defined in section D). This is considered the status quo effective license fee.

Step 2: Identify desired program shifts and their impact on the effective license fee.

Step 3: The effective license fee can be adjusted up or down based on the level of required reserves, as well as the level of reserves available. This is considered the status quo actual license fee change.

D. Industry Benchmark

Inflation reflects the average change in the price of goods and services over time. WSBA will use the Cost-of-Living Adjustment (COLA) for Washington State Labor and Industries (L&I) as the industry benchmark for calculating the effective license fee. The rate is established annually and will be used to develop a license fee recommendation in alignment with WSBA's annual budget and license fee approval process.

Attachment B

MANDATORY BAR ASSOCIATION FEES ¹			
State	Membership	Total Cost to Practice	Earmarked for Client Protection
Alaska	4,786	\$ 660.00	\$ 10.00
Arizona*	25,873	\$ 505.00	\$ 20.00
California ^A	271,497	\$ 463.00	\$ 40.00
District of Columbia	116,000	\$ 560.00	\$ -
Florida	112,515	\$ 265.00	\$ 25.00
Hawaii ^B	8,291	\$ 569.00	\$ 50.00
Idaho	7,175	\$ 425.00	\$ -
Kentucky	19,581	\$ 310.00	\$ 7.00
Louisiana	28,369	\$ 435.00	\$ -
Michigan*	42,073	\$ 415.00	\$ 15.00
Mississippi	11,111	\$ 380.00	\$ -
Missouri	49,006	\$ 410.00	\$ -
Montana	52,621	\$ 515.00	\$ 20.00
Nevada	12,301	\$ 450.00	\$ 50.00
New Hampshire	7,500	\$ 615.00	\$ 30.00
New Mexico*	8,102	\$ 440.00	\$ 15.00
North Carolina	43,945	\$ 440.00	\$ 25.00
North Dakota	3,065	\$ 380.00	\$ 16.00
Oklahoma	18,734	\$ 275.00	\$ 50.00
Oregon* ^C	23,358	\$ 688.00	\$ 20.00
Rhode Island	6,319	\$ 425.00	\$ 25.00
South Carolina	11,003	\$ 325.00	\$ 20.00
South Dakota	4,800	\$ 540.00	\$ -
Texas	111,412	\$ 300.00	\$ 10.00
Utah*	13,861	\$ 435.00	\$ 5.00
Virginia	57,537	\$ 285.00	\$ 5.00
Washington	40,967	\$ 473.00	\$ 15.00
West Virginia	9,601	\$ 250.00	\$ -
Wisconsin	19,927	\$ 523.00	\$ 25.00
Wyoming	3,378	\$ 355.00	\$ -

*Mandatory Bar Associations most comparable to Washington based on size or scope of services provided.

^A\$125 increase had been requested, \$88 was approved. Total cost to practice in 2025 is \$598 for full active attorney.

^B\$150 increase had been requested. Updated information: total cost to practice in 2025 is \$679 for active attorney 5+ years of practice, including \$60 earmarked for Client Protection.

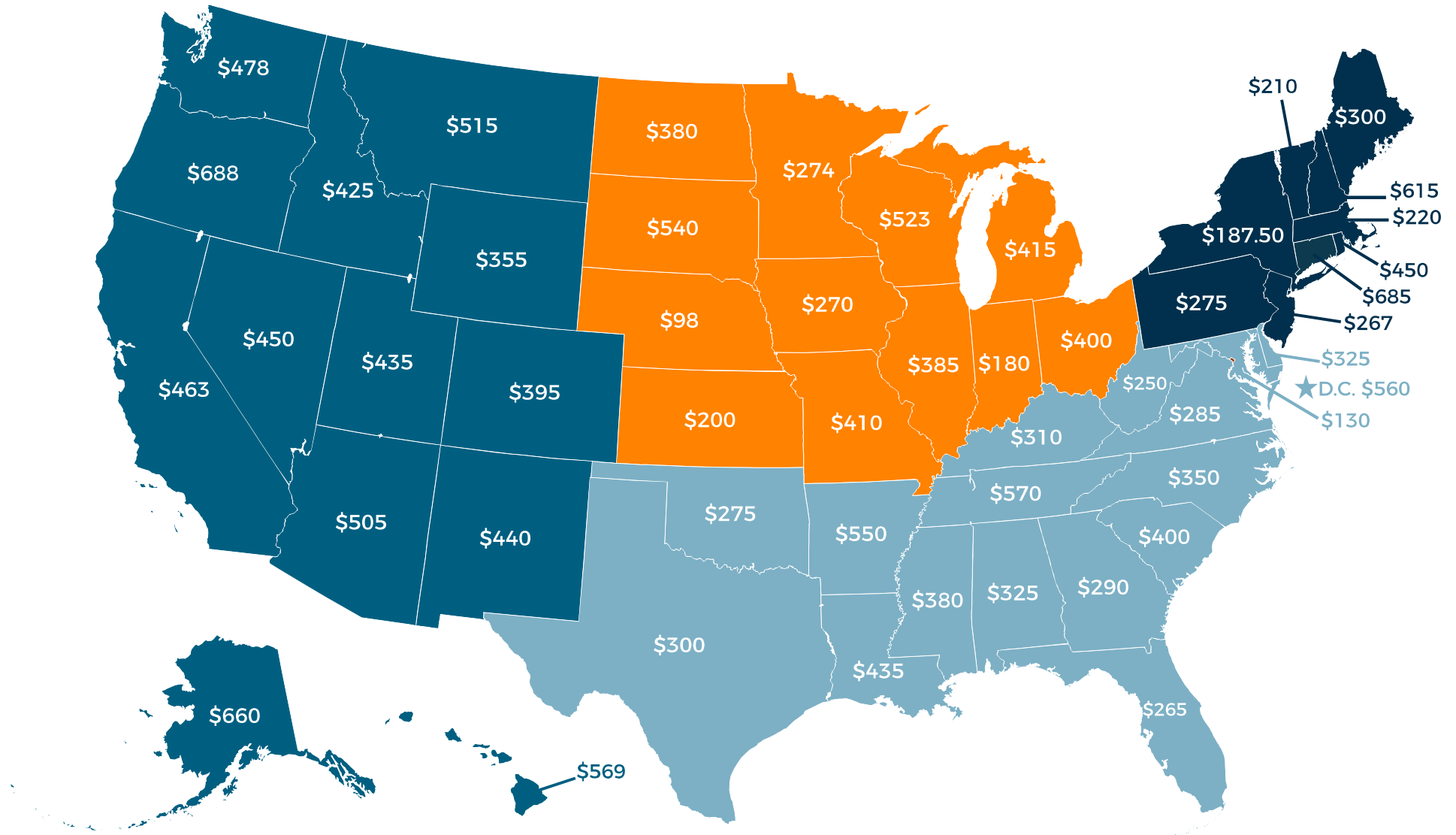
^C\$3,500 mandatory malpractice insurance required

¹ Information provided from 2024 ABA Bar Benchmarks Survey and International Survey of Attorney Licensing Fees compiled by Office of Attorney Ethics of New Jersey

TOTAL COST TO PRACTICE

U.S. Census Bureau Regions

West Midwest Northeast South



LICENSING FEES

Total Cost to Practice & Licensing/Registration Fees

Includes all mandatory state bars reporting data and any state licensing agency or voluntary state bar reporting data for states without a mandatory state bar.

Enter the total cost to practice in your state (or territory).	Min	Max	Mean	Median	Responses
South	\$130	\$570	\$340	\$318	16
West	\$355	\$688	\$491	\$463	13
Northeast	\$188	\$685	\$377	\$288	10
Midwest	\$98	\$540	\$340	\$383	12

What is the total licensing/registration fee?	Min	Max	Mean	Median	Responses
South	\$130	\$380	\$263	\$265	16
West	\$275	\$688	\$470	\$450	13
Northeast	\$188	\$615	\$321	\$284	10
Midwest	\$98	\$540	\$327	\$327	12

**Provide the breakdown of fees for the cost to practice in your state (or territory).	Min	Max	Mean	Median	Responses
Client protection fund fee	\$5	\$130	\$32	\$25	28
Discipline system fee	\$25	\$260	\$164	\$165	20
Mandatory CLE fee	\$5	\$229	\$43	\$20	10
Lawyer assistance program fee	\$10	\$44	\$22	\$20	9
Legal services/legal aid/access to justice	\$2	\$65	\$32	\$36	7
Yearly Assessment	\$25	\$658	\$328	\$331	17
Other	\$6	\$450	\$177	\$180	15

***Categories with more than two responses only.*

State/District/Territory

Total Cost to Practice in State & Licensing/Registration Fees

**Total licensing/registration fees include the highest fee.*

State/District/Territory	Total Cost to Practice	*Highest Licensing/Reg. Fees	Cost to Practice Fees Breakdowns (If Known)
Alabama	\$325	\$325	Client protection fund fee: \$25
Alaska	\$660	\$660	Client protection fund fee: \$10; Discipline system fee: \$260; Mandatory CLE fee: \$12; Legal services/legal aid/access to justice: \$36; Other: \$342 (Administration, CLE, Fee Arbitration, Board of Governors, Lawyer Referral, Bar Rag, FastCase, Committees, Sections and WebPages
Arizona	\$505	\$485	Client protection fund fee: \$20; Yearly Assessment: \$485
Arkansas	\$550	\$200	Professional commission fee: \$200
California	\$463	\$390	Client protection fund fee: \$40; Discipline system fee: \$25; Building fund: \$4; Lawyer assistance program fee: \$10; Technology fund: \$5; Yearly Assessment: \$390 (The 2023 licensing fee is \$390. However, there is a \$2 Elimination of Bias opt-out fee. The building fund and technology fund fees are also included in the \$390 licensing fee.)
Colorado	\$395	\$395	Client protection fund fee: \$20; Yearly Assessment: \$375
Connecticut	\$685	\$575	Client protection fund fee: \$100
Delaware	\$325	\$325	N/A
District of Columbia	\$560	\$331	Mandatory CLE fee: \$229; Yearly Assessment: \$331 Mandatory annual license fee Active class members and Special Legal Consultants. Inactive members pay \$206; Judicial members pay \$150.
Florida	\$265	\$265	N/A
Georgia	\$290	\$264	Client protection fund fee: \$15; Professional commission fee: \$11
Hawaii	\$569	\$569	Client protection fund fee: \$50; Discipline system fee: \$250; Lawyer assistance program fee: \$44; Yearly Assessment: \$210 annual bar dues; Other: \$15 processing fee
Idaho	\$425	\$425	N/A
Illinois	\$385	\$385	Client protection fund fee: \$25; Discipline system fee: \$210; Professional commission fee: \$25; Lawyer assistance program fee: \$20; Legal services/legal aid/access to justice: \$10; Other: \$95 Lawyers Trust Fund fee
Indiana	\$180	\$180	Other: \$180 Attorney Services Fund

State/District/Territory	Total Cost to Practice	*Highest Licensing/Reg. Fees	Cost to Practice Fees Breakdowns (If Known)
Iowa	\$270	\$270	Client protection fund fee: \$50; Discipline system fee: \$200; Mandatory CLE fee: \$20
Kansas	\$200	\$200	Discipline fee: \$180; Mandatory CLE fee: \$20
Kentucky	\$310	\$310	Client protection fund fee: \$7; Building fund: \$20; Mandatory CLE fee: \$48; Lawyer assistance program fee: \$15; Legal services/legal aid/access to justice: \$2; Other: \$218 General Dues
Louisiana	\$435	\$200	Discipline system fee: \$235; Yearly Assessment: \$435 (\$200 licensing/registration annual dues membership plus \$235 Disciplinary assessment)
Maine	\$300	\$300	Client protection fund fee: \$20; Discipline system fee \$260; Lawyer assistance program fee: \$20
Maryland	\$130	\$130	Client protection fund fee: \$130
Massachusetts	\$220	\$300	N/A
Michigan	\$415	\$415	Client protection fund fee: \$15; Discipline system fee: \$140; Yearly Assessment: \$260 Annual Bar Dues
Minnesota	\$274	\$274	N/A
Mississippi	\$380	\$380	Other: \$380 Enrollment fee
Missouri	\$410	\$259	Discipline system fee: \$101; Legal services/legal aid/access to justice: \$50; Note: Discipline system fee and Legal Services fee are in addition to the licensing/registration fee. Inactive attorneys do not pay the Discipline system fee nor the Legal services fee, only \$100 per year for licensing/registration.
Montana	\$515	\$515	Client protection fund fee: \$20; Discipline system fee: \$125; Mandatory CLE fee: \$45; One-time Assessment: \$25 State Bar of Montana Supreme Court Licensing Tax; Other: \$300 Dues
Nebraska	\$98	\$98	Discipline system fee: \$60; Yearly Assessment: \$25; Other: \$13 Commission on the unauthorized practice of law
Nevada	\$450	\$450	Client protection fund fee: \$50; Other: \$450 Active license renewal fee (\$50 of the fee goes to client's security fund)
New Hampshire	\$615	\$615	Client protection fund fee: \$30; Discipline system fee: \$245; Lawyer assistance program fee: \$30; Yearly Assessment: \$310
New Jersey	\$267	\$267	Client protection fund fee: \$46; Discipline system fee: \$201; Lawyer assistance program fee: \$10; Other: \$6 Board of Examiners
New Mexico	\$440	\$275	Client protection fund fee: \$15; Discipline system fee: \$150
New York	\$187.50	\$187.50	Client protection fund fee: \$30; Legal services/legal aid/access to justice: \$12.50; Yearly Assessment: \$25 Indigent Legal Defense

State/District/Territory	Total Cost to Practice	*Highest Licensing/Reg. Fees	Cost to Practice Fees Breakdowns (If Known)
North Carolina	\$350	\$325	Mandatory CLE fee: \$25; Yearly Assessment: \$300 Annual State Bar membership fee; Note: For 2023 & 2024 members were not required to pay a client security fund assessment; however, that can change from year to year.
North Dakota	\$380	\$380	Client protection fund fee: \$16; Discipline system fee: \$75
Ohio	\$400	\$400	N/A
Oklahoma	\$275	\$275	N/A
**Oregon	\$688	\$688	Client protection fund fee: \$20; Mandatory professional liability insurance: \$3,300; Yearly Assessment: \$658; Other: \$10 Loan Repayment Assistance Program
Pennsylvania	\$275	\$195	Client protection fund fee: \$50; Discipline system fee: \$195; Other: \$30 IOLTA
Rhode Island	\$450	\$225	Client protection fund fee: \$25; Yearly Assessment: \$225 (dues range is \$140-\$225); Other: \$200 Court licensing fees
South Carolina	\$400	\$300	Client protection fund fee: \$30; Discipline system fund fee: \$70
South Dakota	\$540	\$540	Yearly Assessment: \$415; Mandatory CLE fee: \$125
Tennessee	\$570	\$170	Client protection fund fee: \$10; Discipline system fee: \$140; Lawyer assistance program fee: \$20
Texas	\$300	\$235	Legal services/legal aid/access to justice: \$65
Utah	\$435	\$425	Mandatory CLE fee: \$10; Yearly Assessment: \$425
Vermont	\$210	\$210	N/A
Virginia	\$285	\$250	Client protection fund fee: \$5; Lawyer assistance program fee: \$30; Yearly Assessment: \$250 Member Dues (\$250 Active Members or \$125 Associate Members)
Washington	\$478	\$478	Client protection fund fee: \$20; Yearly Assessment: \$458
West Virginia	\$250	\$250	N/A
Wisconsin	\$523	\$523	Client protection fund fee: \$25; Discipline system fee: \$150; Mandatory CLE fee: \$11; Legal services/legal aid/access to justice: \$50; Other: \$287 State Bar membership dues
Wyoming	\$355	\$350	Mandatory CLE fee: \$5

***Oregon - Total cost to practice excludes \$3,300 for mandatory professional liability insurance that covers malpractice claims for attorney's whose principal place of business is located in Oregon.*

TO: Washington State Bar Association Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Justin Bingham, Chair, WSBA Member Well-Being Task Force
Dan Crystal, WSBA Member Wellness Program Manager and Staff Liaison to the WSBA Member Well-Being Task Force
Adely Ruiz, WSBA Member Wellness Program Clinical and Outreach Lead and Staff Liaison to the WSBA Member Well-Being Task Force
Kevin Plachy, WSBA Advancement Department Director and Staff Liaison to the WSBA Member Well-Being Task Force

DATE: April 2, 2025

RE: Interim Report from the WSBA Member Well-Being Task Force to the Board of Governors

Interim Report on the WSBA Member Well-Being Task Force.

BACKGROUND

In November 2023 the Board of Governors (BOG) adopted four strategic priorities for FY24. One of those priorities was to study member well-being and expand and improve resources for and assistance to legal professionals and the legal community. In furtherance of this organizational priority, the BOG approved the charter for the WSBA Member Well-Being Task Force (MWTF) in January 2024 and approved the Presidential appointment of Justin Bingham as Chair of the taskforce. In March 2024 the BOG approved the Presidential appointments of MWTF members.

The MWTF consists of 11 members, with 10 additional ad hoc members recruited to support the workgroups.

The charter requires the MWTF provide an interim report to the BOG in May 2025 and quarterly updates to the Member Engagement Council (MEC). The MWTF provided quarterly updates to the MEC in July and December 2024 and in April 2025.

This interim report details the MWTF's accomplishments to date, including details on monthly meetings, the member survey, and significant work of the five workgroups.

ACCOMPLISHMENTS

FIRST QUARTER ACCOMPLISHMENTS

The MWTF held its first meeting on March 28, 2024. That meeting was focused on orienting the taskforce members to the WSBA, reviewing volunteer roles and responsibilities, discussing our collaboration tools and review of the charter and timeline for deliverables.

During the remainder of the first quarter, the MWTF held three more meetings on May 6th, June 3rd, and July 1st. During those meetings the taskforce received two presentations. The first presentation was from Kyra Hazilla from the Oregon Attorney Assistance Program. Kyra reviewed the Oregon Taskforce's report and their process in studying member wellbeing during the duration of their taskforce. The second presentation was from Heidi Alexander, Director of Massachusetts Supreme Judicial Court Standing Committee on Lawyer Well-Being. Heidi's presentation included a review of the Massachusetts report, the national lawyer well-being movement, and the Institute for Well Being in Law's (IWIL) work, as well as Massachusetts process in drafting its report.

In subsequent meetings, the MWTF decided to establish three "sprint workgroups." Two of the workgroups would run for approximately four months and the third survey development workgroup would work to develop the survey scheduled to deploy no later than March 2025. The three workgroups are as follows:

1. Private Practice Workgroup
2. Law Student/New Member Workgroup
3. Member Survey Workgroup.

Chair Bingham assigned task force members to the three workgroups and assigned a Chair for each workgroup:

Private Practice Workgroup: Chair Annasarra Purcell; Members: Melissa Berry, Darcel Lobo, Kyle Sciuchetti

Law Student/New Member Workgroup: Chair Susan Lee; Members: Bushra Rahim, Justice Raquel Montoya-Lewis,

Member Survey Workgroup: Chair Emily Arneson; Members: Laura Moss, Michael Finkle, Justin Bingham.

The MWTF is supported by three WSBA staff liaisons; Dan Crystal, WSBA Member Wellness Program Manager, Adely Ruiz, Clinical and Outreach Lead, and Kevin Plachy, Advancement Department Director. Dan, Adely and Kevin have each been assigned to support each of the three workgroups. Dan was assigned to the Private Practice Workgroup, Adely to the Law Student/New Member Workgroup and Kevin to the Member Survey Workgroup. The staff coordinate the workgroup meetings and attend each of the meetings as both substantive contributors and internal WSBA support.

SECOND QUARTER ACCOMPLISHMENTS

During its second quarter, the entire MWTF met three times, and the workgroups met regularly. During this quarter the Chairs of each of the workgroups worked with MWTF Chair Justin Bingham to appoint ad hoc members to serve on the workgroups.

In addition to the normal task force and workgroup meetings, several of the MWTF members attended the Oregon State Bar Association's Wellness Summit, which was held on November 8, 2024, at the Oregon State Bar offices.

The MWTF also received a presentation from Ryann Peyton, the Executive Director of the Colorado Attorney Mentoring Program (CAMP).

The three workgroups engaged in the following activities during the second quarter:

Private Practice Workgroup

Three ad hoc members were recruited to serve on the workgroup: Annasara Purcell, Melissa Jaffe and Aaron Paker. The Private Practice Workgroup met 8 times . During that time the workgroup organized a short well-being survey that was delivered to over 30 attorneys at WSBA's Solo Small Practice Conference. The workgroup also reviewed other state reports and discussed insights and perspectives of the members serving on the workgroup who represent small, medium, and large firms. The pressure points in legal practice described in the survey and in the research performed by the workgroup, informed this workgroup's recommendations to the Survey Workgroup. The results are also informing recommendations for the MWTF draft report. The workgroup also researched ideas for a Washington state Well-Being pledge and showed real interest in the example provided by Colorado's program.

Law Student/New Member Workgroup

Two ad hoc members were recruited to serve on the workgroup: Phillip Lentz, Clinical Psychologist at University of Washington Law School and Seattle University's Dean of Admission Gerald Heppler.

The Law Student/New Member Workgroup met nine times. During that time the workgroup focused on the groundwork that would inform the final questions to recommend for the member survey. The group reviewed literature on attorney wellness and engaged in open dialogue on how this correlates with stressors encountered by new members and law students.

The workgroup also reviewed a collection of surveys administered by other law schools. The workgroup ended their research with an internal questionnaire that they provided to University of Washington, Seattle University, and Gonzaga Law schools. After analyzing the responses provided, they made their final recommendations to the Survey Workgroup. The workgroup is concluding their work by focusing on recommendations they would like to see provided for new members and law students.

Member Survey Workgroup

Three ad hoc members were recruited to serve on the workgroup: Professor Matt Thiese, Miriam Korngold, and Sara Smucker-Barnwell.

The Member Survey Workgroup met five times. During that time the workgroup made significant progress on development of a member survey. Workgroup members had two meetings with NBRI to discuss logistical details and

a deployment schedule for the survey. The workgroup decided to deploy the survey in late January, and it will run for three weeks. The workgroup developed a plan for Professor Matt Thiese from the University of Utah to analyze the survey results and provide a comprehensive report to the MWTF.

Oregon State Bar Wellness Summit

To better inform itself on current well-being initiatives, a cohort of MWTF members attended the Oregon State Bar Wellness Summit on November 8, 2025. Chair Bingham, Melissa Berry, Kyle Sciuchetti, and Kevin Plachy all attended the summit in person. Darcel Lobo, Dan Crysall, and Adely Ruiz attended the summit remotely.

POST SECOND QUARTER ACCOMPLISHMENTS

Wrap up of First Three Workgroups and Establishment of Additional Workgroups

The Private Practice and Law Student/New Member Workgroups concluded their work at the end of December 2024. The Member Survey Workgroup will run through May 2025. Starting in May 2025 each of the workgroups will work on a final workgroup report to be provided to Chair Bingham by June 27, 2025.

Starting in January 2025, two new workgroups were established. The two new workgroups are Suicide and Addiction and Government/Public Interest. These two workgroups will run through May 2025.

The members of each of the new workgroups and their activities to date are provided below.

Suicide and Addiction Workgroup

Members include Chair Emily Arneson, Bushra Rahim, Sara Smucker Barnwell, Susan Lee, and Laura Moss. Ad hoc members recruited to serve on the workgroup include Aaron Paker, Annasara Purcell, and Jenn Stuber. Dan Crystal is serving as a staff liaison to the workgroup.

Where other workgroups explore a domain of the legal profession, this group sought to address issues seen throughout the profession. Jenn Stuber is a suicidologist at the University of Washington, so her expertise was specifically sought out to guide the work. This group's focus at this point is the deployment of a short questionnaire related specifically to suicide and addiction that would be shared to myriad sections, affinity bars, county bar associations, and emailed to all attorneys through WSBA's newsletter Take Note. The workgroup is also reviewing research relevant to suicide and addiction in the legal profession. Once the suicide/addiction questionnaire results are received the workgroup will examine the results along with the results from the primary member survey and develop recommendations.

Government/Public Interest Workgroup

Members include Chair, Judge Michael Finkle, Justin Bingham, Melissa Berry, Darcel Lobo, Kyle Sciuchetti, and Justice Raquel Montoya-Lewis. Ad hoc members include Marci Comeau and Marlene Otero. Adely Ruiz and Kevin Plachy are serving as staff liaisons to the workgroup.

During their first meeting the workgroup established norms and discussed the appointment of ad-hoc members that have knowledge and expertise in government and legal aid practice. Once the workgroup was fully staffed, members began to discuss their own struggles and/or knowledge on negative and stigmatizing experiences in government and legal aid practice.

The workgroup diligently sought to identify research that could further validate their experiences and discovered there was a limited amount of data speaking to these issues. With this discovery, the workgroup members decided to develop their own questionnaire to gain more knowledge on the impacts of an attorney's well-being in government and public interest practice. The questionnaire was sent to various stakeholders on March 20th with a request to return responses by April 15th. During review of the results from the industry specific questionnaire and the general membership survey, workgroup members intend to formulate recommendations that will improve the practice of well-being for government and legal aid attorneys.

Future Workgroups

Three new workgroups will be established in July 2025. They are Diversity, Equity and Inclusion and Well-Being, Judicial Rules and Regulatory, and Lawyer Assistance Programs. These final workgroups will run through November 2025.

All the workgroups are required to submit a final workgroup report to the Chair and those final workgroup reports will provide the information for the Final Report which is due to the Board of Governors in March 2026.

At the March Task Force meeting Leslie Hagin provided a presentation. Leslie is a WSBA member and recently founded Washington's non-profit group Washington Lawyers Assisting Lawyers. Her group is actively providing Peer Counseling and trainings to Washington attorneys. She spoke about her own recovery from addiction and the incidence of alcoholism and mental health challenges in the legal profession.

MEMBER SURVEY

On January 28, 2025, the task force deployed a survey to 10,000 WSBA members to understand the relative well-being of members, the identification of challenges in various sectors of legal practice, the occurrence of mental health conditions or illness, and suggestions for the Task Force. The survey closed on February 20, 2025, and the Task Force received the raw survey results from NBRI shortly after the survey closed. WSBA contracted with Matt Thiese, a Professor from University of Utah to analyze the data from the survey and create a final survey report to the Task Force. Professor Thiese will provide the final survey report to the Task Force at the April meeting.

Survey Methodology

- Conducted by NBRI for WSBA,
- Survey period: January 28 – February 20, 2025,
- Total responses: 903 members (9% response rate),
- 99.84% confidence level with a 5% margin of error,

The raw data from the survey along with the comments from respondents are provided in the attachments to this update. After the Task Force receives the final survey report and analysis from Professor Thiese we will review the results and integrate them into our final workgroup reports and the final report to the Board of Governors.

CONCLUSION

The Task Force remains on track according to the charter and “Timeline of Deliverables”. The Task Force will continue meeting monthly, analyzing the results of the member survey to guide recommendations and future workgroup activities, and preparing the final report, due to the BOG in March 2026. The Task Force extends its thanks to the BOG for the opportunity to take the lead on this critical WSBA strategic priority.

ATTACHMENTS

- WSBA Member Well-Being Task Force Charter
- Timeline of Task Force Deliverables
- Meeting Agendas – March 2024 to April 2025
- Meeting Minutes – March 2024 to March 2025
- Workgroup Reports/Working Documents— Private Practice, Law Student/New Member, Survey, Government/Public Interest, and Suicide/Addiction Workgroups
- NBRI Raw Member Survey Information

CHARTER

Well-Being Task Force

Adopted: January 12, 2024.

Background

The Task Force seeks to (1) study well-being among WSBA members and the broader legal community in Washington and (2) make recommendations to enhance well-being for those same individuals and thereby improve the provision of legal services.

The Task Force will draw on the considerable and influential existing body of work compiled by national and state legal organizations, most prominently [*The Path to Lawyer Well-Being: Practical Recommendations for Positive Change*](#), authored by the National Task Force on Lawyer Well-Being, a coalition of organizations including the National Organization of Bar Counsel (NOBC), the Association of Professional Responsibility Lawyers (APRL) and the [*American Bar Association's Commission on Lawyer Assistance Programs*](#) (CoLAP). Following publication of the report in 2017, both the ABA and the Conference of Chief Justices passed resolutions urging all states to review and consider the report's 44 recommendations. Subsequently, 26 states have formed well-being committees and another eight states have held well-being conventions or "summits."

In November 2023, at the recommendation of the Member Engagement Council (MEC), the WSBA Board of Governors (BOG) voted to adopt member wellness as an organizational priority. Creating a Well-Being Task Force (which was also part of the MEC's recommendation) is the first step in acting on that priority.

Task Force Objectives

The Task Force's primary objective will be to create a report synthesizing the Task Force's research and recommending tangible steps WSBA can take to enhance well-being among WSBA members and the broader legal community in Washington. This objective will be achieved by accomplishing two subsidiary objectives:

1. Create Workgroups to Research Well-Being Across the Various Sectors of the Legal Profession in Washington and the U.S.

By the end of its second meeting, the Task Force will establish multiple workgroups to research well-being across various sectors of the legal profession. The workgroups will be comprised of Task Force members and additional non-voting members if desired, such as WSBA employees and members of relevant associations (e.g., Superior Court Judges Association, District and Municipal Court Judges Association, and Appellate Judges Association). The workgroup members will be appointed by the Chair of the Task Force, with consent of a majority of the task force members.

Each workgroup will focus on one or more sectors of the legal profession, with the goal of bringing recommendations to the Task Force of how to raise awareness and/or prioritize well-being within those sectors. Examples of sectors could include types of practice (e.g., private practice, in-house, judiciary, public/government practice), law schools/law clerk programs, member wellness programs, professional

liability insurance carriers, and professional regulatory systems.¹ Topics of workgroup focus could include substance use, structural and systemic oppression, student loan challenges, marginalization and experiences of othering, discrimination or bias, balancing work and family life, the impact of remote work, and other concerns. The foregoing examples of sectors and topics are not exhaustive, and the term “sectors of the profession” should be interpreted broadly.

Workgroups will be tasked with:

- recruiting relevant contributors, both within the profession, and outside of the profession, to participate in each workgroup’s research;
- conducting outreach to and receiving feedback from sectors of the profession relevant to the workgroup;
- reviewing well-being recommendations nationwide and determining which appear most relevant to legal practice in Washington;
- understanding the state of research regarding mental health; and
- providing a final report to the full Task Force, containing its findings and recommendations.

2. Create a Workgroup to Investigate Well-Being Among WSBA Members

The Task Force will also form a workgroup to investigate well-being among WSBA members. This workgroup’s primary goal will be to develop and deploy a member survey by no later than the end of the Task Force’s first year. Areas of inquiry for the survey may include the relative well-being of members, the identification of challenges in legal practice, the occurrence of mental health conditions or illness, and suggestions for the Task Force. The workgroup may also solicit member feedback through listening sessions, focus groups, and other forms of interaction. The workgroup will provide a final report to the full Task Force, containing its findings and recommendations.

Timeline

The Task Force will have a duration of two years from the date of its first meeting and will meet monthly or at other intervals determined to be appropriate by the Chair. The Task Force will provide quarterly reports to the Member Engagement Council, an interim written report to the Board after its first year of operation, and a final report to the Board at conclusion of its two-year duration. The Task Force may also report to the Member Engagement Council or the Board on an interlocutory basis if urgent issues arise.

¹ In adopting this Charter, the Board of Governors recognizes that Washington State’s professional regulatory systems for legal practitioners are created by and answerable to the Washington Supreme Court exclusively. To the extent the Task Force has ideas or recommendations that would implicate regulatory processes, procedures, policies, or rules, the Task Force should work collaboratively with the pertinent stakeholder(s) and direct any recommendations to the appropriate regulatory staff or board, the Disciplinary Advisory Round Table, and/or the Supreme Court.

Composition

The Task Force shall consist of nine voting members and two non-voting judicial members, as follows:

- Chair (voting)
- 1 Current or Former BOG Member (voting)
- 4 WSBA Members (voting)
- 1 Member of the State Supreme Court (non-voting)
- 1 Adjudicative Officer in Washington State (non-voting)
- 1 Law School Representative (student or employee; voting)
- 2 Public Members (voting)

Further membership criteria is detailed in the appendix below.

Nominations and Appointment

Except for the State Supreme Court member, who will be determined by the Supreme Court, the WSBA President will appoint Task Force members in accordance with WSBA Bylaws Art. IX.B.2 taking into account the recommendation of the Co-Chairs of the Member Engagement Council. The President shall appoint the Task Force Chair taking into account the recommendation of the Co-Chairs of the Member Engagement Council. The WSBA Executive Director will designate the WSBA staff liaison(s).

Terms

Task Force members will serve for the two-year duration of the Task Force. The WSBA President will appoint any replacement members (if necessary) taking into account the recommendation of the Co-Chairs of the Member Engagement Council.

Final Report

At the end of its duration, the Well-Being Task Force will issue a final report to the Board of Governors. The report will (1) evaluate the scope and efficacy of the Task Force's achievements, and (2) provide feasible recommendations to improve well-being within the legal profession in Washington State.

APPENDIX

The following non-exclusive criteria shall be prioritized for membership on the Task Force:

Practice Types and Venues

The Task Force seeks participation from attorneys from various practice types and venues. Solo attorney participation will be important to prioritize the pressure they face in running their business, marketing, and having support staff to help manage their client base. Attorneys in mid-size or large firm settings face very different wellness challenges in keeping up their billable hour requirements and responding to management pressures upon their performance. Civil legal aid lawyers and public defenders face challenges of secondary trauma from working with clients who experience poverty and other forms of oppression. Government attorneys face challenges with unique bureaucratic responsibilities, and in house counsel face the demands of the companies they support.

Years of Bar Licensure

The Task Force seeks participation from attorneys at all stages of their careers. Early career attorneys face major pressures as they adapt to a profession that they were typically not trained for in law school. Mid-career attorneys often struggle with transitioning to a more hospitable work environment or to use a skill set more to their liking. Late career attorneys handle the question of when to retire and to manage, in some cases, changes in mental capacity.

Experience or Interest in Well-Being

The Task Force seeks participation from legal professionals with an interest in enhancing the well-being of the profession. Those who have original insights into what they think legal professionals need to feel more engaged and at ease will be prioritized. Those with volunteer experiences or connection to mental health venues will also be an asset.

Mental Health Professionals

The Task Force seeks participation from experienced mental health professionals who are not lawyers but have familiarity with the legal profession. Their expertise will inform the Task Force's recommendations and decision making.

Diversity, Equity, and Inclusion

The Task Force seeks participation from people from marginalized communities (e.g., people of color, people from the LGBTQ2S+ community, people with disabilities). Having a diverse group of members is vital to promote diversity, equity and inclusion goals, particularly given that these communities disproportionately experience mental health challenges and other wellness-related issues due to historical and ongoing marginalization, discrimination, access to healthcare, and other reasons.

Geography

Geography The Task Force seeks participation from legal professionals and others throughout Washington to ensure consideration of wellness issues in all parts of the state , with particular attention to the different issues in rural and urban areas. To obtain geographic diversity, at least two Task Force members

**Well-Being Task Force
Charter**

must reside east of the Cascades and at least one other member must reside outside of King, Pierce, and Snohomish Counties.

Member Wellbeing Taskforce Timeline for Deliverables

Workgroup Timelines:

Private Practice and Law Student Workgroups (Duration June 2024 through December 20, 2024 and reconvene in June 2025 to finalize workgroup report) :

- **Ad-Hoc Members:** Up to three identified ASAP.
- **Verbal Progress Update:** To be delivered monthly at the full taskforce meeting.
- **Draft Survey Questions:** Delivered to the Survey Workgroup by September 30, 2024. Recommend 5-10 questions and rank them in order of preference. The length of the survey is limited so final decisions on selected questions will be made by the Survey Workgroup taking into consideration the stated preferences of the workgroup.
- **Written Update:** to entire TF due to Chair by **September 30th**. This update does not need to be formal. A page long update outlining work plan, outreach/research methods, and progress towards the formulation of recommendations will suffice.
- **Written “Formal Interim” Report** due to Chair by **December 20, 2024** .
- **Workgroups Go on Hiatus.**
- **Workgroups Will Reconvene in Mid-April to May 2025 to Finalize Workgroup Report after Receipt of Survey Results on April 7th:** Finalize Workgroup Report by June 27th, 2025.

Timeline for Survey Workgroup (Duration June 2024 to June 2025):

- **Ad-Hoc Members:** Up to three identified ASAP.
- **Verbal Progress Update:** To be delivered monthly at the full taskforce meeting.
- **Determine Survey Domains and Plan for Data Analysis:** By September 30th.
- **Draft of Survey to Chair:** By October 28th.
- **Initial Review of Draft Survey by Full Taskforce:** At the November 4th meeting.
- **Finalize Survey Questions, Confirm Plan for Data Analysis and Review with NBRI:** By November 29th.
- **Final Review by Taskforce Members (could occur at Dec. meeting or over Email):** By December 9th.
- **Submit Final Survey Questions to NBRI:** By December 20th.
- **Deploy Survey:** On January 13th.

- **Close Survey:** On February 7th.
- **Receive Survey Results from NBRI:** By February 14th.
- **Perform Data Analysis and Review with Survey Workgroup (Matt):** At March 10th Survey Workgroup Meeting.
- **Formal Presentation of Survey Results with Entire Taskforce:** April 7th Meeting.
- **Draft Final Workgroup Report:** By June 27th.

Suicide – Addiction - Burnout / Judicial - Rules – Regulatory Workgroups (Duration January 2025 to May 2025):

Note: The Survey Workgroup will still be going at this time so the members of the taskforce not serving on the Survey Workgroup should be appointed to these two workgroups.

- **Ad-Hoc Members:** Up to three identified ASAP.
- **Verbal Progress Update:** To be delivered monthly at the full taskforce meeting.
- **Written Update:** to entire TF due to Chair by **March 28, 2025**. This update does not need to be formal. A page long update outlining work plan, outreach/research methods, and progress towards the formulation of recommendations will suffice.

Final Workgroup Report Writing:

- During the month of June, the two workgroups (and the Private Practice and Law Student/New Member Workgroups) will work on report writing with the objective of producing Final Reports by **June 27, 2025**.
- Final workgroup reports will be reviewed at the July full taskforce meeting.

DEI and Well-Being / Government – Legal Aid / LAP – Member Wellness Programs Workgroups (Duration July 2025 to November 2025)

- **Ad-Hoc Members:** Up to three identified ASAP.
- **Verbal Progress Update:** To be delivered monthly at the full taskforce meeting.
- **Written Update:** to entire TF due to Chair by **September 26, 2025**. This update does not need to be formal. A page long update outlining work plan, outreach/research methods, and progress towards the formulation of recommendations will suffice.

Final Workgroup Report Writing:

- During the month of December, the three workgroups will work on report writing with the objective of producing Final Reports by **December 30, 2025**.
- Final workgroup reports will be reviewed at the January full taskforce meeting.

Full Taskforce Timelines:

Updates to Member Engagement Council:

- **November 2024 (Exact Date TBD)**
- **February 2025 (Exact Date TBD)**
- **May 2025 (Exact Date TBD)**
- **August 2025 (Exact Date TBD)**
- **November 2025 (Exact Date TBD)**
- **February 2026 (Exact Date TBD).**

Interim BOG Report Writing (Kevin, Dan, and Adely can work on this report) :

- Interim BOG report is less formal than the final report. It will consist of a Memo to the Board of Governors breaking down the work that has been completed along with attachments of the actual work (i.e. interim reports from Private Practice and Law Students/New Member workgroups, member survey results, charters for the ongoing workgroups) and an explanation of the ongoing work.
- A draft of the Interim BOG Report should be delivered to the Chair by **February 24, 2025.**
- Draft of the report will be reviewed by the full taskforce at the **March 3rd** meeting.
- Final Interim BOG Report due to the Chair by **March 31, 2024.**
- Final report to be reviewed by entire taskforce at **April 7th meeting.**
- Submit final report for BOG meeting materials on **April 8th.**
- Deliver report to the BOG at the **May 2-3, 2025, BOG Meeting.**

Final BOG Taskforce Report Writing Workgroup (Duration January 2026 through March 2026):

- Deliver first draft of report to Chair by **January 26, 2026.**
- Review first draft with full taskforce at **February meeting.**
- Deliver final draft of report to Chair by **February 20, 2026.**
- Review final draft with full taskforce at **March meeting.**
- Work with WSBA Communications to finalize WSBA branded report by **March 31, 2026.**
- Deliver at next BOG meeting after March 31, 2026.

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Inaugural Meeting Agenda

March 28, 2024, 3:00-5:00pm

[Zoom - Remote Meeting](#)

Zoom Conference Call Line: (253) 215-8782 Meeting ID: 834 5772 2618 || Passcode: 350121

[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Jenn Stuber, Anna Endter, Ghousia Rahim, Michael Finkle, Laura Moss,

WSBA Staff Present: Dan Crystal, Adely Ruiz, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

- Welcome. Summary of meeting Agenda. (Justin, 5 min)
- Introductions. Why is well-being in the legal profession a personal mission? (25 min)
- Volunteer Roles and Responsibilities (Dan, 10 min)
 - Bylaws
 - Committees and Boards Policies
 - Open Meetings and Public Records Requests
 - Roles of liaisons. Framework for communicating.
- Reviewing the charter. Framework for handling meetings. (Justin, 10 min)
 - Scheduling, frequency
 - Rules for Group Process
 - Describing workgroups and the survey.
- Introduction to the Member Wellness Program (Adely, 10 min)
- The Well-Being in Law Movement (Dan, 15 min)
 - The Path to Lawyer Well-Being
 - The Well-Being Pledge
 - IWIL
 - Michigan Report
 - Taskforce Victories
- Discussion of Taskforce priorities (15 min, time permitting)
- Adjourn

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Agenda

May 6, 2024-4-5:30pm- [Zoom link here](#)

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442
[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Jenn Stuber, Anna Endter, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss.

WSBA Staff Present: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

- Welcome. (Justin, 10 minutes)
 - Summary of meeting Agenda.
 - Approval of previous meeting's minutes.
 - Confirmation of schedule for future meetings.
- Introductions. Those who could not attend the previous meeting can share why Attorney Well-Being is important to them. (Darcel, Anna, Jenn--15 min)
- Kyra Hazila, JD, LCSW Oregon Attorney Assistance Program (20 minutes)
 - Will discuss Oregon's report included in reading materials this week.
- Workgroup discussion. Identification of topics, number of workgroups, and composition of workgroups. (Justin, 40 min)
- Adjourn

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Agenda

June 3, 2024-4-5:30pm- [Zoom link here](#)

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442
[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Jenn Stuber, Anna Endter, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss. BOG Liaison Nam Nguyen WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

- Welcome. (Justin, 10 minutes)
 - Summary of meeting Agenda.
 - Approval of last meeting's minutes.
 - New Law Student Representative Susan Lee.
 - BOG Liaison Nam Nguyen
- Heidi Alexander, Director of Massachusetts SJC Standing Committee on Lawyer Well-Being (30 minutes)
 - Will discuss explore the national lawyer well-being movement and IWIL's work, as well as Massachusetts process in drafting its report.
- Workgroup discussion. Feedback about workgroup preferences based upon these initial assignments. (Justin, 50 min)
 - Identification of workgroup chairs.
 - Will also discuss using multiple zooms for the next meeting.
- Adjourn

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Agenda

July 1, 2024-4-5:30pm- [Zoom link here](#)

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442

[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Jenn Stuber, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss. BOG Liaison Nam Nguyen WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin, 10 minutes)

- Summary of meeting Agenda.
- Approval of last meeting's minutes.
- Guidance on Workgroup process and objectives for the breakouts.

Breakout Rooms for Workgroups (50 minutes)

- Identify a time to meet each month, including a July date
- Identify three WSBA contributors
- Reflect on personal priorities as it pertains to the workgroups.
- Identify useful experts in these domains to inform the conversation.

Group Discussion (30 minutes)

- Reporting out about workgroup discussions.
- Group process about the direction of the Taskforce

Adjourn

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Agenda

August 5, 2024-4-5:30pm- [Zoom link here](#)

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442
[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss. BOG Liaison: Nam Nguyen. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin, 10 minutes)

- Welcome Law School Interns Elaine McDaniel (SU) and Selena Liu (UW)
- Approval of last meeting's minutes.
- Replacing Taskforce member.
- Introduce ad hoc members present and identifying the roles of ad hoc members vs. Taskforce members.
- Timelines for reports from Workgroups.
- Identifying writers for report writing.

Breakout Rooms for Workgroups (60 minutes)

- Confirming meeting times.
- Identifying report writers.
- Reflecting upon the merits of the assigned reading.
- Identify useful experts in these domains to inform the conversation.

Group Discussion (20 minutes)

- Reporting out about workgroup discussions.
- Group process about the direction of the Taskforce

Adjourn

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

Well-Being Taskforce Monthly Meeting Agenda

September 9, 2024-4-5:30pm- [Zoom link here](#)

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442
[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Nam Nguyen. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin, 20 minutes)

- Introducing Taskforce member Sara Smucker Barnwell
- Approval of last meeting's minutes
- State Recommendations memo: research methods and recommendations from OR, CO, NY and MA.
- Taskforce Timelines memo: workgroups research, recommendations, and interim reports.
- Workgroup research: Identifying questions for the survey and focus groups.

Breakout Rooms for Workgroups (50 minutes)

- Confirming meeting times
- Review timeline for deliverables
- Review of research methods and questions
- Discuss recommended questions for the survey
- Discuss recommendations for the report

Group Discussion (20 minutes)

- Reporting out from workgroup discussions
- Group process about the direction of the Taskforce

Adjourn

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Agenda

October 14, 2024-4-5:30pm- [Zoom link here](#)

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442
[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin, 10 minutes)

- Acknowledgment that this meeting is during Indigenous Peoples/Columbus Day.
- Approval of last meeting's minutes
- Oregon's Wellness Summit
- Discuss status of survey questions from workgroups.

Breakout Rooms for Workgroups (60 minutes)

- Review timeline for deliverables
- Discuss recommended questions for the survey
- Discuss research and recommendations for the report

Group Discussion (20 minutes)

- Reporting out from workgroup discussions
- Group process about the direction of the Taskforce

Adjourn

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Agenda

November 4, 2024-4-5:30pm- [Zoom link here](#)

Zoom phone#: (253) 215-8782 Meeting ID: 815 4476 4463 || Passcode: 720331
[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin, 10 minutes)

- Approval of last meeting's minutes
- Oregon's [Wellness Summit](#) 11/8
- [Illinois report](#) on bullying in the legal profession.
- Feedback on WSBA Equity and Justice Plan
- The next two workgroups: 1. Government and Legal Aid 2. Suicide and Addiction
- Setting agenda for Workgroups report writing

Guest Speaker Ryann Peyton from the Colorado Attorney Mentoring Program (CAMP)-(30 minutes)

Breakout Rooms for Workgroups (40 minutes)

- Review timeline for deliverables
- Discuss research and recommendations for the report
- Assign writing roles to members

Group Discussion (10 minutes)

- Brief reporting out from workgroup discussions

Adjourn

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

Well-Being Taskforce Monthly Meeting Agenda

December 2, 2024-4-5:30pm- [Zoom link here](#)

Zoom phone#: (253) 215-8782 Meeting ID: 824 4373 0929 || Passcode: 556585
[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin, 10-15 minutes)

- Approval of last meeting's [minutes](#)
- Oregon's [Wellness Summit](#)
- Next month's meeting on 1/13 at 4
- The next two workgroups planning: 1. Government and Legal Aid 2. Suicide and Addiction
- Providing feedback to the survey group (Emily)
- Setting agenda for Workgroups report writing

Breakout Rooms for Workgroups (55 minutes)

- Review timeline for deliverables
- Discuss research and recommendations for the report
- Assign writing roles to members

Group Discussion (20 minutes)

- Brief reporting out from workgroup discussions

Adjourn

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Agenda

January 13, 2025-4-5:30pm- [Zoom link here](#)

[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin)

- Approval of last meeting's [minutes](#)
- Status of Survey (Emily)
- Timeline for previous workgroups reconvening to finish reports.
- The next two workgroups planning: 1. Government and Legal Aid 2. Suicide and Addiction

Breakout Rooms for Workgroups (45 minutes)

- Discuss individual priorities as they relate to these workgroups
- Brief discussion of state reports relevant to each workgroup
- Schedule a time to meet outside of the Taskforce meeting
- Review timeline for deliverables

Group Discussion (20 minutes)

- Brief reporting out from workgroup discussions

Adjourn

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Agenda

February 3, 2025-4-5:30pm- [Zoom link here](#)

[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin 10 min)

- Approval of last meeting's [minutes](#)
- Introduction of ad hoc members: Jenn Stuber, Aaron Paker (returning), Annasara Purcell (returning), Marci Comeau, and Marlene Otero

Breakout Rooms for Workgroups (55 minutes)

- Confirm meeting schedule
- Create a timeline for surveys (if applicable), speakers, and report writing.

Group Discussion (15 minutes)

- Brief reporting out from workgroup discussions

Adjourn

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Agenda

March 3, 2025-4-5:30pm- [Zoom link here](#)

[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. **BOG Liaison:** Allison Widney. **WSBA Staff:** Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin 10 min)

- Approval of last meeting's [minutes](#)
- Survey updates
- Time frame for workgroups

Guest Speaker: Leslie Hagin from Washington Lawyers Assisting Lawyers
(15 minutes + questions)

Breakout Rooms for Workgroups (40 minutes)

- Confirm meeting schedule
- Create a timeline for surveys (if applicable), speakers, and report writing.

Group Discussion (15 minutes)

- Brief reporting out from workgroup discussions

Adjourn

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

Well-Being Taskforce Monthly Meeting Agenda

April 7, 2025-4-5:30pm- [Zoom link here](#)

[Website](#), [SharePoint](#)

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin 15 min)

- Approval of last meeting's [minutes](#)
- Survey updates
- Annual report to BOG
- Time frame for workgroups

Breakout Rooms for Workgroups (60 minutes)

- Create a timeline for surveys (if applicable), speakers, and report writing.

Group Discussion (15 minutes)

- Brief reporting out from workgroup discussions

Adjourn

WASHINGTON STATE BAR ASSOCIATION

Draft Well-Being Taskforce Inaugural Meeting Minutes

March 28, 2024, 3:00-5:00pm, hosted on Zoom

Attendance: Justin Bingham, Judge Michael Finkle, Emily Arneson, Melissa Berry, Kyle Sciuchetti, Laura Moss, Ghousia Bushra Rahim

WSBA Staff Present: Dan Crystal, Adely Ruiz, Kevin Plachy

Absent: Darcel Lobo, Jenn Stuber, Anna Endter

Meeting Minutes

- Welcome. Summary of meeting Agenda. (Justin, 5 min)
 - Discussed value of Well-being in the profession
 - Their passion for WBT
- Introductions. Why is well-being in the legal profession a personal mission? (25 min)
- Reviewed Volunteer Roles and Responsibilities (Dan, 10 min)
 - Bylaws, Committees and Boards Policies, Open Meetings and Public Records Requests, Roles of liaisons. Framework for communicating.
- Reviewing the charter. Framework for handling meetings. (Justin, 10 min)
 - Scheduling, frequency
 - Kyle S. cannot meet on last Thursday of the month
 - Judge Michael F. lunch hour or Monday afternoons around 3:30pm
 - Emily A. flexible except for Wednesdays during lunch hour; prefers early morning
 - Melissa B. Monday Afternoons after 3pm generally work; can make early morning work
 - Dr. Moss; 7:30am Mon, Tue, not available on Monday afternoons
 - Bushra; Monday afternoon at 3:30 and Monday early in the morning
 - Rules for Group Process
 - Establishing meeting style
 - Informal but formal for motions and decisions required of the group
 - Describing workgroups and the survey.

- Kevin P- noted that workgroups do allow ad hoc members; this can be a resource to our workgroups
- Introduction to the Member Wellness Program (Adely, 10 min)
- The Well-Being in Law Movement (Dan, 15 min)
 - The Path to Lawyer Well-Being, The Well-Being Pledge, IWIL, Michigan Report, Taskforce Victories
- Priorities for our next meeting
 - Meeting poll to establish time availability
 - What are the taskforce priorities that we should focus on
 - Topics for our workgroups
- Adjourned (4:56pm)

New business

- Everyone establishing their idea of workgroups and what their focus should be based on what the charter is stating
- Respond to Meeting poll survey to establish next meetings
- Everyone considering task force priorities

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Minutes

May 6, 2024 Hosted on Zoom

Attendance: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Jenn Stuber, Anna Endter, Ghousia Rahim, Raquel Montoya-Lewis, Laura Moss.

WSBA Staff Present: Adely Ruiz & Dan Crystal

Absent: Judge Michael Finkle

Final Meeting Minutes

- A motion to approve the minutes of meeting on March 28th, 2024 was made by Kyle Sciuchetti Emily Arneson motioned second
 - Darcel Lobo, Ana Endter, Justice Montoya-Lewis abstained as they were not present at last meeting
 - All other voting members approved
 - Confirmation of schedule for future meetings.
 - Consensus that meetings will occur first Monday of the month
 - Next meeting June 3rd
- Introductions. Those who could not attend the previous meeting can share why Attorney Well-Being is important to them. (Justice Montoya-Lewis, Darcel Lobo, Anna Endter, Jennifer Stuber)
- Kyra Hazilla, JD, LCSW Oregon Attorney Assistance Program (20 minutes)
 - Discussed Oregon's report included in reading materials this week.
 - Group formation occurred through recruiting all different types of attorneys in the state (firms, solos, bar affinities)
 - Alot of the recruitment was done through personal invitations
 - Task Force members had personal stories and connection to the well-being efforts
 - Due to sufficient resources in the Oregon-LAP program there was an opportunity to focus on other areas of the law that can improve lawyer well-being
 - Q&A with members

- Size of workgroups
 - Established 4 work groups
 - Topics can be combined in order to make them manageable
- Structure of work groups
 - Assigned task force members as the core leaders
 - Recruiting volunteers to also help with the work
- How to work with Trauma that may show
 - Recommendation to read Trauma Stewardship by Laura Vandernoot Lipsky
- What happens beyond the report in order to ensure things are put into action
 - Continued establishing small groups that are continuing to review the work
- Workgroup discussion. Identification of topics, number of workgroups, and composition of workgroups. (Justin, 40 min)
 - Kevin Plachy clarified who Task Force members will submit their report (Board of Governors) to and limitations they have to enforce change that Task Force may recommend
 - Topics of consideration
 - Ethics and Wellness
 - Focus on Law students
 - Vicarious Trauma
 - Workplace well-being
 - Focusing on disparities experienced by people of color and LGBTQ community
 - Helping new lawyers' transition
 - DEI involvement intertwined in all the work
- Volunteer recruitment
 - Working with sections, eblast
 - Largest recruitment will occur through summit

- How to engage volunteers into the dialogue
- Justin Bingham adjourned meeting at 5:33pm

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Minutes

Monday June 6, 2024 Hosted on Zoom

Taskforce Members: Justin Bingham (Chair), Michael Finkle, Darcel Lobo, Emily Arneson, Ghousia Rahim, Melissa Berry, Susan Lee, Laura Moss, Raquel Montoya-Lewis

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Absent: Kyle Sciuchetti, Jenn Stuber, BOG Liaison Nam Nguyen

Guest speaker: Heidi Alexander

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Minutes

- Summary of meeting Agenda.
- A motion to approve the minutes from May 6th, 2024, was made by Emily Arneson with the amendment to correct spelling of Emily's last name. Melissa Berry motioned 2nd all other voting members approved
 - Judge Michael Finkle and Susan Lee abstained due to their absence during May meeting
- Introduce new Law Student representative Susan Lee.
- BOG Liaison Nam Nguyen
 - Kevin Plachy spoke to Nam's experience and interest in the Well-being Taskforce
- Heidi Alexander, Director of Massachusetts SJC Standing Committee on Lawyer Well-Being
 - discussed the national lawyer well-being movement and IWIL's work, as well as Massachusetts process in drafting its report.
 - Offered an understanding that there is a need for resources staff and budget to move any recommendation made in the report forward
 - Provided information on evaluation methods
 - Discussed services that have been implemented as a result of their report
- Workgroup discussion. Feedback about workgroup preferences based upon these initial assignments.
 - Identification of workgroup chairs.
 - Discussed and asked for feedback on grouping of people and assigned workgroup topics that Justin created with WSBA staff liaisons and Kevin Plachy
 - Emily Arneson asked there be separate workgroup specifically looking at mental health

- Judge Michael Finkle offered their expertise in mental health and desire to participate
- Melissa Berry, Darcel Lobo asked for clarification on the role of the workgroups
 - Dan Crystal and Kevin Plachy provided clarification
- Justin Bingham discussed bringing on volunteers for workgroups
 - Melissa Berry discussed concern around logistics of meeting times and the structure of meetings moving forward if there will be inclusion of volunteers amongst the workgroups
- Laura Moss asked there be an invite in order to rally volunteers
- Adjourned at 5:40PM

New Business

- Members are to forward an email to Justin, Dan, and Adely confirming the following
 - approval of their assignment in workgroups
 - Express interest if there is a desire to be appointed as the chair to the workgroup
 - Discuss outreach in options in order to rally up volunteers from the workgroup

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Inaugural Meeting Minutes

July 1st, 2024, 4:00pm- Hosted on Zoom

Attended: Justin Bingham (Chair), Michael Finkle, Darcel Lobo, Emily Arneson, Ghousia Rahim, Melissa Berry, Susan Lee, Laura Moss, Kyle Sciuchetti

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy,

Absent: Jenn Stuber, Raquel Montoya-Lewis, BOG Liaison Nam Nguyen

Minutes

- Summary of meeting agenda
- Motion to approve the June meetings minutes was made by Bushra Rahim. The motion was seconded by Darcel Lobo. The motion passed.
 - Kyle Sciuchetti requested the minutes be amended to correct the spelling of his last name.
 - Judge Finkle and Kyle Sciuchetti abstained due to their absence at the June meeting.
- Breakout Rooms for Workgroups (50 minutes)
 - Groups reported out the following:
 - 1) Meeting times for their respective work group
 - 2) Contributors that can assist with their workgroup
 - i. three WSBA contributors
 - ii. Useful experts in these domains to inform the conversation.
 - 3) Reflections on personal priorities as it pertains to the workgroups.
- Recommendations for work group process were made. WSBA staff has offered to assist the workgroups.
- Adjourn 5:30pm
- August 5th next meeting

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Meeting Minutes

August 5th , 2024, 4:00pm- Hosted on Zoom

Task Force members in attendance: Justin Bingham (Chair), Michael Finkle, Darcel Lobo, Emily Arneson, Ghousia Rahim, Melissa Berry, Susan Lee, Laura Moss, Kyle Sciuchetti,

Absent: Raquel Montoya- Lewis,

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy, BOG Liaison Nam Gyuen

Others: Dan Crystal, Kevin Plachy, Adely Ruiz, Aaron Paker, Philip Lentz, Melissa Jaffe, Annasara Purcell, Miriam Korngold, Selena Liu, Elaine McDaniel

Minutes

- Summary of meeting agenda provided by chair, Justin Bingham
- Motion to approve August meeting minutes
 - Kyle Sciuchetti motioned; Susan Lee motioned seconded the motion
 - Motion passed without opposition
- Ad hoc members were introduced. Roles of ad hoc members vs. taskforce members was discussed.
- Timelines for reports from Workgroups
 - Should be done by March 2025
- Workgroups held breakout sessions for 30 minutes and reported out their conversation to the full taskforce
- Workgroups report out items they would like to add to the survey
 - Substance use
 - Rural practice
 - Student loans/ finances
 - Experience in the law for minorities
- Discussing the style of the survey
 - Should include qualitative and quantitative
- Adjourned at 5:31pm

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Meeting Minutes

September 9th , 2024, 4:00pm- Hosted on Zoom

Task Force members in attendance: Justin Bingham (Chair), Michael Finkle, Darcel Lobo, Emily Arneson, Susan Lee, Kyle Sciuchetti, Sara Smucker Barnwell, Laura Moss

Absent: Raquel Montoya- Lewis, Ghousia Rahim, Melissa Berry

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy, BOG Liaison Nam Nguyen

Others: Philip Lentz, Gerald Heppler, Annasara Purcell, Miriam Korngold, Aaron Parker, Melissa Jaffe

Minutes

- Welcome by Chair Justin Bingham
 - Sara Smucker Barnwell was introduced as the newest member of the Taskforce
 - Approval of last meeting's minutes
 - Kyle Sciuchetti moved to approve the minutes, Darcel Lobo seconded the motion
 - Motion passed without opposition
 - Justin asked members to review State Recommendations memo: research methods and recommendations from OR, CO, NY and MA.
 - Meant to provide a snapshot of the processes from other state taskforces, as well as their recommendations
 - Kevin Plachy reviewed Taskforce Timeline Memo: workgroups research, recommendations, and interim reports.
 - Dates and a timeline from the present until completion of the taskforce
- Breakout Rooms for Workgroups

Each workgroup met for thirty minutes to discuss the items presented in the full taskforce session.
- Report out from breakout rooms:
 - Confirmed their next meeting outside of the ongoing Taskforce meetings
 - Discussed focal points for survey
 - Discussed internal progress and next steps

- Adjourned 5:25pm

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Minutes

October 14, 2024-4-5:30pm- [Zoom link here](#)

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442

[Website](#), [SharePoint](#)

Taskforce Members in attendance: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell

Absent: Raquel Montoya-Lewis BOG Liaison Allison Widney, Melissa Jaffe

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Others: Philip Lentz, Gerald Heppler, Annasara Purcell, Miriam Korngold, Aaron Paker

Minutes

- ◇ Welcome by chair Justin Bingham
 - Acknowledgment that this meeting is during Indigenous Peoples/Columbus Day.
 - Approval of September's meeting's minutes:
 - Emily Arneson moved to approve the minutes, Kyle Sciuchetti seconded the motion
 - Motion passed without opposition
 - Discuss status of survey questions from workgroups.

Breakout rooms focused on the following:

- What recommendations does the workgroup want to make towards the final report?
- Discussed working plan for completing the workgroup's interim report (due Dec 20th).

Report out from breakout rooms:

- Each workgroup reported their interim report timeline and asked clarifying questions and established expectations.

Adjourned 5:17pm

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Agenda

November 4, 2024-4-5:30pm- [Zoom link here](#)

Zoom phone#: (253) 215-8782 Meeting ID: 815 4476 4463 || Passcode: 720331

[Website](#)

Taskforce Members in attendance: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Laura Moss

Absent: Raquel Montoya-Lewis, BOG Liaison Allison Widney, Melissa Jaffe, Gerald Heppler, Sara Smucker Barnwell

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Others: Philip Lentz, Annasara Purcell, Miriam Korngold, Justin Lo, Ryann Peyton, Marci Comeau, Aaron Parker

Minutes

Welcome by Chair Justin Bingham

- Approval of October's meeting minutes:
 - Kyle Sciuchetti moved to approve the minutes, Judge Finkle seconded the motion
 - Motion passed without opposition
- Justin Bingham reported taskforce members who will be attending the Oregon's [Wellness Summit](#) on 11/8
- Dan Crystal requested members provide Feedback for the WSBA Equity and Justice Plan
- Justin Bingham explained timeline of current workgroup and the transition to new workgroups in January
 - 1. Government and Legal Aid 2. Suicide and Addiction
- Justin Bingham provided current workgroups expectations and the purpose of their report due on December 20th
- Guest Speaker Ryann Peyton, director from the Colorado Attorney Mentoring Program, provided information on the mentoring program adopted in their state. The presentation included the process used to create the program, as well as principles/values that guide the program currently.
- Breakout Rooms focused on the following:
 - o timeline for deliverables
 - o Discussed research and recommendations for the report
 - o Assigning writing roles to members
- Each workgroup reported the status of their interim report and their timeline for completion
 - o Survey workgroup asked for feedback on the questions that should be included on the survey

Adjourned at 5:36

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Minutes

December 2, 2024-4-5:30pm- [Zoom link here](#)

Zoom phone#: (253) 215-8782 Meeting ID: 824 4373 0929 || Passcode: 556585

[Website](#), [SharePoint](#)

Taskforce Members in attendance: Justin Bingham (Chair), Kyle Sciuchetti, Melissa Berry, Emily Arneson, Susan Lee, Sara Smucker Barnwell, Laura Moss

Absent: Michael Finkle, Raquel Montoya-Lewis, Darcel Lobo, Ghousia Rahim

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy, BOG Liaison: Allison Widney.

Others: Matt Thiese, Phillip L, Gerald Heppler, Annasara Purcell, Melissa Jaffe

Agenda

Welcome. (Justin, 10-15 minutes)

- Approval of Novembers meeting's minutes
 - Kyle Sciuchetti moved to approve the minutes, Melissa Berry seconded the motion
 - Motion passed without opposition
- Kyle Sciuchetti, Melissa Berry and Justin Bingham reported out their experience at the Oregon Wellness summit
- Justin Bingham reported change of date for January's taskforce meeting from 1/6/25 to 1/13/25 at 4pm
- Justin Introduced BOG liaison Alison Widney
 - Alison discussed their role and desire to assist the taskforce where they see fit
- Justin Bingham reported next workgroup focal points
 - Government and Legal Aid
 - Suicide and Addiction
 - Dan Crystal and Justin Bingham asked taskforce members to consider what group they would like to be assigned and to report their decision via email
- Emily Arneson discussed the value of the feedback provided to the survey group and next steps
 - Survey draft will be complete by 12/3 and will then be provided to taskforce chair Justin Bingham
 - Emily has offered to chat with any members on any decisions that were made for the survey
- Dan Crystal set agenda for Workgroups report writing
 - Considering 5 pages
 - Bulleting some locations as needed
- Breakout Rooms focused on the following:

- Reviewed timeline for deliverables
- Discuss research and recommendations for the report
- Assigned writing roles to members for each section
- Each workgroup reported the status of their interim report and their timeline for completion

Adjourned 5:25pm

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Minutes

January 13th, 2024-4-5:30pm- [Zoom link here](#)

Zoom phone#: (253) 215-8782 Meeting ID: 824 4373 0929 || Passcode: 556585

[Website](#), [SharePoint](#)

Taskforce Members in attendance: Justin Bingham (Chair), Melissa Berry, Emily Arneson, Susan Lee, Sara Smucker Barnwell, Laura Moss, Michael Finkle, Darcel Lobo, Ghousia Rahim, Kyle Sciuchetti

Absent: Raquel Montoya-Lewis BOG Liaison: Allison Widney

WSBA Staff: Adely Ruiz, Dan Crystal

Others: Justin Lo, Annsara Purcell

Agenda

Welcome. (Justin, 20 minutes)

- Approval of Decembers meeting's minutes
 - Susan Lee moved to approve the minutes, Emily Arneson seconded the motion
 - Motion passed without opposition
- Emily Arneson reported out updates on the member survey
 - expected to be open for three weeks beginning January 27th
 - taskforce members were asked to test out the survey (deadline 1/17)
- Justin Bingham updated Student, Privative Practice and Survey workgroups on their completion of a final report once survey results are received and assessed.
 - workgroups are currently on hiatus
- Justin Bingham and Dan Crystal spoke about the next two workgroups: 1. Government and Legal Aid 2. Suicide and Addiction
 - Justin Reported out each workgroup's first priorities are to assign Ad-Hocs and create a meeting schedule
 - Dan Crystal reported out which workgroup each taskforce member was assigned to and the reason for their assignment

Breakout Rooms discussed the following: (45 minutes)

- Their individual priorities as they relate to the workgroups
- discussion of state reports relevant to each workgroup
- Scheduling a time to meet outside of the Taskforce meeting
- A review of timeline for deliverables

- Each workgroup reported out their progress towards getting

acclimated to the topic and their next meeting date and/or their goals to establish a meeting date

Adjourned 5:28pm

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Minutes

February 3, 2025-4-5:30pm- [Zoom link here](#)

[Website](#), [SharePoint](#)

Taskforce Members in attendance: Justin Bingham (Chair), Melissa Berry, Emily Arneson, Susan Lee, Laura Moss, Darcel Lobo, Ghousia Rahim

Absent: Raquel Montoya-Lewis BOG Liaison: Allison Widney, Kyle Sciuchetti, Sara Smucker Barnwell, Michael Finkle

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Others: Annsara Purcell, Marci Comeau, Marlene Otero, Jennifer Stuber, Aaron Paker

Agenda

Welcome. (Justin 10 min)

- Approval of last meeting's minutes
 - Emily Arneson moved to approve the minutes, Melissa Berry seconded the motion
 - Motion passed without opposition
- Introduction of Ad Hoc members.
 - Annasara Purcell, Aaron Paker, Marlene Otero, Marci Comeau and Dr. Jenn Stuber were introduced as Ad Hoc members. Each spoke to their expertise, as well as what motivated them to participate with the taskforce.

Breakout Rooms for Workgroups met for forty minutes, and discussed the following:

- Confirmed a meeting schedule
- Created a timeline for surveys (if applicable), and discussed possibility of speakers they may want to hear from, and the importance of sticking to the timeline for report writing.

Workgroups reported out the following (10minutes)

- Discussed themes/ issues they want to address in their report
- Reported deliverables such as creating a focus group and or survey
- Mentioned potential speakers they would like to invite to the

taskforce in order to stimulate ideas for future
recommendations

Adjourned 5:30pm

WASHINGTON STATE BAR ASSOCIATION

Well-Being Taskforce Monthly Meeting Minutes

March 3, 2025-4-5:30pm- [Zoom link here](#)

[Website](#), [SharePoint](#)

Taskforce Members in attendance: Justin Bingham (Chair), Emily Arneson, Ghousia Rahim, Kyle Sciuchetti, Sara Smucker Barnwell, Michael Finkle

Absent: Melissa Berry, Susan Lee, Raquel Montoya-Lewis, Laura Moss, Darcel Lobo

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy, **BOG Liaison:** Allison Widney

Others: Marci Comeau, Marlene Otero, Jennifer Stuber, Leslie Hagin, Matt Thiese

Agenda

Welcome. (Justin)

- Approval of February meeting's minutes
 - Sara Smucker Barnwell moved to approve February minutes, Emily Arneson seconded the motion
 - Motion passed without opposition
- Survey updates
 - Emily Arneson spoke to survey results
 - 903 response/ 9% response rate total
 - Age range of replies
 - Matt Thiese reported on his team's efforts towards analyzing the survey results
 - Matt requested taskforce members send their requests regarding what they would like analyzed from the survey results
- Time frame for workgroups
 - New Member/Law student, Survey, and Private practice workgroups will reconvene in June
 - Once survey results are analyzed a final report will be required from each workgroup
 - Current workgroups are set to run through the end of May
 - Tentative update to chair is due at end of March regarding the work they have completed so far
 - Workgroup members are being asked to focus on this request
 - Kevin Plachy asked workgroups to avoid duplicating questions in their surveys with questions included in the previous membership survey

- Guest Speaker: Leslie Hagin from Washington Lawyers Assisting Lawyers spoke about her nonprofit organization, attorney difficulties, and the value in providing attorney peer support.
- Workgroups met in breakout rooms for 30 minutes to discuss the following:
 - Scheduling next meeting
 - Creating a timeline for disseminating their surveys
 - Report Writing
- Taskforce members reconvened and reported out their timeline deliverables
- Multiple members discussed wellbeing issues currently facing government workers. Emily Arneson suggested job security should be addressed in the government legal aid workgroup.

Adjourned 5:30pm

The Private Practice Working Group submits this interim report and recommendations to the WSBA Board of Governors. This interim report will detail the work performed by the working group to date and describe recommendations for well-being initiatives the group has formed based on its work and findings. These recommendations may be revised based on the results of the survey on member well-being that the Task Force is distributing in early 2025.

The Private Practice Working Group is comprised of members in working solo practice, small-firms, and large-firms in addition to two practicing therapists who work frequently with attorneys. To date the working group has focused its activity in three main areas: (1) proposing questions to the survey working group to be included in the well-being survey sent to WSBA members, (2) conducting a separate survey of attendees of the Solo/Small Practice conference to garner more detailed feedback from solo/small practice practitioners, and (3) evaluating the well-being strategies and proposals put forth by other states' task forces with regards to attorneys working in private practice, and seeking feedback from practitioners in other states as to the efficacy of such programs.

The working group will not review in detail our questions submitted to the survey group here, as those questions have already been included with the draft survey. This report will instead focus on the results of our survey of solo and small practice practitioners and our recommendations for WSBA to improve the well-being of attorneys in private practice. All recommendations made here are based on the results of our survey as well as analysis of what other states have done and the results obtained in other states.

I. Survey Results

We prepared and distributed a seven-question survey to attendees of the Solo/Small Practice conference on September 27, 2024 (copy attached) and received twenty-six responses. The purpose of this survey was to get more nuanced data on the well-being challenges of lawyers working in Solo/Small Practices than would be possible through the anticipated broader well-being survey. The survey contained a mix of multiple choice, ranking, and free-form response questions. The working group has not included visuals in this draft report of the data breakdowns and has instead described them, but with the final report suggests that visuals such as pie charts be included to describe survey results.

A. Biggest Barriers to Well-Being

In response to a free-form question asking about the biggest challenge to attorney well-being, two categories of responses dominated: the stress of management and the emotional difficulty of isolation. Fifty percent of respondents reported that one of their biggest challenges to maintaining their well-being has something to do with management, whether it is managing time, managing business and budget, wearing too many hats, or management and supervision of the staff. Thirty-one percent responded with some variation of isolation or loneliness, ranging from a general lack of others around to having no one to bounce ideas off. Other responses included such things as feeling like they cannot take vacations, taking on too much work, the lack of a guaranteed or steady income, and the need to know everything because no one else is there provide guidance or another opinion.

Those in the working group who work in solo or small practices were not surprised to see that isolation and management issues were at the top of the list. When the salaries of the entire staff fall on a small number of attorneys, there is pressure to spend more time chasing the next payment and less time interacting with others. That workload also makes day-to-

day monitoring of staff productivity, product orders, and marketing feel like one more crushing demand.

B. Factors Supporting Well-Being

With regards to what aspects of solo/small practice enhance one's well-being, 100% of responses identified some variation of freedom as the most important thing. Respondents noted the ability to set their own schedules, not having a boss, ability to pick and choose cases that they want or don't want, and deciding for themselves how much revenue and/or billable hours to aim for each week. Once again, this was no surprise to our group.

C. WSBA Resources Utilized

When asked about WSBA resources used, seventy-three percent of respondents reported having utilized CLEs. Nineteen percent reported having using peer advising, and the same number reported having never used a WSBA resource at all. Few had ever used referrals or mental health consultations, and none had participated in online support groups. Only a small number of our group have participated in the online support groups. We were not surprised that so few had utilized these resources given the perceived risk of stigma associated with seeking help.

D. Additional Resources or Changes Desired

One survey question asked respondents what additional resources would be helpful to them if offered through WSBA. The responses were as follows:

- Fifty-three percent of respondents thought that partnerships with gyms or other wellness service providers would be beneficial.
- Forty-two percent thought that a published list of professionals (therapists, counselors, life coaches, etc.) that could be accessed without requirement to log-in or make a request would be a helpful resource.
- Forty-two percent also thought it would help to have access to a publication filled with anonymous or signed "stories from the trenches" with attorneys sharing their struggles and their successes regarding well-being challenges.
- Thirty-one percent thought that offering more CLEs would help, with some respondents specifically asking that well-being CLEs be mandatory or be made part of the plenary session at more events to reduce any stigma associated with attending them.

Finally, the respondents were asked about changes to rule, court, or institutional changes that might improve overall well-being. Thirty-four percent either did not think the question applied to them or did not think any changes would help. Thirty-eight percent thought that more consistent consequences for bad/toxic behavior in and out of the courtroom (depositions, negotiations, etc.) would improve well-being. Forty-six percent felt that standardized court rules, including earlier filing deadlines, across the state would be beneficial. In our discussion a similar standardization for other state or county requirements, such as deed recording, were brought up as well.

E. Common Themes and Conclusions

A review of the above results supports two broad conclusions about the state of well-being among solo/small practice lawyers, all of which informed the recommendations in the next section. First, although mental health and well-being are becoming more commonly talked about than they were years ago, the fear of stigma or reprisal for seeking help in this area remains far too common. Lawyers remain afraid to make traceable requests for help, to seek out resources that require a login, or to attend optional CLEs on well-being topics for fear of what others will think. While we must continue to work towards eradicating this stigma, we also should work to make resources available in an anonymous way for those who continue to fear it.

Second, when it comes to supporting the well-being of solo/small practice lawyers, resources that foster connection and community do enhance well-being through reducing isolation, even if such programs are not explicitly “well-being focused.” Because isolation is such a significant barrier to well-being, any WSBA program that creates community and connection can also contribute to well-being. These conclusions are reflected in the recommendations made in Section II.

II. Recommendations

The private practice working group recommends that WSBA invest in the following resources to enhance the well-being of members working in private practice.

A. Make more CLEs focused on well-being available and make one such CLE per year mandatory.

Through well-being-focused CLEs, law firms and the WSBA can equip attorneys with the tools and knowledge they need to maintain their mental health and resilience in the face a high-stress career. These CLEs could cover topics such as stress management, mindfulness, burnout prevention, and work-life balance. While there has been an increase in the number of CLEs focused on well-being in the past few years, such offerings remain sporadic and discretionary.

Requiring at least one well-being CLE per year would help reduce the stigma surrounding mental health in the legal profession. Attorneys often fear that seeking help or attending well-being related programs might reflect negatively on their capabilities or professionalism. By making well-being CLEs mandatory, it signals to the profession that maintaining mental health is just as important as improving legal skills. This shift in culture can encourage more attorneys to proactively seek support when needed, rather than suffering in silence due to concerns about their reputation or career prospects. Such a policy would normalize the importance of mental well-being and of having open conversations about this topic, leading to more open conversations and a greater willingness to seek help without fear of judgment.

B. Publish more “stories from the trenches.”

One of the most requested well-being resources in the solo/small practice survey was access to more “stories from the trenches.” The idea is that members can publish anonymous or signed stories of their struggles and/or successes related to their well-being as practicing members of the legal community. Such stories could focus on mental health, physical health, stress management, self-advocacy as a member of an underrepresented group, or other topics

critical to member well-being. Reading these stories will allow struggling members to recognize that they are not alone and that there are others who have come out the other side. Writing the stories allows authors to give voice to their struggles or share their victories and take a concrete step towards helping themselves and others.

Stories could be made available in a variety of ways including links from the WSBA website, a dedicated section in each Bar News, or a separate volume published with the Bar News a couple times per year. The more different forums in which such stories are available, the more normalized talking about well-being struggles will become.

C. Make well-being resources available without a login.

Searching for professionals for help with mental health challenges, addiction, marital issues, or any number of other challenges that come from the stress of working in law can be daunting. Many members prefer to work with someone who has experience working with lawyers but are unsure of where to look for such professionals. Unfortunately, the fear of stigma remains strong enough for many members that they will not take any actions that could possibly put the bar on notice of any potential struggle they are having, which means they will not reach out to the wellness program managers or even access resources that require a personalized login. For that reason, the working group recommends creating another highly requested resource from our survey results: a list of resources, specifically wellness professionals, that can be accessed by members without the need to log into the WSBA website or contact the wellness program managers directly. Such a list could be published in the Bar News once or twice a year, or constantly available through the wellness program homepage without a login. The working group understands that the wellness program managers already internally maintain aspects of such a list currently to be able to provide referrals, so the main work associated with this proposal would simply be putting this into a form suitable for publishing.

D. Create programs to build community and support for Small/Solo Practices.

As we saw in the results of our survey of solos and small firm practitioners, they often face unique challenges, including a sense of isolation due to working independently without the support system that comes with larger firms. Creating programs that foster community among these lawyers can provide a vital source of support, both professionally and personally.

- i. Small Group Coaching. Small group coaching opportunities could offer solos a chance to connect with peers and experienced mentors who understand the specific struggles they face. These coaching groups could focus on practice management, client relations, or personal development, giving solo lawyers the tools they need to thrive. The collaborative environment would also encourage knowledge sharing, helping attorneys overcome common hurdles while building lasting relationships with others in similar situations.
- ii. Local Bar Association Events. Local bar association events can be a key component of creating a sense of community among solo practitioners. These events can provide a platform for networking, learning, and forming connections with other legal professionals in the area. By WSBA partnering with local bar associations, solos can gain access to educational opportunities and social gatherings that allow them to build relationships, share experiences, and stay informed about developments in the legal field. Such events would also create a more inclusive atmosphere where solos feel

- they are part of a larger legal community, rather than being disconnected or isolated in their own practice.
- iii. Offering Discounts Through WSBA. Offering WSBA-related discounts for solos can further support their professional and personal growth. While WSBA currently offers discounts on practice management software which helps ease some of the financial burdens associated with running a solo practice, it would also be beneficial to WSBA members if WSBA offers discounts with other services which supported members' well-being. This could include gym memberships, counseling services, and nutrition services, just to name a few. Creating these types of discounts would help solos feel more supported in both their personal and professional journey.

E. Develop a mentorship program for new attorneys.

Mentoring is another proven way to foster connection and community and mitigate the feeling of isolation and loneliness that is pervasive in the profession. Like the programming outlined above, strong mentoring relationships can serve as a vital source of professional and personal support. A mentoring program offers both an immediate tool and part of a long-term systemic solution to promote member well-being, professional development, and competence.

New lawyers in Washington have variable access and consistency to mentors early in their career when it is most essential to their professional identity formation. The WSBA does not offer a formal mentorship program. It does offer MentorLink Mixers, but those are meant to be a one-time meeting based on a specific topic and do not serve the same purposes as a formal mentoring program. Several affinity bar associations have optional formal mentoring programs for law students or new lawyers; almost all are in King County. A review of the list maintained [on the WSBA site](#) reveals most are informal opportunities rather than structured programs that pair new lawyers with an experienced lawyer. While the state's largest legal employers typically have internal mentor programs, they usually pair new attorneys with junior lawyers and are concentrated in Seattle. Many organizations continue to rely on informal mentoring; however, lawyers from underrepresented backgrounds, like first-generation lawyers, historically have not had the same access to mentors. This is particularly concerning as the profession moves away from the apprenticeship model.

By developing a formal mentor program for new lawyers, the WSBA would fill the gap in access to mentors and offer a consistent experience and connection point for all new members of the bar. The WSBA has already done some of the work in developing a [Mentoring Program Toolkit](#) and offering CLE credit for a [Self-Directed Structured Mentoring Program](#). Yet these resources do not address the fundamental issue of how a new lawyers who are not working at a large organization with an internal program might find a mentor.

The working group recommends that the WSBA take mentoring to the next level in Washington by offering its own formal mentoring program for new lawyers to foster connection and competence along with a smooth transition to practice. Drawing on the experience of the success of other state bar associations that have implemented this type of program, the WSBA's program should:

- Be required for all newly admitted lawyers with less than three years of experience
- Last 12-18 months

- Offer CLE credit to the newly admitted lawyers and the mentors
- Pair newly admitted attorneys with attorneys having at least five years of experience
- Require a uniform mentoring curriculum for all and an individualized mentoring plan
- Provide mentor training to ensure the mentors have adequate support and resources; consider offering the Mental Health First Aid program for mentors
- Infuse well-being as part of practice readiness and a sustainable practice
- Provide group mentoring opportunities in addition to one-to-one mentoring

The WSBA should think creatively about how to leverage the best aspects of the growing list of state bar mentoring programs, starting with the following:

- [Colorado Attorney Mentoring Program \(CAMP\) of Colorado Supreme Court](#)
- [State Bar of Georgia Transition into Law Practice Program](#)
- [Illinois State Bar Association Lawyer to Lawyer Mentoring Program](#)
- [Oregon State Bar New Lawyer Mentoring Program](#)
- [Utah State Bar New Lawyer Training Program](#)

F. Implement a Well-Being Pledge with resourcing from WSBA.

Employer policies and practices are a key driver of well-being outcomes for attorneys working in private practice. Employers that promote self-care, foster cultures of kindness and tolerance, and allow attorneys reasonable time and flexibility for non-work commitments cultivate well-being among employees. Unfortunately, too many legal employers continue to drive employee burnout by maintaining inflexible schedules, fostering cultures of criticism and competition, and declining to invest in well-being resources for employees. The culture around attorney well-being is unlikely to change unless legal employers play an active role in promoting and cultivating well-being.

Some nationwide programs have attempted to promote employer change through well-being pledges, but many of these programs do not offer support for employers in making positive changes or create any accountability for employers who take a well-being pledge. In addition, a one-size-fits-all approach to well-being pledges is likely to make such pledges inaccessible to small employers, as small firms attempting to improve employee well-being are likely to have less resources to invest.

The State of Colorado, however, offers a well-being recognition program for legal employers that provides participants with meaningful guidance on how to improve employee well-being, and with resources to help employers implement desired changes. Key features of this program supporting its efficacy include:

- i. **Resources:** The program is supported by full-time staff employed by the Colorado Supreme Court. At least one full-time-employee is dedicated to the task of helping legal employers identify and implement changes that will improve their employees' well-being. The availability of subject matter experts to help employers create bespoke plans makes participation accessible to employers of all sizes and helps employers prioritize goals.
- ii. **Community:** Program staff not only work directly with employers but also create opportunities for employers to come together and share best practices. Learning

about other legal employers' experiences helps employers gain confidence about implementing changes themselves.

- iii. **Flexibility:** The program categorizes potential changes or commitments as either easy, medium, or challenging across six different facets of promoting well-being. Employers can pick which policies or resources they want to focus on in a given year. This allows employers to create bespoke programs rather than adopting a one-size-fits all approach.
- iv. **Continuous Improvement:** The program encourages employers to make changes that can build on one another year after year so that participants are always moving forward towards increased well-being, but in increments and at a pace that are manageable for each specific employer. In contrast to some other pledge programs that simply ask employers to commit to the same set of practices year after year, this approach emphasizes incremental change and consistent improvement.
- v. **Accountability:** Employers submit reports to the program each year explaining how they have lived up to their pledge commitments. Employers that do substantially live up to their commitments are recognized by the Colorado Supreme Court and receive a badge to display on their website and other marketing materials.

The working group recommends that Washington State implement a program modelled after Colorado's program and featuring many of these same features. Such a program will support legal employers in enabling greater levels of attorney well-being.

The private practice working group looks forward to receiving the results of the member survey, analyzing how such results map onto our current recommendations, and submitting a final draft of our recommendations at that time.

Law School / New Member Workgroup – Final Report

December 5, 2024

Work Plan Overview

The **Law School / New Member Workgroup** has been actively developing recommendations to enhance well-being among law students and new members of the Washington State Bar Association (WSBA). The workgroup's approach incorporates a thorough review of existing research, new data collection via targeted outreach, and the formulation of actionable recommendations.

Workgroup Members

Justice Raquel Montoya-Louis, Washington State Supreme Court
Susan Lee, Ph.D., Assistant Dean of Students, Gonzaga Law
Adely Ruiz, Liaison, Washington State Bar Association (WSBA)
Bushra Rahim, Attorney
Gerald Heppler, Assistant Dean of Admission, Seattle University School of Law
Phillip Lentz, Clinical Psychologist, University of Washington School of Law

Timeline and Approach

The Law School / New member Workgroup began with the assignment of Susan Lee, Assistant Dean of Students, as their chair. We included Bushra Rahim, Attorney, and Justice Montoya-Lewis as participating members with the assistance of WSBA liaison, Adely Ruiz. During their first meeting on July 1st, 2024, the group identified two ad hoc members Gerald Heppler, Assistant Dean of Admission at Seattle University School of Law, and Phillip Lentz, the Clinical Psychologist at University of Washington School of Law. The two ad hoc members joined the group on August 5th, 2024.

Literature Review

The workgroup's efforts began with a focus on the task force charter's first objective: a well-being survey targeting law students and new members. Initial work included analyzing various sources, including:

- **Survey of Law Student Well-Being** (American Bar Association): Insights on mental health challenges like stress, substance abuse, and burnout among law students.
- **Wellness & Wellbeing Initiative** (University of Minnesota Law School): A student-led program promoting wellness through mentorship, events, and feedback.
- **It Is Okay to Not Be Okay: The 2021 Survey of Law Student Well-Being**: Highlights of mental health struggles faced by law students.

- **The Phantom Menace to Professional Identity Formation and Law School Success: Imposter Syndrome:** A study on imposter syndrome's effect on law students' development.
- **A Brighter Future for Law Student Well-Being?** Trends and initiatives for enhancing well-being in legal education.
- Additional insights and reporting from Gonzaga University, Seattle University, and the University of Washington.

Survey Development Process and Distribution

The workgroup explored the idea of a focus group before deciding on a survey format. Key topics of discussion included common stressors for law students and practitioners. Using a combination of literature reviews and survey analysis from other law schools, the group laid the groundwork for its own survey design.

Survey Development Process

1. **Question Development:** Each workgroup member proposed questions, which were collectively reviewed, refined, and finalized.
2. **Distribution:** The survey was administered through Microsoft Teams to law students at Gonzaga, Seattle University, and the University of Washington, as well as new graduates, practitioners, and the broader WSBA community.
3. **Response:** The survey remained open for seven days, yielding 24 anonymous responses.
4. **Analysis:** Responses were discussed to inform recommendations for a larger survey to WSBA members.

Survey Distribution

A link to the mini survey was shared with key stakeholders and specific individuals within our target demographic. Specifically, the survey went to law students from Gonzaga Law, Seattle University School of Law, University of Washington School of Law. The survey was also distributed to new practitioners within the broader WSBA community. We received 24 responses.

Survey Questions and Purpose

The survey aimed to identify key wellness challenges and opportunities in the legal field. Each question's rationale and purpose were discussed at length among workgroup members:

1. **What does wellness mean to you?**
 - **Purpose:** To establish a baseline understanding of how participants perceive wellness.
2. **Do the available wellness services seem approachable? Why or why not?**
 - **Purpose:** To evaluate accessibility and stigma surrounding existing wellness and mental health services.
3. **Are there barriers preventing you from using wellness services?**

- **Purpose:** To identify obstacles, including work/office culture, billable hours demand precluding regular use of wellness services, and systemic expectations.
- 4. **Has utilizing wellness services improved your performance as a student or practitioner? How?**
 - **Purpose:** To determine if wellness services have a measurable impact on performance and resilience.
- 5. **How could the legal field better embrace your definition of wellness?**
 - **Purpose:** To explore cultural and structural changes that could enhance well-being by expanding traditional definitions of wellness.

Recommendations

The workgroup developed a four-stage progression to integrate mental health and wellness into the legal field:

1. General Support

Models of support could include:

- Psychoeducation presentations on stress, anxiety, depression, substance use, suicidality, addiction, interpersonal effectiveness, empathy, community building, boundary setting, motivation and focus, sleep and diet hygiene.
- Identifying a calendar of events that correspond with specific industry trends/routine to coordinate the presentations as they correspond to current needs.
- Gradual development of mental health support packages that match industry trends/patterns within needs we identify, for individuals to take home and use to implement therapeutic interventions on their own.

2. Fostering Connection to Resources

In addition to the general presentations and aid packages, a committee could:

- Spend time exploring, documenting, and providing legal professionals with helpful resources, both within and outside the community, to help develop and manage their well-being as a legal professional.
- This expansion should also provide insight into legal culture and experience that could be helpful as a bridge of communication to the decision makers in the industry.

3. Supportive Community Building

In addition to presentation and resource management, a committee could explore:

- Intentional collaboration in programming within the legal field (heavy handed community building),
- Seeking external experts for presentations (including high achieved legal professionals, substance use consultants, organizational psychologists from

competitive environments), and further developing well-being programming within the legal field (including peer support groups, yoga, allyship).

- This is most likely the stage that would most differentiate us from the rest of the country on how well we support our legal professional within the scope of well-being.

4. Culture Change

The development of the first three stages would hopefully strengthen a buy-in process on the importance of taking care of our legal professionals are human beings first, allowing the industry to at least acknowledge that moving toward wholistic care of the legal professional allows for a more sustainable legal field.

The application of the foundational development of the other stages would directly impact the culture the legal field, including myth busting, establishing resilience/growth models within systems, interpersonal mediation, and crisis prevention.

Additional Recommendations:

- **Wellness Curriculum:**
 - A mandatory wellness course offered at the start of law school and annually thereafter for law students.
- **Wellness CLEs:**
 - Increased Legal Education (CLE) credits to support practitioners' well-being.

Member Wellbeing
Survey Workgroup
Final Survey
Questions

- 1) What is your age group?
 - a) <25
 - b) 25-29
 - c) 30-34
 - d) 35-39
 - e) 40-44
 - f) 45-49
 - g) 50-54
 - h) 55-59
 - i) 60-64
 - j) 65-69
 - k) 70+

- 2) What is your gender identity?
 - a) Female
 - b) Male
 - c) Transgender
 - d) Non-Binary / Non-Conforming
 - e) Other (please specify) _____
 - f) Prefer not to disclose

- 3) What is your race/ethnicity? Select all that apply:
 - a) American Indian/Native American/Alaskan Native
 - b) Asian-Central Asian
 - c) Asian-East Asian
 - d) Asian-South Asian
 - e) Asian-Southeast Asian
 - f) Asian-Unspecified
 - g) Black/African American/African Descent
 - h) Hispanic/Latinx
 - i) Middle Eastern Descent
 - j) Multi-Racial/Bi-Racial
 - k) Pacific Islander/Native Hawaiian
 - l) White/European Descent
 - m) Other (please specify) _____
 - n) Prefer not to disclose

- 4) What is your relationship status?
 - a) Married
 - b) Not married, but in a committed relationship
 - c) Single
 - d) Divorced
 - e) Widowed
 - f) Other (please specify) _____
 - g) Prefer not to disclose

- 5) Do you have caregiving responsibilities on a regular basis for one or more minor children, dependent adults, or aging parents?
- a) Yes
 - b) No
- 6) Sexual Orientation (choose all that apply):
- a) Straight (heterosexual)
 - b) Gay
 - c) Lesbian
 - d) Other *[If chosen a window will open with the following choices]*
 - i) Asexual
 - ii) Bisexual
 - iii) Pansexual
 - iv) Queer
 - v) questioning or unsure
 - vi) same-gender loving
 - vii) an identity not listed: please specify _____
 - e) Prefer not to disclose
- 7) In what county is your primary practice?
- a) King, Pierce, Snohomish, Spokane, or Clark
 - b) Thurston, Kitsap, Yakima, Whatcom, or Benton
 - c) Skagit, Cowlitz, Grant, Franklin, Lewis, Island, Chelan, Clallam, Grays Harbor, Mason, or Walla Walla
 - d) Stevens, Whitman, Kittitas, Douglas, Okanogan, Jefferson, Pacific, Klickitat, Asotin, Adams, San Juan, Pend Oreille, Skamania, Lincoln, Ferry, Wahkiakum, Columbia, or Garfield
 - e) Other, including outside of Washington State
- 8) How many years have you been practicing law?
- a) Less than 1
 - b) 1 to 5 years
 - c) 6 to 10 years
 - d) 11 to 20 years
 - e) 21 to 30 years
 - f) 31 to 40 years
 - g) More than 40 years
- 9) Which of the following is your WSBA license type?
- a) Judicial *[route to question 10]*
 - b) Attorney (including Active, Honorary, Inactive, and Pro Bono) *[route to question 12]*
 - c) Limited License Legal Technician (LLLT) (including Active, Inactive, and Pro Bono) *[route to question 12]*

- d) Limited Practice Officer (LPO) (including Active and Inactive) *[route to question 12]*
- 10) *[If judicial license type]* Rounded to the nearest whole number, how many years have you sat on the bench? _____ years
- 11) *[If judicial license type]* Which setting best describes your current judicial position?
- a) Appellate Court (any level)
 - b) Superior, District, or Municipal Court
 - c) Juvenile Court
 - d) Tribal Court
 - e) Administrative Law Judge
 - f) Magistrate Judge
 - g) Other, please specify: _____
- 12) *[If license type other than judicial]* Which of the following best describes your primary area of practice?
- a) Litigation (civil)
 - b) Litigation (criminal)
 - c) Transactional (e.g., business, real property, contracts)
 - d) Family Law
 - e) Administrative, Government or Regulatory
 - f) Other, please explain _____
- 13) Which of the following best describes the organization where you currently work?
- a) Private Practice: Solo
 - b) Private Practice: 2 to 5 practitioners
 - c) Private Practice: 6 to 15 practitioners
 - d) Private Practice: 16 to 35 practitioners
 - e) Private Practice: 36 to 75 practitioners
 - f) Private Practice: More than 75 practitioners
 - g) Judicial Chambers (e.g., hearing officer, law clerk)
 - h) Government, public service, or non-profit
 - i) In-House (corporate or for-profit)
 - j) Law School (professor or administration)
 - k) Bar administration or lawyer assistance
 - l) Other, please specify: _____
- 14) In the past month, how many hours did you work in an average week? Include billable and non-billable time.
- a) Less than 30
 - b) 30-34
 - c) 35-39
 - d) 40-44

- e) 45-49
- f) 50-59
- g) 60-69
- h) 70-79
- i) 80-89
- j) 90-99
- k) 100 or more

15) How many billable hours do you work on average per week?

- a) Less than 20
- b) 21 to 30
- c) 31 to 40
- d) 41 to 50
- e) More than 50
- f) I do not track billable hours.

16) Does your employer have a minimum billable hour expectation?

- a) Yes
- b) No

[If yes] What is the billable hour expectation?

- i) Less than 1500 hours per year
- ii) 1501 – 1750 hours per year
- iii) 1751 – 1850 hours per year
- iv) 1851 – 2000 hours per year
- v) 2001 – 2200 hours per year
- vi) Other, please specify: _____

[If yes] How often do billable hour expectations cause you stress?

- vii) Every day or nearly every day
- viii) Regularly
- ix) Occasionally
- x) Rarely
- xi) Never

17) How often do you feel burned out from your work?

- a) Every day or nearly every day
- b) Regularly
- c) Occasionally
- d) Rarely
- e) Never

18) How often does your employer (or clients if in solo practice) expect you to be available outside of work hours?

- a) Never
- b) Occasionally
- c) Regularly
- d) Always

19) Have you ever considered leaving the legal profession due to stress, burnout, or mental health issues?

- a) Yes
- b) No
- c) Maybe

20) How often do you feel stressed by your financial situation?

- a) Every day or nearly every day
- b) Regularly
- c) Occasionally
- d) Rarely
- e) Never

21) Have financial concerns ever caused you to consider leaving the legal profession?

- a) Yes
- b) No
- c) Maybe

22) Did you graduate law school with student loan debt?

- a) Yes
- b) No
- c) Did not attend law school

[If yes] How much debt did you have upon graduation?

- i) Less than \$20,000
- ii) \$20,001 to \$50,000
- iii) \$50,001 to \$100,000
- iv) \$100,001 to \$150,000
- v) more than \$150,000
- vi) Prefer not to disclose

[If yes] To what extent has student loan debt negatively affected your mental wellbeing?

- vii) Not at all
- viii) Somewhat
- ix) Significantly

[If yes] Have you ever wanted to make a job or career change, but did not because of your student loan debt?

- x) Yes
- xi) No
- xii) Maybe

23) During the past 7 days, how many days did you engage in physical activity for at least 20 minutes?

- a) 0 days
- b) 1 day
- c) 2 days
- d) 3 days
- e) 4 days
- f) 5 days
- g) 6 days
- h) 7 days

24) How many hours of sleep do you get on an average night?

- a) Less than 4
- b) About 4
- c) About 5
- d) About 6
- e) About 7
- f) About 8
- g) More than 8

25) How often do you wake up feeling rested and restored?

- a) Never
- b) Rarely
- c) Sometimes
- d) Regularly
- e) Always

26) Which of the following activities do you do to support your mental health and wellbeing? Check all that apply.

- a) Meditation
- b) Therapy, counseling, or group supports
- c) Physical exercise or active hobby (gardening, dancing, etc.)
- d) Prescription medication
- e) Supplements, vitamins, or over-the-counter medications
- f) Other: _____
- g) I am not doing any activities to support my mental health.

27) In the past month, how often have you felt sad, depressed, or hopeless?

- a) Every day or nearly every day

- b) Regularly
- c) Occasionally
- d) Rarely
- e) Never

28) In the past month, how often have you felt nervous, on edge, worried or panic?

- a) Every day or nearly every day
- b) Regularly
- c) Occasionally
- d) Rarely
- e) Never

29) The following questions address sensitive topics related to mental health, specifically experiences with suicidal thoughts or acts of self-harm, and may be distressing for some individuals. If you find this content difficult, please feel free to skip this question, take a moment for self-care, and/or reach out to a support resource if needed.

24/7 National Suicide Prevention Hotline: dial 988

24/7 Crisis Text Line: Text "HOME" to 741741

[Select option to skip or continue]

a) In the past 12 months, have you had suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm?

- i) Yes
- ii) No
- iii) Prefer not to disclose

b) If yes, to what extent do you feel your work environment contributed to these thoughts or actions?

- i) Significantly contributed
- ii) Somewhat contributed
- iii) Did not contribute at all
- iv) Prefer not to disclose

30) Do you ever feel concerned about how much or how often you drink alcohol?

- a) Yes
- b) No
- c) I do not drink alcohol
- d) Prefer not to disclose

31) In the past 12 months, has anyone expressed concern about your use of alcohol?

- a) Yes
- b) No
- c) I do not drink alcohol

d) Prefer not to disclose

32) In the past 12 months, have you used drugs other than those prescribed for a current medical condition (i.e., recreational use)? *[branching – if “no” or “prefer not to disclose,” skip to #33]*

a) Yes

b) No

c) Prefer not to disclose

[If yes] Do you ever feel concerned about how much or how often you use drugs recreationally?

i) Yes

ii) No

iii) Prefer not to disclose

[If yes] In the past 12 months, has anyone expressed concern about your use of recreational drugs?

iv) Yes

v) No

vi) Prefer not to disclose

33) To what extent do you agree with the following statement: The stress of my job and/or the culture at my workplace cause me to drink alcohol or use recreational drugs more than I otherwise would.

a) Strongly agree

b) Somewhat agree

c) Neither agree nor disagree

d) Somewhat disagree

e) Strongly disagree

34) My workplace social events include alcohol:

a) Never

b) Some of the time

c) Often

d) Always

35) Are you exposed to distressing material, experiences, or trauma related to your clients or others you encounter in doing your job?

a) Yes

b) No

c) Sometimes

d) Unsure

[If yes, sometimes, or unsure] How often do you find yourself thinking about work-related distressing material, experiences, or trauma outside of work?

- i) Never
- ii) Some of the time
- iii) Often
- iv) Always

[If yes, sometimes, or unsure] How much of an impact does exposure to distressing material, experiences, or trauma from work have on your mental health or wellbeing?

- v) Significant impact
- vi) Slight impact
- vii) No impact
- viii) Unsure

36) Does your employer offer wellness programs, initiatives, or other wellbeing resources?

- a) Yes
- b) No
- c) I don't know

[If yes] What resources does your employer offer? Check all that apply.

- d) Educational content on well-being
- e) Membership or subscriptions to wellness resources or apps
- f) Direct financial support for well-being activities (gym stipends, etc.)
- g) Flexible options for mental health leave
- h) Access to or referrals for external wellness resources (coaches, therapists, etc.)
- i) Whole office mental health opportunities (scheduled walk/stretch breaks, periodic half days not on holidays, motivational speakers at staff meetings, etc.)
- j) Other, please specify: _____

37) Have you utilized any wellness programs offered by your employer?

- a) Yes
- b) No

[If no] If not, what prevents you from utilizing these resources? Check all that apply.

- (1) Stigma, or reputational/confidentiality concerns
- (2) Fear it will affect your path to promotion
- (3) Not having the time to utilize services
- (4) Doubt that these offerings will make a difference
- (5) I utilize other resources not provided by my employer
- (6) Too costly—financial or time away from work

(7) I haven't needed these resources

(8) Other, please specify: _____

38) Which of the following WSBA resources on well-being have you utilized? Check all that apply.

- a) CLEs on well-being related topics
- b) Online support groups (Healing Minds, Pathways to Productivity, Career Guidance)
- c) Referrals for services (for therapists, prescribers, treatment centers, Unbar)
- d) Peer advising
- e) Mental health consultations/brief therapy
- f) I have not used any of these resources.

[If they select (f) above] What prevents you from utilizing these resources?

Check all that apply.

- (a) Concerns about professional discipline
- (b) Unaware of these resources from WSBA
- (c) Not having the time to utilize services
- (d) Doubt that these offerings will make a difference
- (e) I utilize other resources not provided by WSBA
- (f) Too costly—financial or time away from work
- (g) I haven't needed these resources
- (h) Other, please specify: _____

39) What sorts of additional resources do you think would be helpful to you if available through WSBA?

- a) Additional CLEs or educational material
- b) Published list of well-being professionals available without request or log-in
- c) WSBA partnership with gym(s), weight management companies, etc. for discounted memberships
- d) Publication of anonymous or signed stories contributed by WSBA members willing to share their struggles and/or successes regarding well-being challenges
- e) Other suggestions (please list):

40) Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being? *[Answer choices: not at all, somewhat, significantly]*

- a) Making court filing deadlines earlier than midnight
- b) Standardizing court rules/preferences across counties
- c) Consistent consequences for abusive/demeaning tactics within hearings (direct comments to opposing counsel, use of improper names such as "sweetheart" or "young man," repeatedly talking over or interrupting)
- d) Feedback resource when concerns about judge's behavior (condescending attitude, being overly harsh, etc.)

e) Other suggestions (please list here):

41) What could your employer, the legal community, courts, or legal institutions do to better support your mental health and wellbeing? *[Open-ended response]*

Interim Report
Member Wellbeing Taskforce—Government and Legal Services Workgroup

By Judge Michael Finkle, Chair
March 24, 2025

The Government and Legal Services Workgroup is focusing on identifying wellbeing issues specific to the discrete category of lawyers in government or legal services (e.g., legal aid) practice. This includes both criminal prosecution and defense, civil practice representing the government at city through state levels, and legal aid and other public interest contexts. Workgroup members included attorneys, the undersigned, a Supreme Court Justice and an ad hoc attorney member. Midway through our assignment, the second ad hoc member had to step down.

Our strategy was to develop a wellbeing survey that explored issues unique to our identified audience. We developed, refined, and disseminated a survey that has a return date of April 15 or sooner. Once we receive the survey results, we develop recommendations specific to that identified audience. The Taskforce as a whole can incorporate this workgroup's results into its report to the WSBA.

If anyone is interested, here is a summary of the questions on our survey:

1. Extent to which the survey-taker (ST) prioritizes wellbeing.
2. Extent to which wellbeing is impacted by compression fatigue.
2. Extent to which wellbeing is impacted by vicarious trauma.
3. Identify from list of factors that negatively impact wellbeing (eight factors plus a category for "none").
4. Rank current level of burnout (scale of 1-10).
5. Impact of funding for their organization on wellbeing and ability to perform job.
6. Impact of personal finances on stress levels or other aspects of wellbeing (e.g., student loan debt, cost of living, lower salary)
8. Participation in student loan forgiveness program and impact on wellbeing.

Member Wellbeing Taskforce – Suicide and Addiction **Workgroup**

Chair: Emily Arneson

Members: Bushra Rahim, Susan Lee, Laura Moss, Sara Smucker Barnwell

Ad Hoc: Annasara Purcell, Jenn Stuber, Aaron Paker

Duration: January 2025 to May 2025

Workgroup Focus/Deliverables:

Focus is on suicide and addiction within the legal profession.

The workgroup should develop a schedule for meetings throughout the duration of the workgroup.

Working documents should be placed in the Suicide and Addiction Workgroup folder within SharePoint.

The workgroup should focus on outreach and research including: Review research and reports from other states to assist in orientation to the work (contained in SharePoint).

Research surveys from other states and be prepared to review the task force member survey results which should be available by April 7, 2025 and integrate information relevant to the workgroup topic into their final recommendations.

Topics of workgroup focus could include an exploration of root causes of addiction and substance use within the legal profession, factors contributing to suicidal ideation experienced by legal professionals, substance use, and other issues related to suicide and addiction within the legal profession.

Timeline for Workgroup Deliverables:

- **Ad-Hoc Members:** At least three identified ASAP. Jenn Stuber, Leslie Hagin, and Annasara Purcell are the names yet to be finalized.
- **Verbal Progress Update:** To be delivered monthly at the full taskforce meeting.

- **Written Update:** to entire TF due to Chair by **March 28, 2025**. This update does not need to be formal. A page long update outlining work plan, outreach/research methods, and progress towards completion will suffice.

Final Workgroup Report Writing:

- During the month of June, the two workgroups (and the Private Practice and Law Student/New Member Workgroups) will work on report writing with the objective of producing Final Reports by **June 27, 2025**.
- Final workgroup reports will be reviewed at the July full taskforce meeting.

Guest Speakers and Reading List – Suicide and Addiction Workgroup

Wil Miller—recovered from methamphetamine addiction and has written and spoken about it.

Leslie Hagin—Leader of [Washington Lawyers Assisting Lawyers](#) and the Unbar

Katherine Bender-Psychologist focused upon attorney suicide. Worked at the Dave Nee Foundation

Reading List

- [Stressed, Lonely, and Overcommitted: Predictors of Suicide Risk](#)
- *Why Lawyers are Prone to Suicide* (Patrick Krill; CNN Opinion (Jan. 21, 2014)).
- [Big Law Killed My Husband](#)
- *Trauma for the Tough-Minded Prosecutor* (Stacy Miles-Thorpe; The Texas Prosecutor Journal (July-Aug. 2016)).
- *The Legal Profession's Drinking Problem* (Patrick Krill; CNN Opinion (Feb. 6, 2016)).
- *About One-Fifth of Lawyers and Staffers Considered Suicide at Some Point in Their Careers, New Survey Says* (Debra Cassens Weiss; ABA Journal (May 10, 2022)).
- *One in 10 Young Lawyers Worldwide 'Experiencing Suicidal Thoughts'* (Jemma Slingo; The Law Society Gazette (Apr. 8, 2021)).
- *The Prevalence of Substance Use and Other Mental Health Concerns Among American Attorneys* (Patrick R. Krill, Ryan Johnson & Linda Albert; 2016:10 J. Addict. Med. 46-52 (Jan./Feb. 2016)).
- *The Lawyer, the Addict* (Eilene Zimmerman; New York Times (July 15, 2017)).
- *Depressive Symptoms and Suicidal Ideation Among Lawyers and Other Law Professionals* (Matthew S. Thiese, et al.; 63 J. Occup. & Env. Med. 381-386 (May 2021)).
- *Stressed, Lonely, and Overcommitted: Predictors of Lawyer Suicide Risk* (Krill, et al; Healthcare Vol. 11, Issue 4 (2023)).

- [<https://s/Addressing-the-Lawyer-Suicide-Crisis-A-Guide-for-Bar-Leaders-Nick-Hansen-ABA-Bar-Leader-Sept-29-2023.pdf>]*Addressing the Lawyer Suicide Crisis: A Guide for Bar Leaders* (Nick Hansen; American Bar Association Vol. 46, Issue 5 (September 29, 2023)).
- **Addressing the Effects of Vicarious Trauma Experienced by Court Employees, Tiffany Hammill, 2018**
- Line Rønning, Jocelyn Blumberg & Jesper Dammeyer (2020): Vicarious traumatisation in lawyers working with traumatised asylum seekers: a pilot study, Psychiatry, Psychology and Law, DOI

**WASHINGTON STATE BAR ASSOCIATION
MEMBER WELLBEING SURVEY
CONGRESSIONAL DISTRICT**



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National Business Research Institute, Inc

Date: February, 2025

Washington State Bar Association - Member Wellbeing Survey - Congressional District

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Section III: Client Specific

Appendix A: Washington State Bar Association Member Wellbeing Survey














Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section I: Response Rates

Group Name	Number Responding	Number Possible	Response Rate
Total Company	903	10,000	9%
District 0	70	1,400	5%
District 1	57	700	8%
District 2	59	500	12%
District 3	64	500	13%
District 4	39	300	13%
District 5	86	800	11%
District 6	109	800	14%
District 7N	90	1,200	8%
District 7S	112	1,500	7%
District 8	54	500	11%
District 9	77	1,100	7%
District 10	86	700	12%

Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

Items	Number Responding	Mean	Mean Graph	No	Yes
			N Y		
5. Do you have caregiving responsibilities on a regular basis for one or more minor children, dependent adults, or aging parents?					
Total Company	903	1.40		60%	40%
District 0	70	1.53		47%	53%
District 1	57	1.35		65%	35%
District 2	59	1.37		63%	37%
District 3	64	1.30		70%	30%
District 4	39	1.33		67%	33%
District 5	86	1.40		60%	40%
District 6	109	1.38		62%	38%
District 7N	90	1.38		62%	38%
District 7S	112	1.39		61%	39%
District 8	54	1.52		48%	52%
District 9	77	1.47		53%	47%
District 10	86	1.40		60%	40%


Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
1. What is your age group?								
<25	Total Company	1						0%
	District 0	0	No valid cases					0%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	1						1%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%

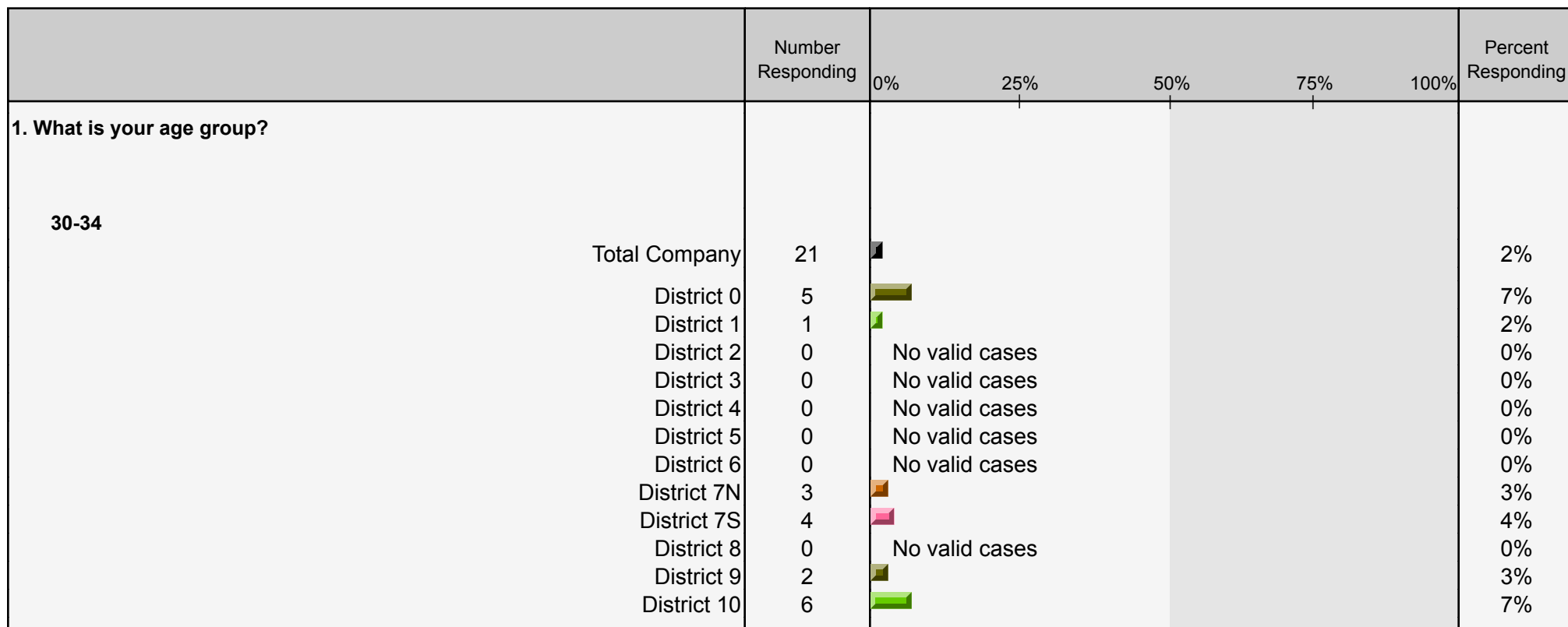
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
1. What is your age group?								
25-29	Total Company	2						0%
	District 0	2						3%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	0	No valid cases					0%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%

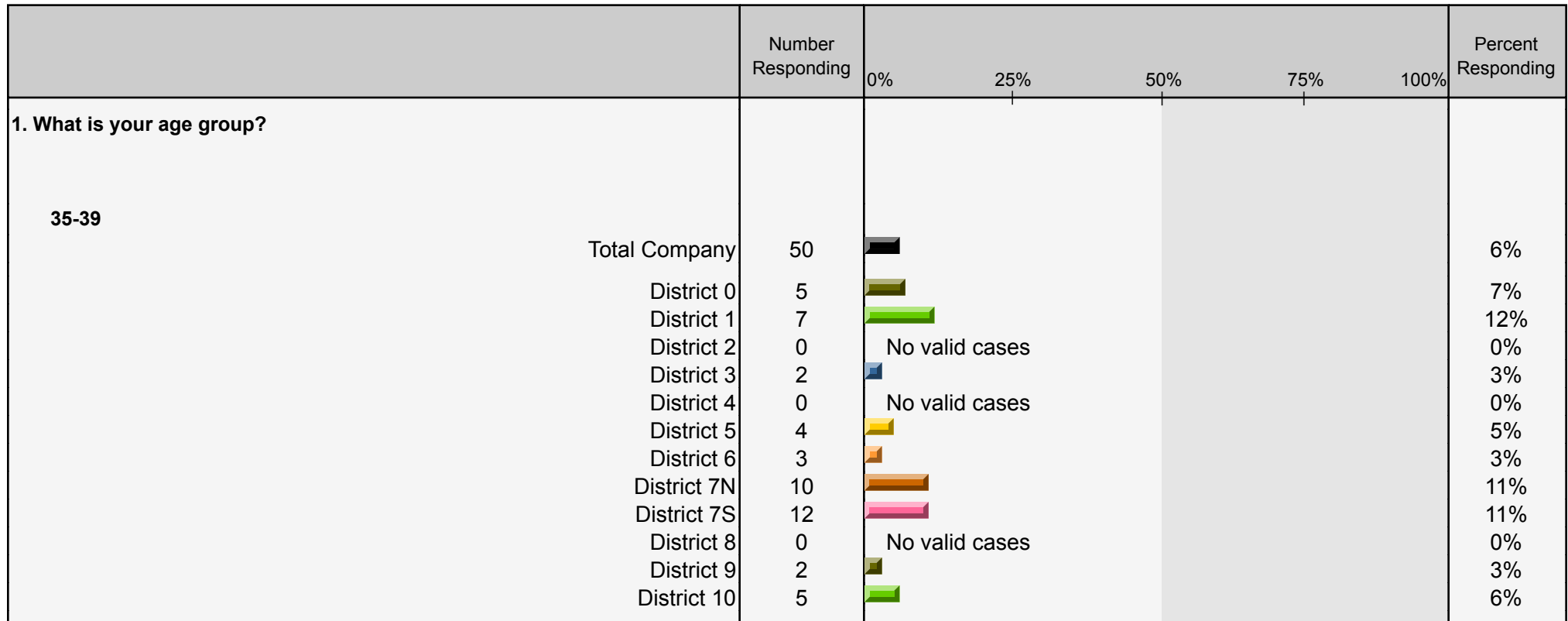
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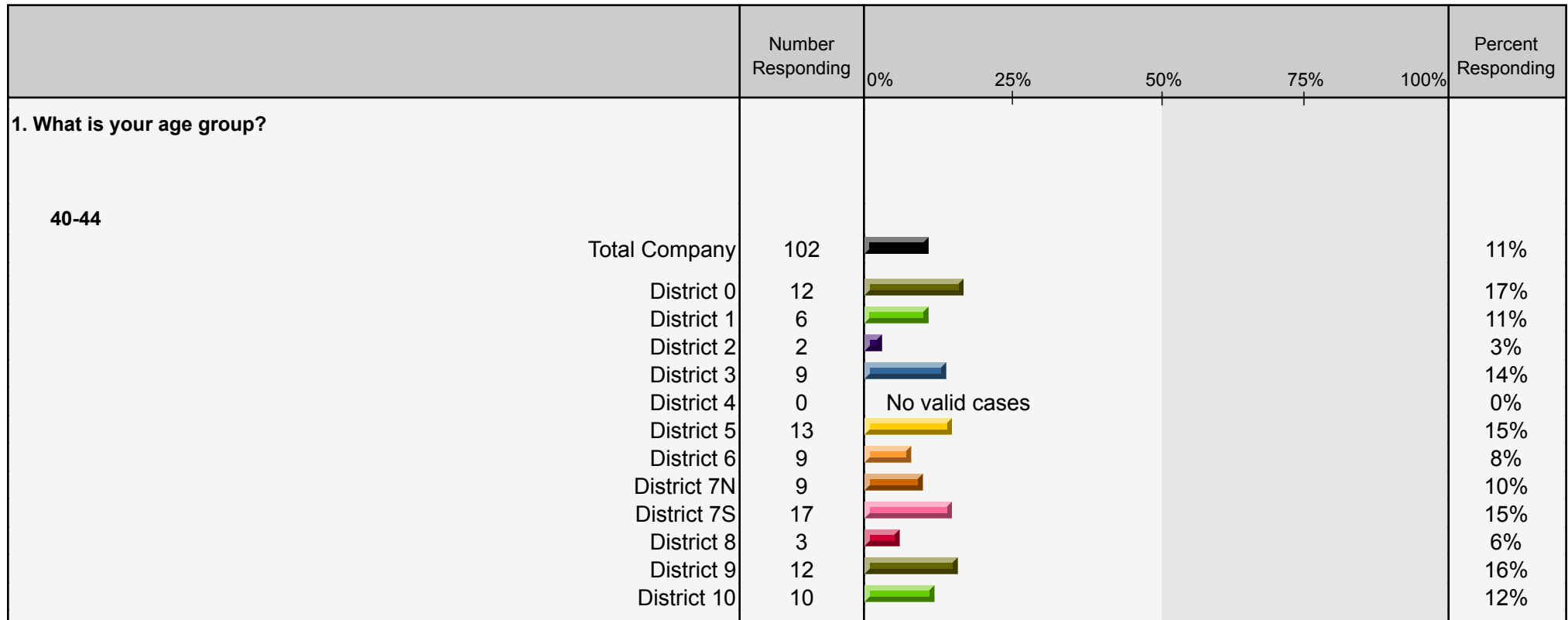
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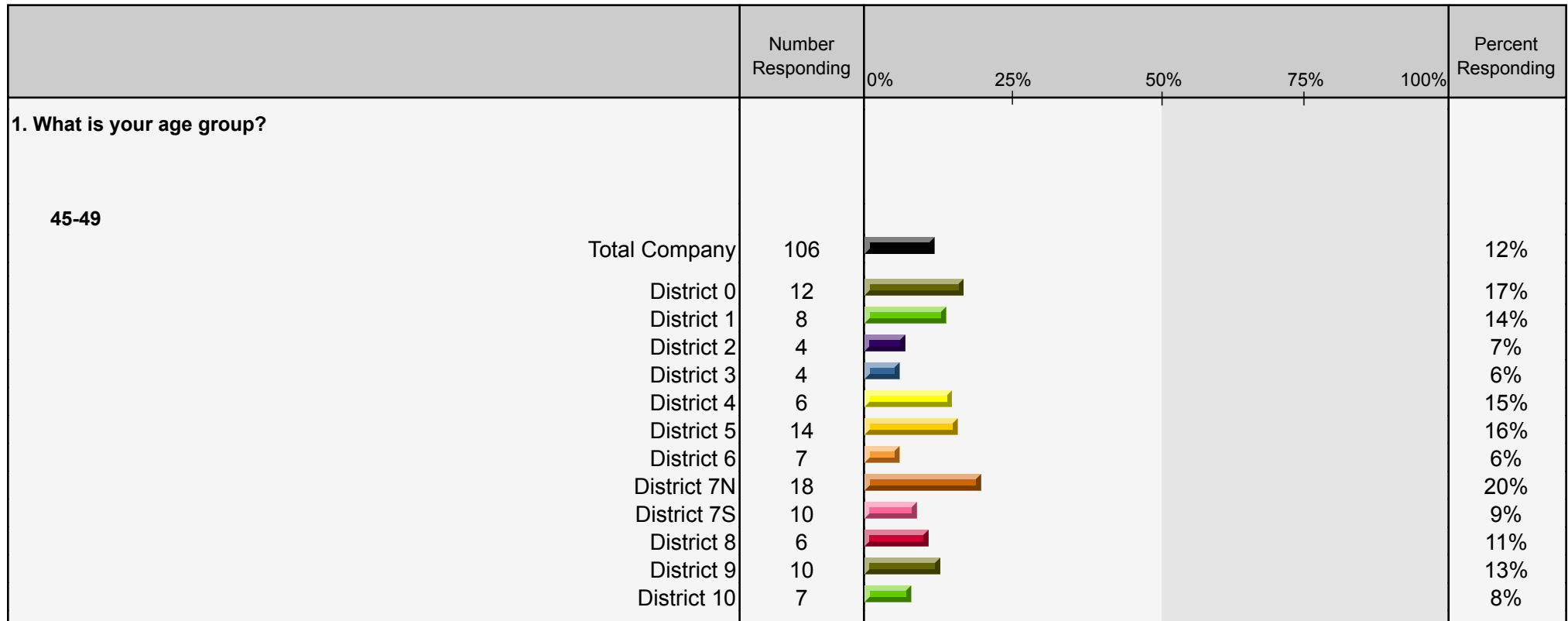
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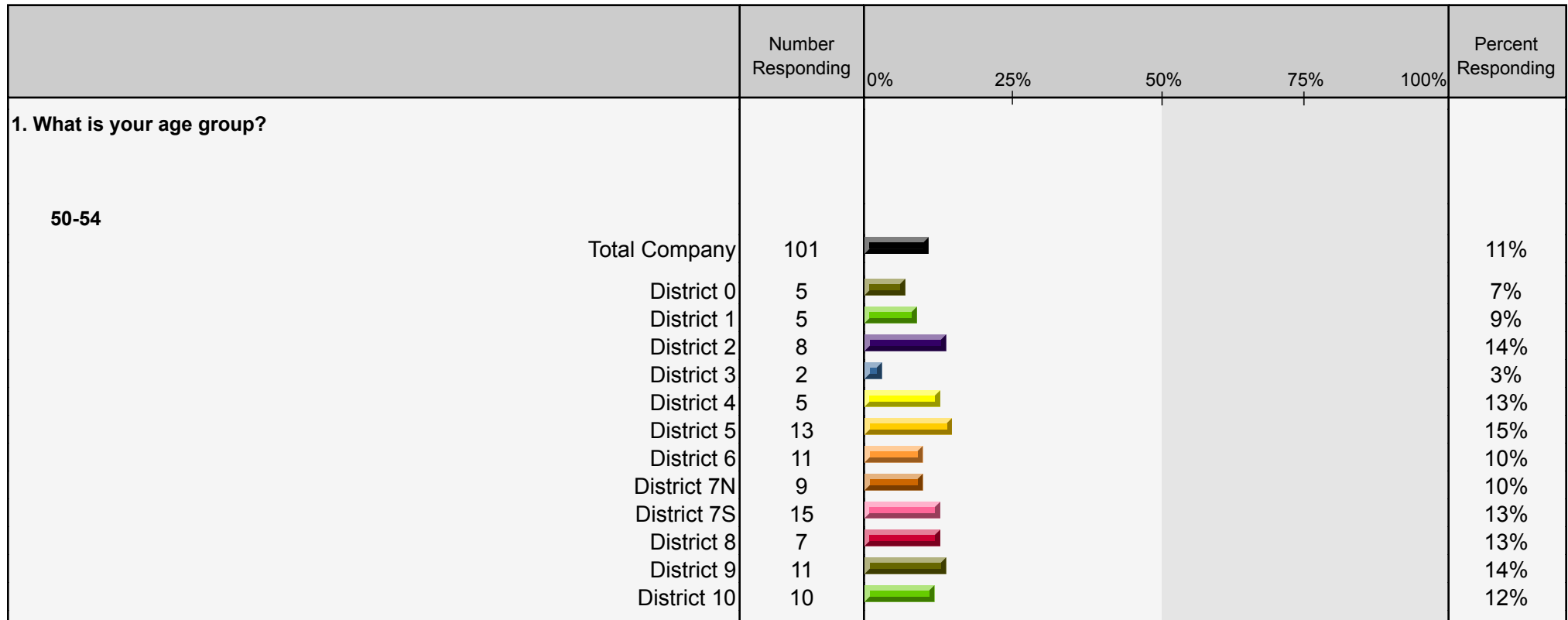
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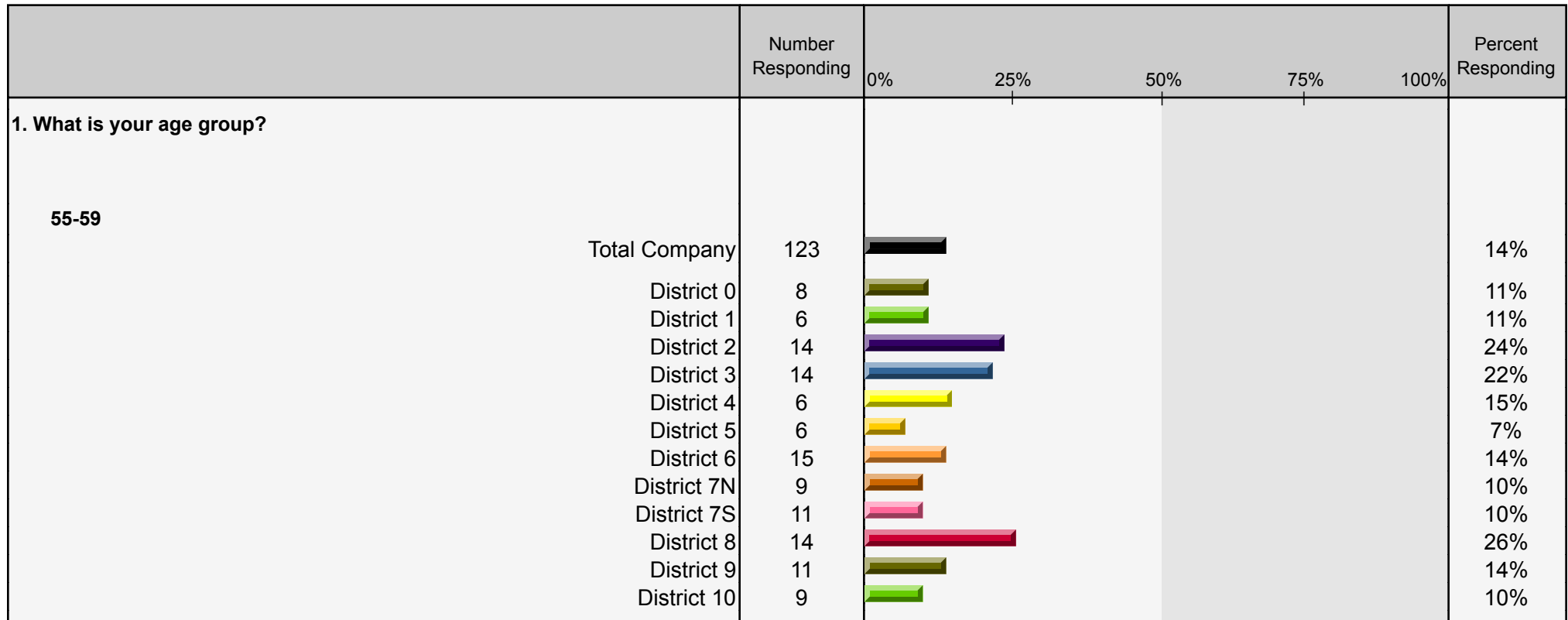
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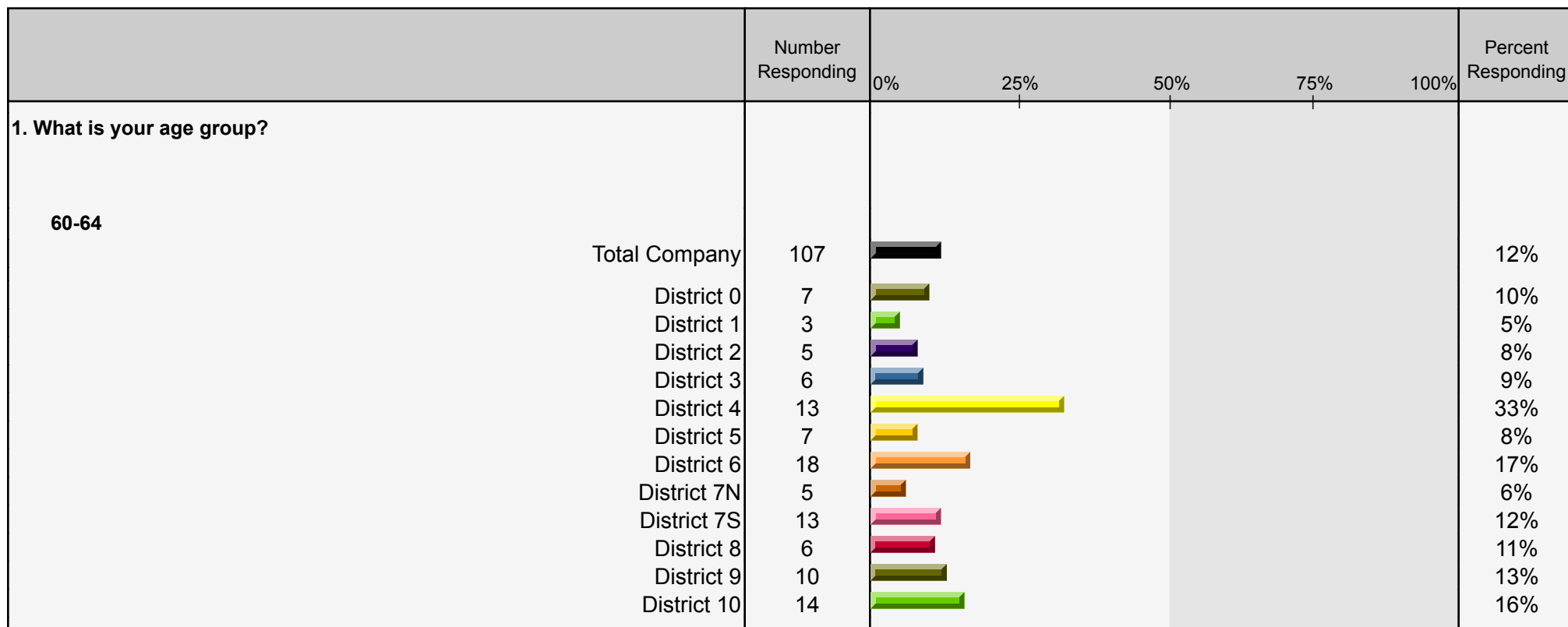
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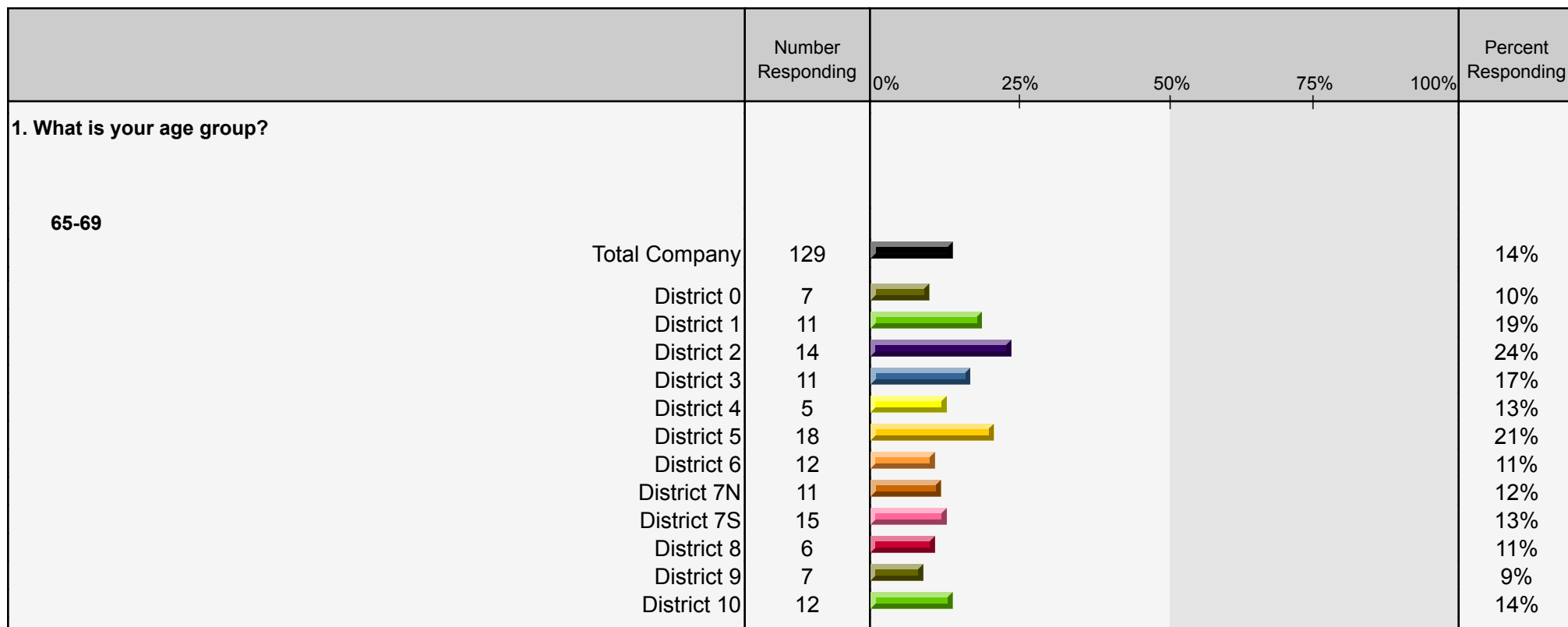
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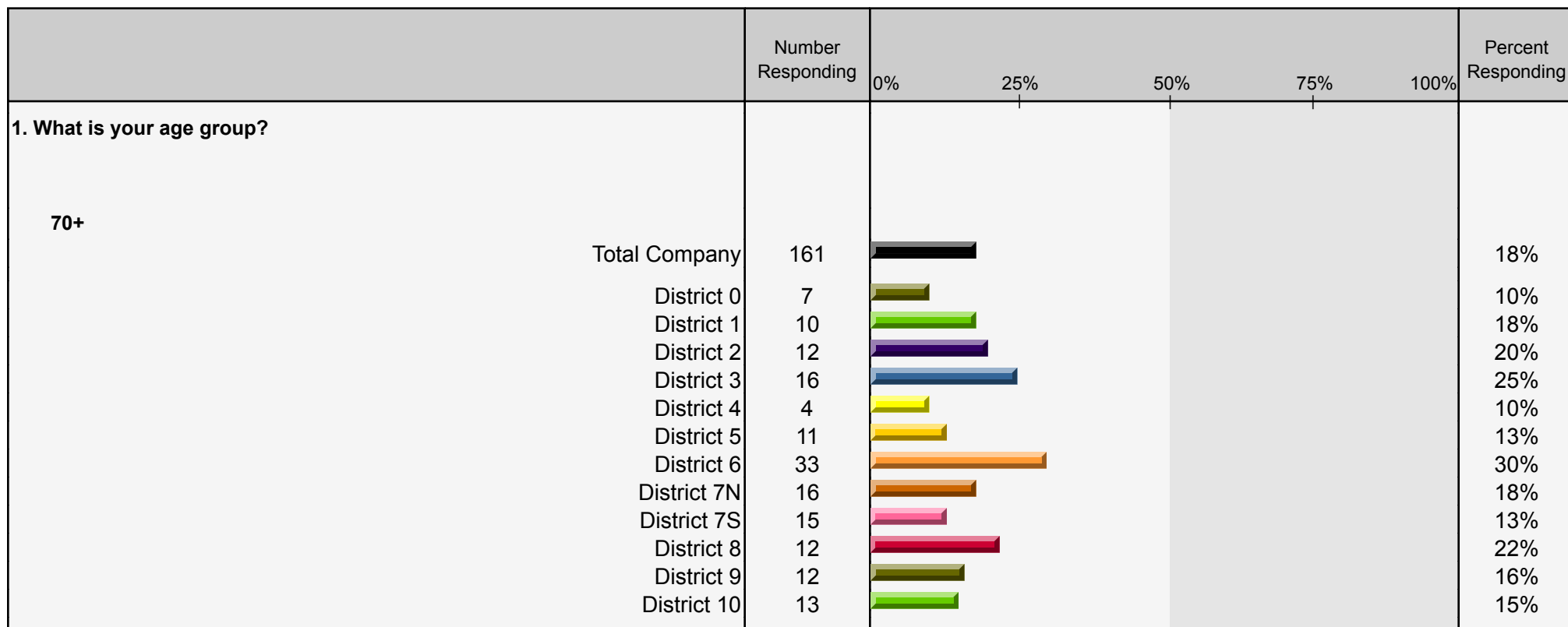
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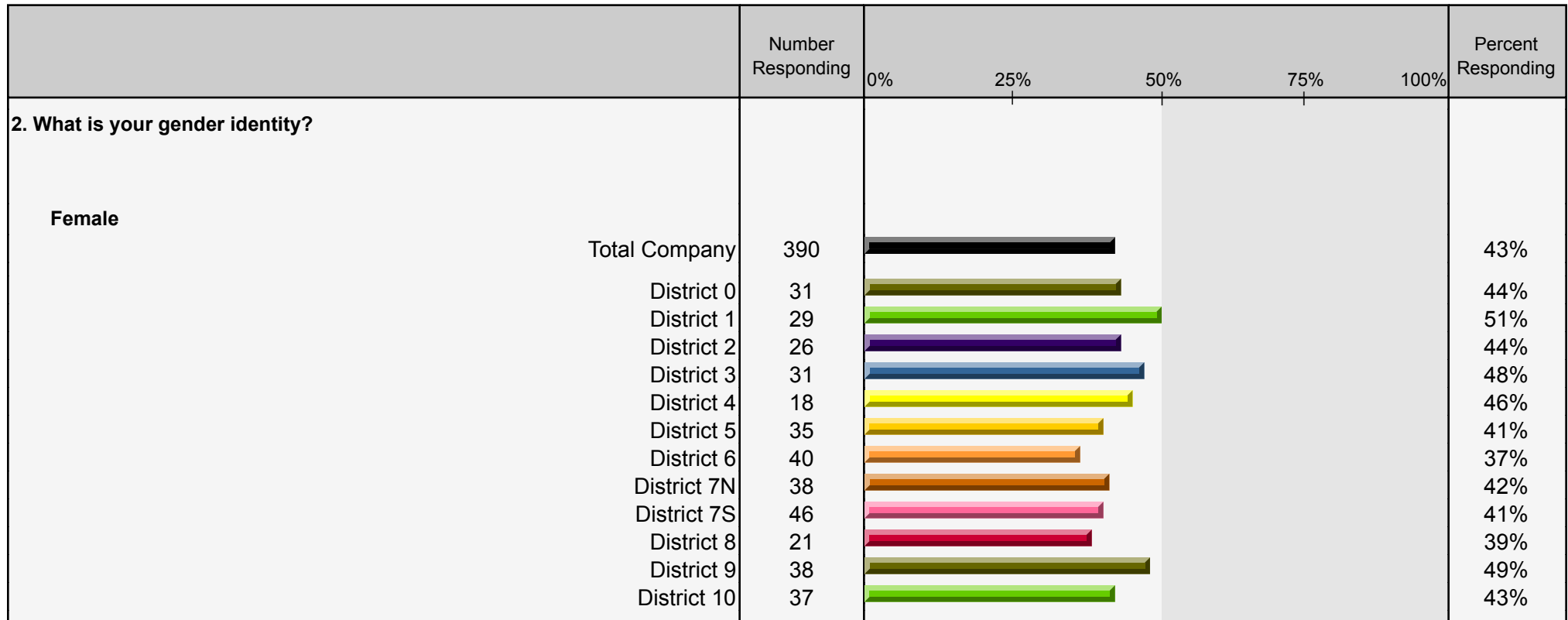
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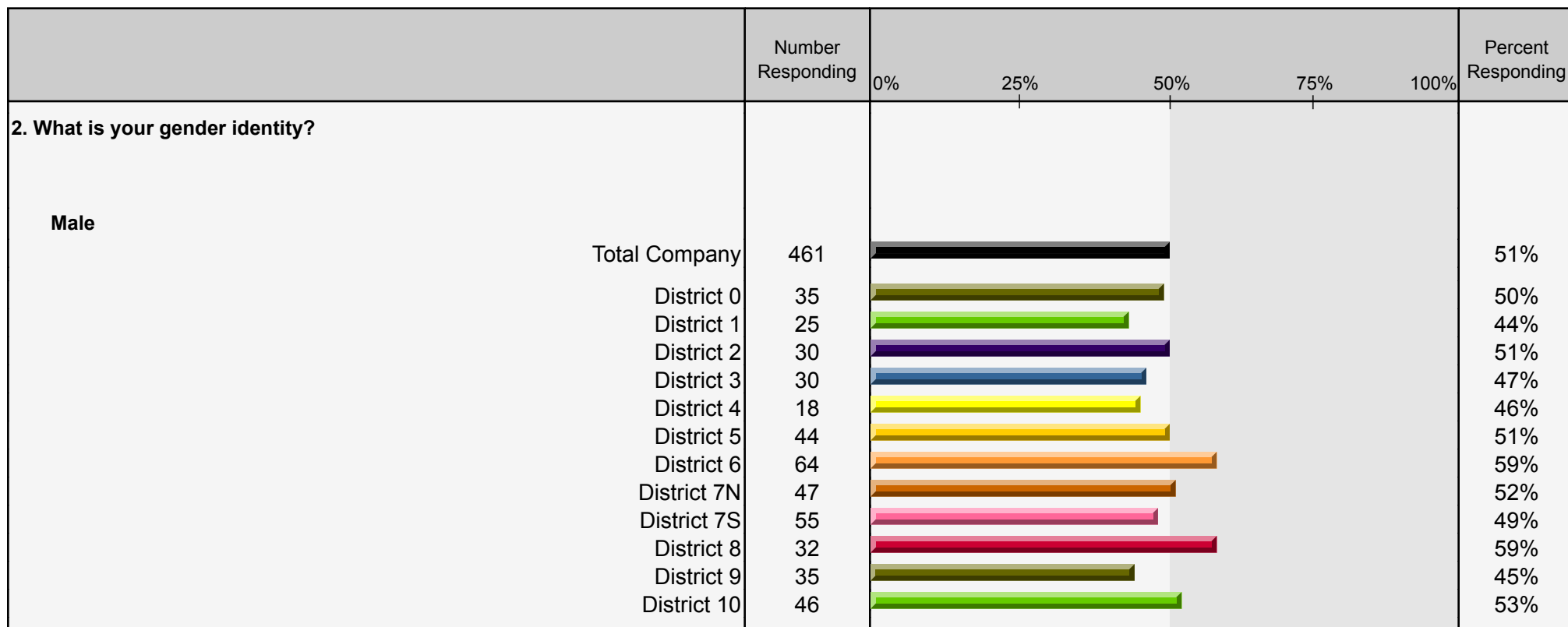
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Section II: Demographic







Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic





Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%25%50%75%100%	Percent Responding
2. What is your gender identity?				
Transgender	Total Company	4		0%
	District 0	0	No valid cases	0%
	District 1	0	No valid cases	0%
	District 2	0	No valid cases	0%
	District 3	1		2%
	District 4	1		3%
	District 5	0	No valid cases	0%
	District 6	0	No valid cases	0%
	District 7N	0	No valid cases	0%
	District 7S	1		1%
	District 8	0	No valid cases	0%
	District 9	0	No valid cases	0%
	District 10	1		1%





Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
2. What is your gender identity?								
Non-Binary / Non-Conforming								
	Total Company	3						0%
	District 0	2						3%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	0	No valid cases					0%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	1						1%
	District 10	0	No valid cases					0%














Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
2. What is your gender identity?								
Other (please specify)								
	Total Company	4						0%
	District 0	0	No valid cases					0%
	District 1	1						2%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	1						1%
	District 6	1						1%
	District 7N	0	No valid cases					0%
	District 7S	1						1%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%


Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

	Number Responding	0%25%50%75%100%	Percent Responding
2. What is your gender identity?			
Prefer not to disclose			
Total Company	41		5%
District 0	2		3%
District 1	2		4%
District 2	3		5%
District 3	2		3%
District 4	2		5%
District 5	6		7%
District 6	4		4%
District 7N	5		6%
District 7S	9		8%
District 8	1		2%
District 9	3		4%
District 10	2		2%




Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%25%50%75%100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:				
American Indian/Native American/Alaskan Native				
	Total Company	28		3%
	District 0	3		4%
	District 1	2		4%
	District 2	0	No valid cases	0%
	District 3	3		5%
	District 4	1		3%
	District 5	3		3%
	District 6	7		6%
	District 7N	2		2%
	District 7S	3		3%
	District 8	2		4%
	District 9	1		1%
	District 10	1		1%

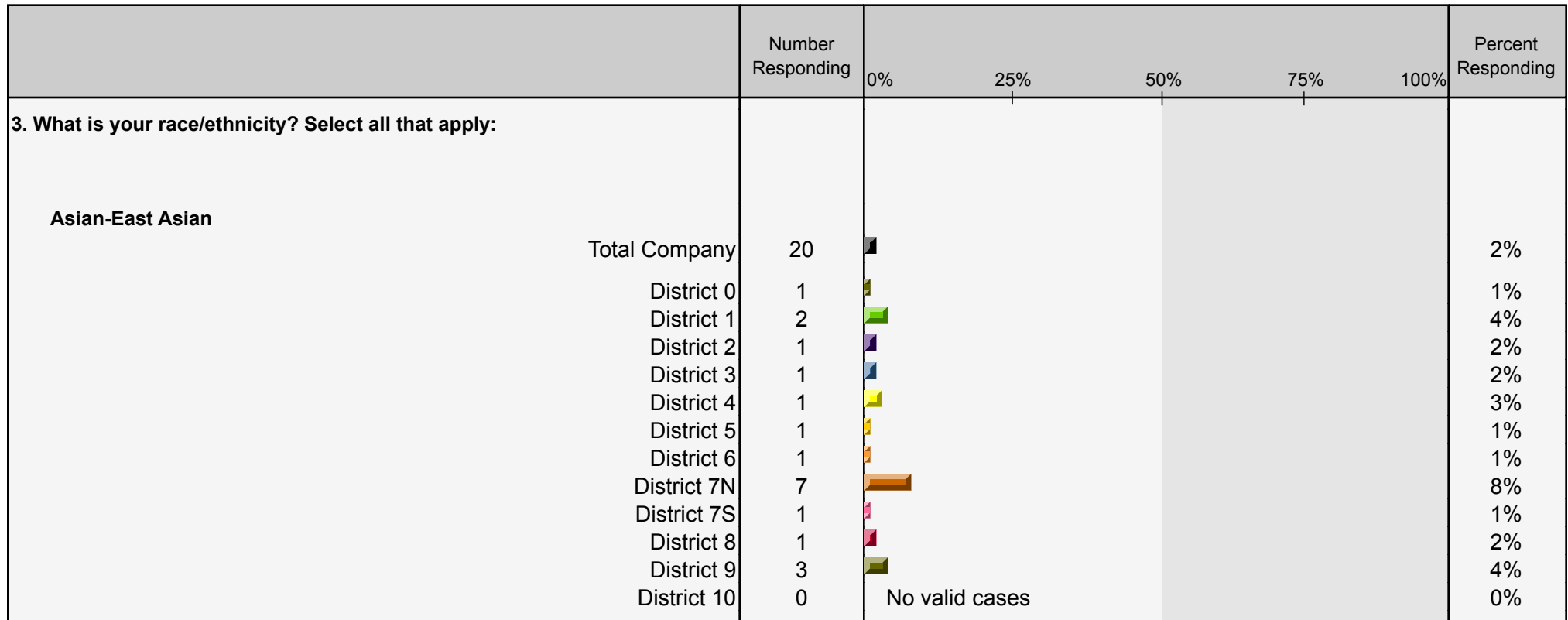
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:								
Asian-Central Asian								
	Total Company	4						0%
	District 0	0	No valid cases					0%
	District 1	0	No valid cases					0%
	District 2	2						3%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	1						1%
	District 7N	1						1%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%






Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic










Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:								
Asian-South Asian								
	Total Company	5						1%
	District 0	1						1%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	0	No valid cases					0%
	District 7N	1						1%
	District 7S	1						1%
	District 8	0	No valid cases					0%
	District 9	2						3%
	District 10	0	No valid cases					0%




Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%25%50%75%100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:				
Asian-Southeast Asian				
	Total Company	10		1%
	District 0	2		3%
	District 1	2		4%
	District 2	1		2%
	District 3	0	No valid cases	0%
	District 4	0	No valid cases	0%
	District 5	1		1%
	District 6	0	No valid cases	0%
	District 7N	2		2%
	District 7S	0	No valid cases	0%
	District 8	0	No valid cases	0%
	District 9	2		3%
	District 10	0	No valid cases	0%

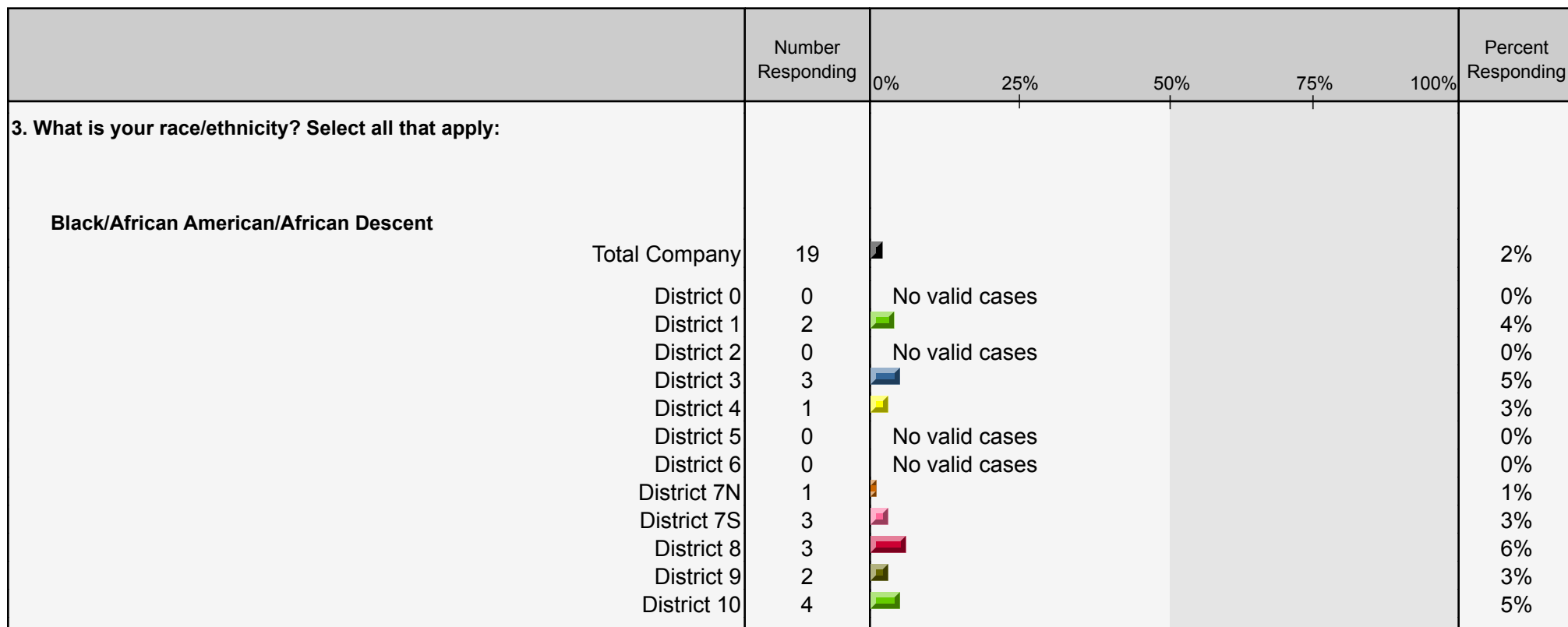
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:								
Asian-Unspecified								
	Total Company	4						0%
	District 0	0	No valid cases					0%
	District 1	1						2%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	1						1%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	2						3%
	District 10	0	No valid cases					0%

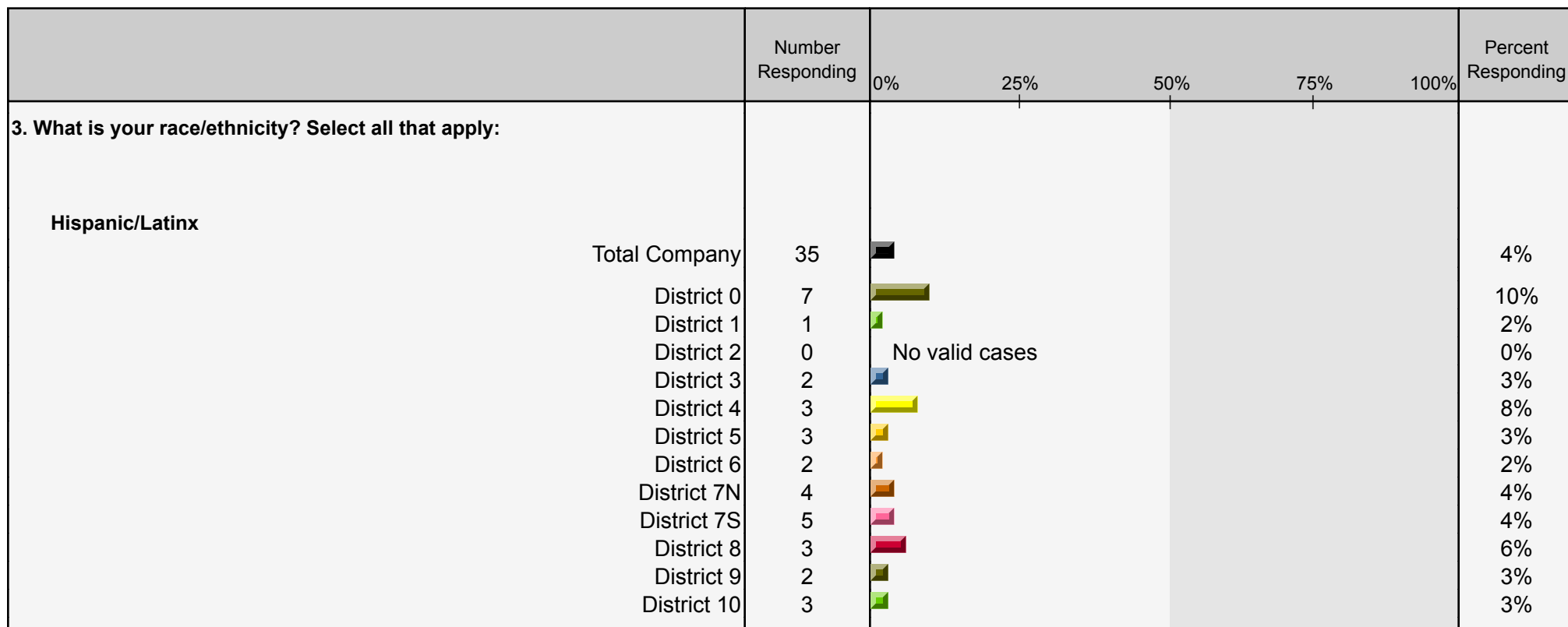
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic













Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic



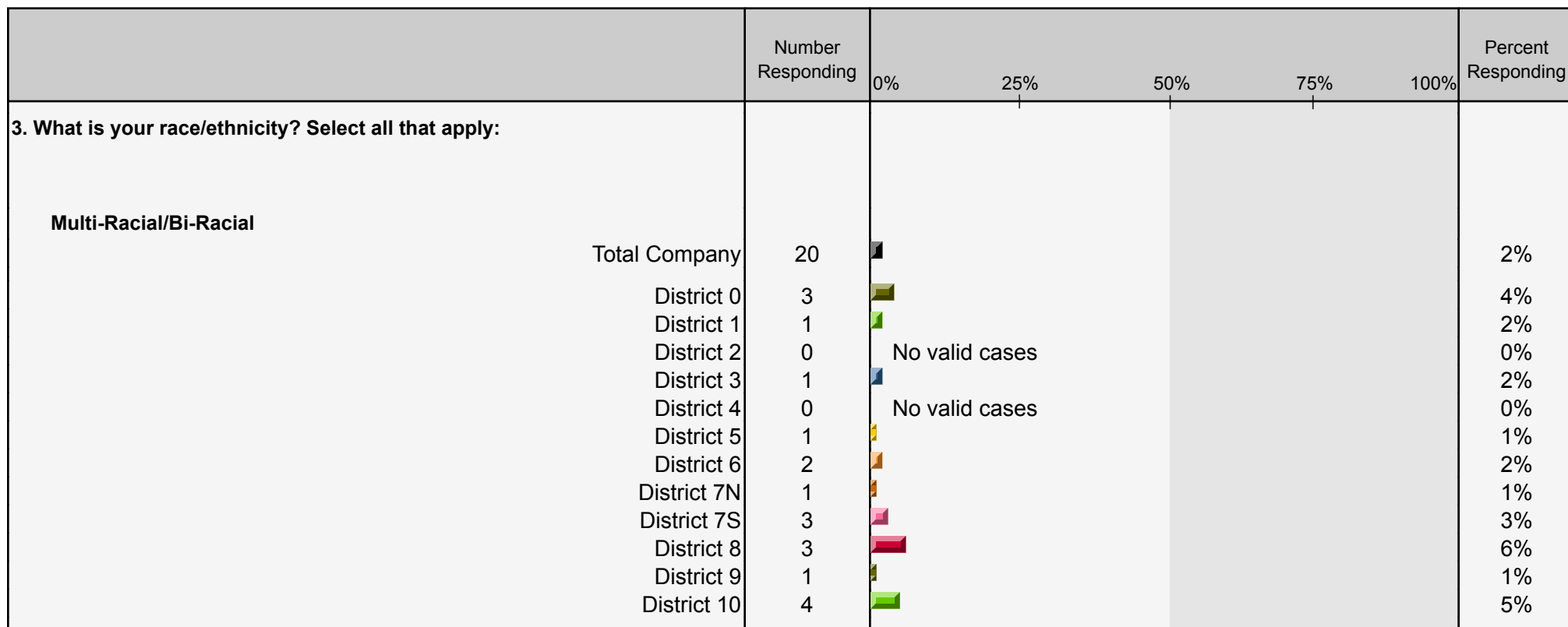
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%25%50%75%100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:				
Middle Eastern Descent				
	Total Company	14		2%
	District 0	1		1%
	District 1	2		4%
	District 2	0	No valid cases	0%
	District 3	1		2%
	District 4	0	No valid cases	0%
	District 5	2		2%
	District 6	3		3%
	District 7N	1		1%
	District 7S	2		2%
	District 8	1		2%
	District 9	0	No valid cases	0%
	District 10	1		1%



Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic



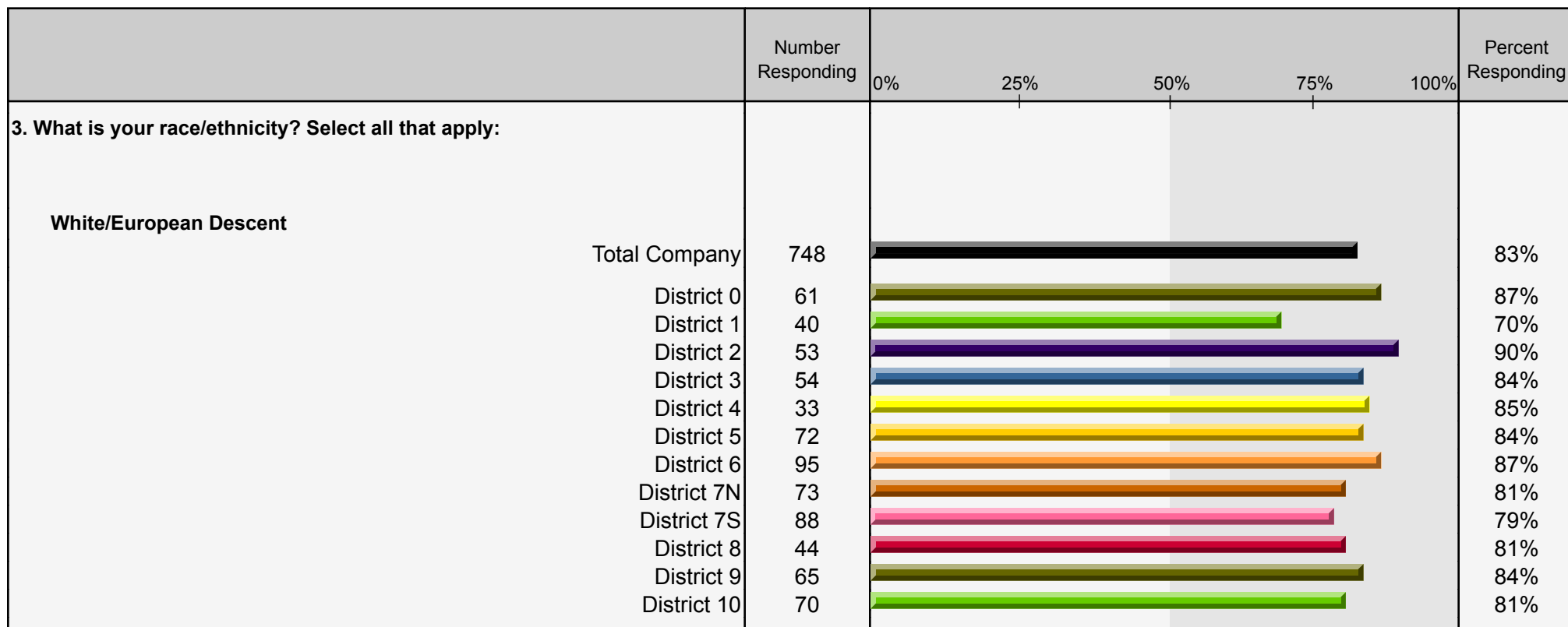
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:								
Pacific Islander/Native Hawaiian								
	Total Company	3						0%
	District 0	0	No valid cases					0%
	District 1	0	No valid cases					0%
	District 2	2						3%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	1						1%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%










Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic



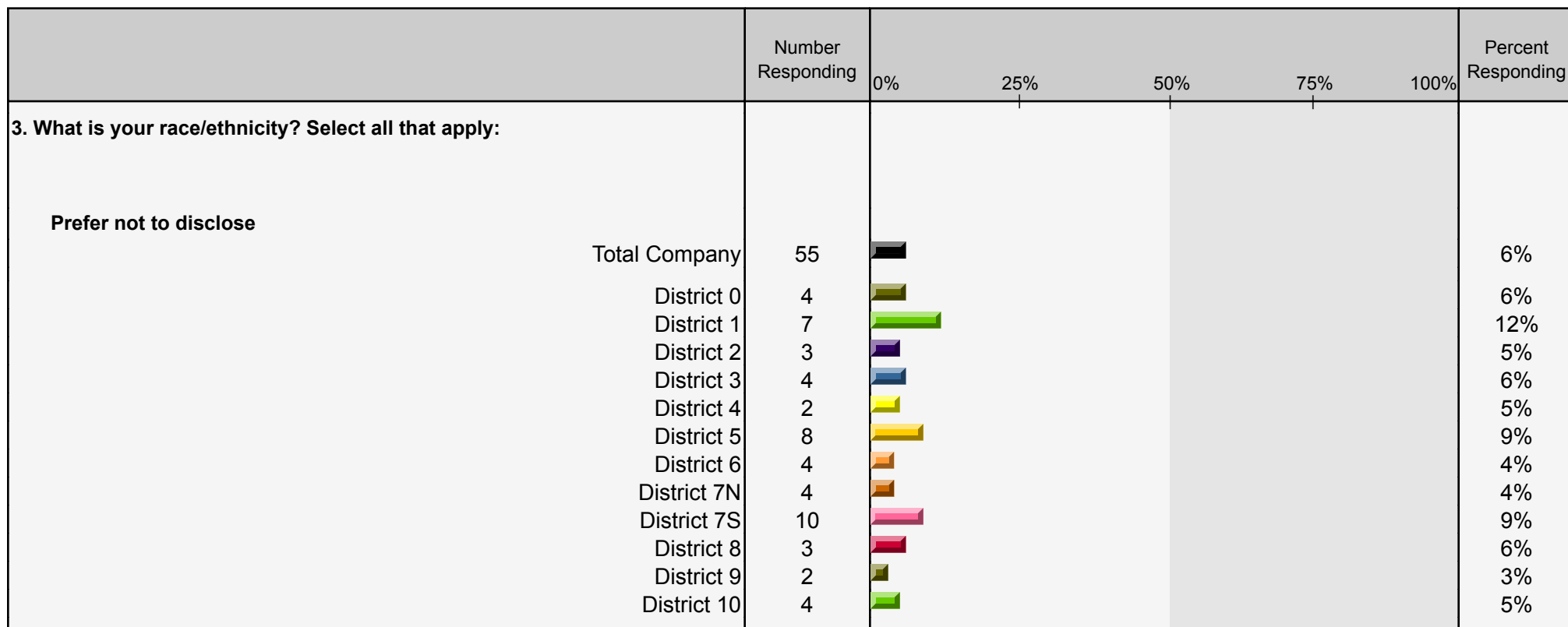
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

	Number Responding	0%25%50%75%100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:			
Other (please specify)			
Total Company	15		2%
District 0	0	No valid cases	0%
District 1	1		2%
District 2	2		3%
District 3	1		2%
District 4	1		3%
District 5	0	No valid cases	0%
District 6	2		2%
District 7N	0	No valid cases	0%
District 7S	3		3%
District 8	0	No valid cases	0%
District 9	2		3%
District 10	3		3%

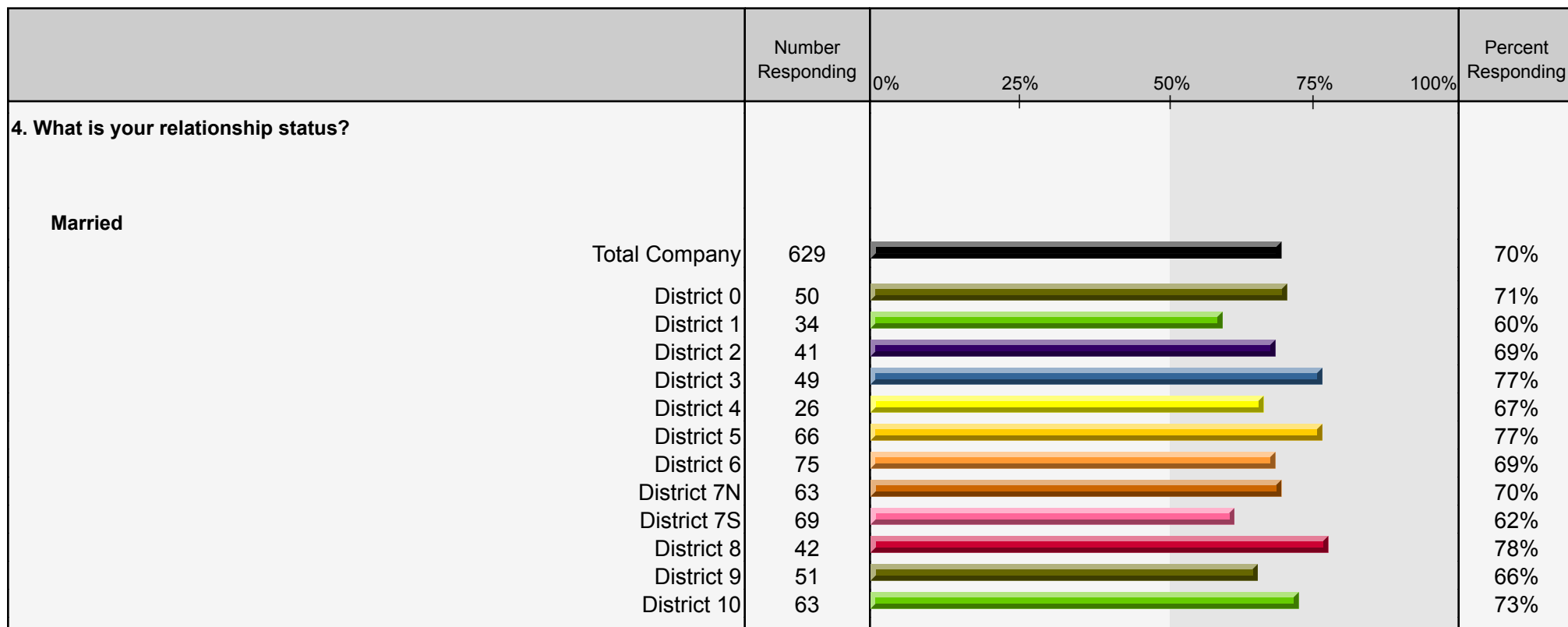
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic



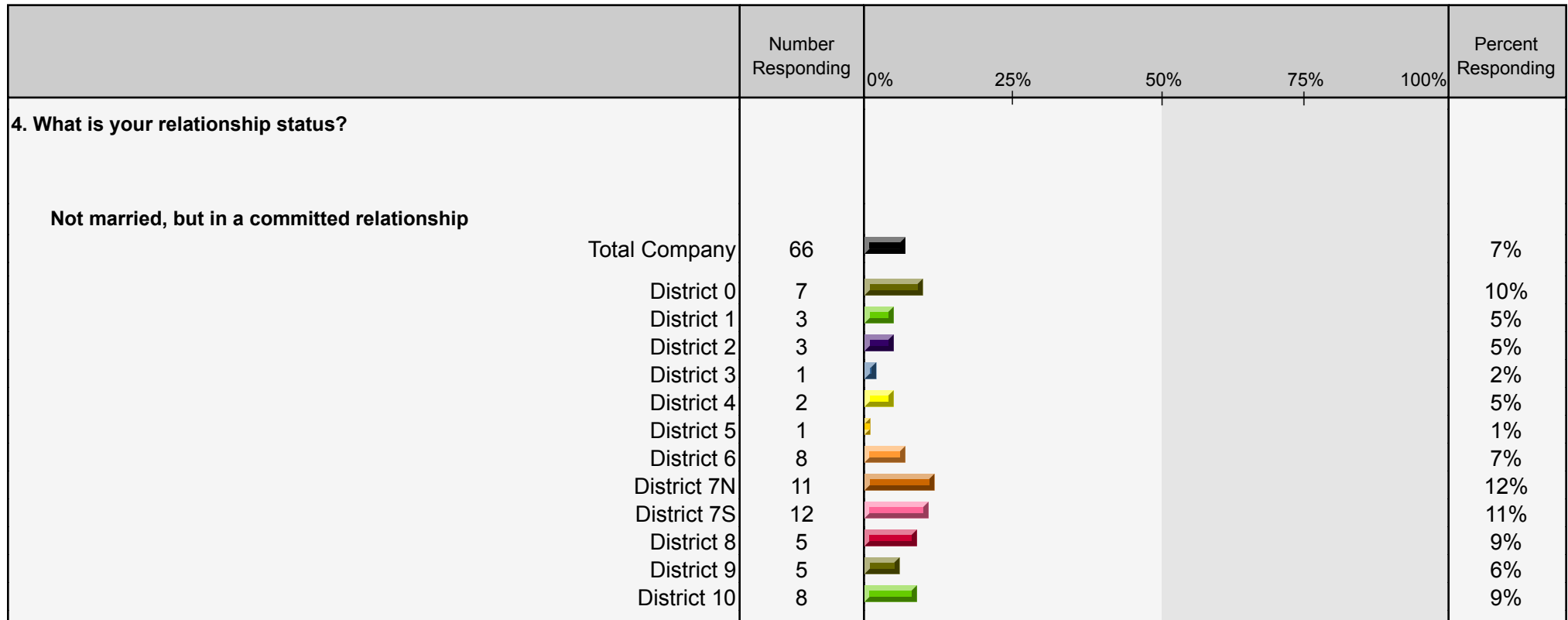
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Section II: Demographic



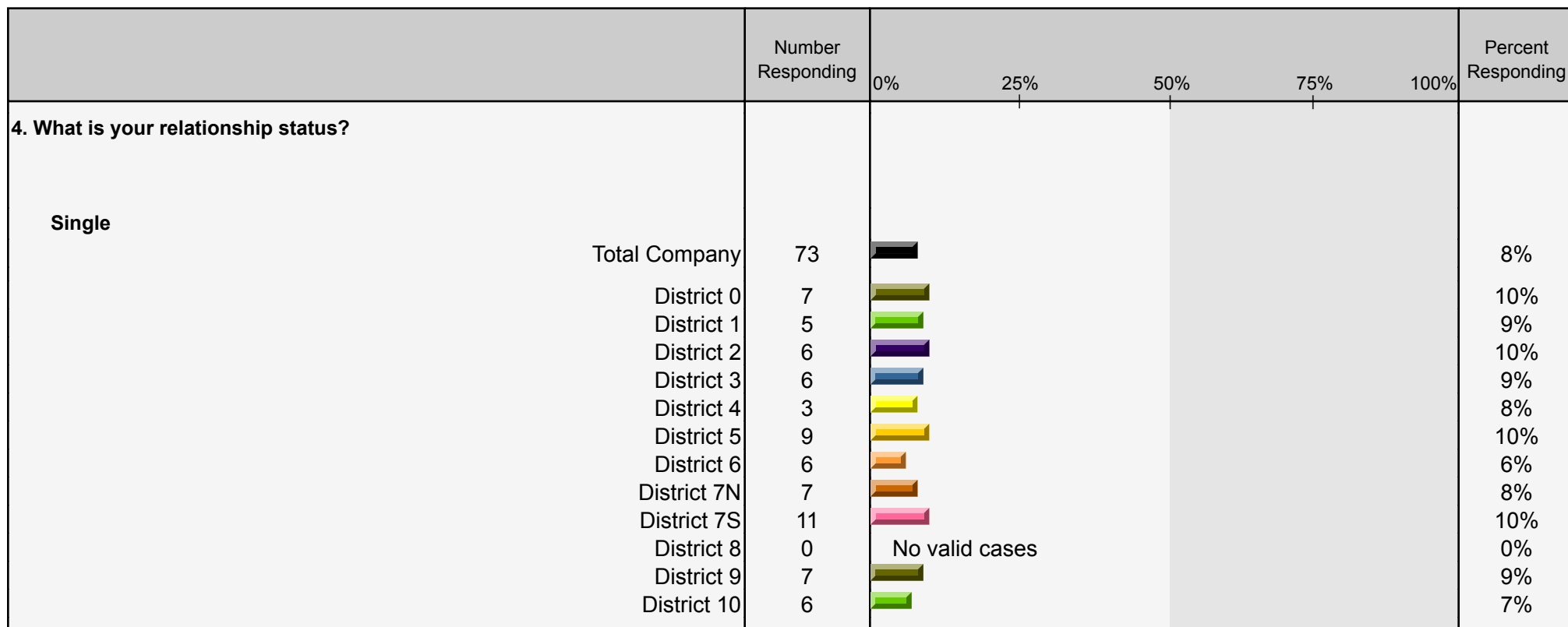
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Section II: Demographic



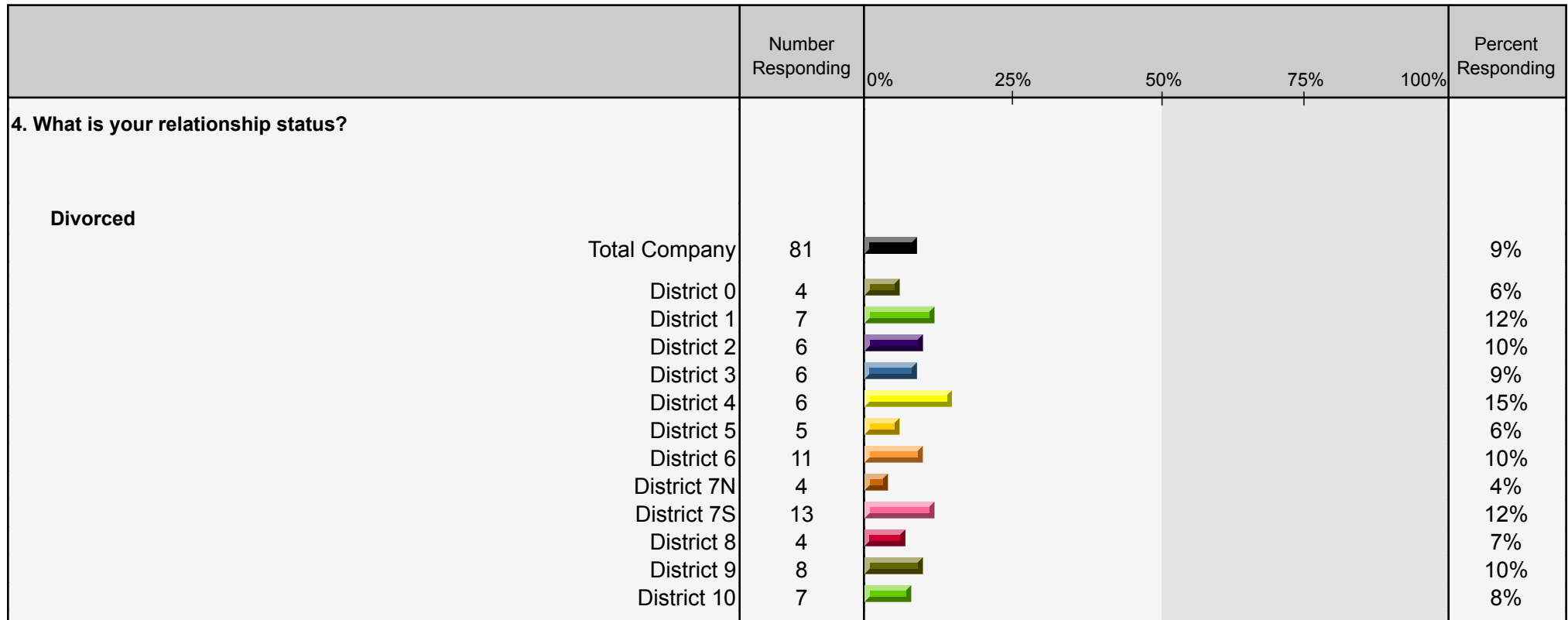
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic










Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic








Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%25%50%75%100%	Percent Responding
4. What is your relationship status?				
Widowed	Total Company	13		1%
	District 0	0	No valid cases	0%
	District 1	0	No valid cases	0%
	District 2	1		2%
	District 3	0	No valid cases	0%
	District 4	1		3%
	District 5	0	No valid cases	0%
	District 6	4		4%
	District 7N	2		2%
	District 7S	0	No valid cases	0%
	District 8	2		4%
	District 9	3		4%
	District 10	0	No valid cases	0%

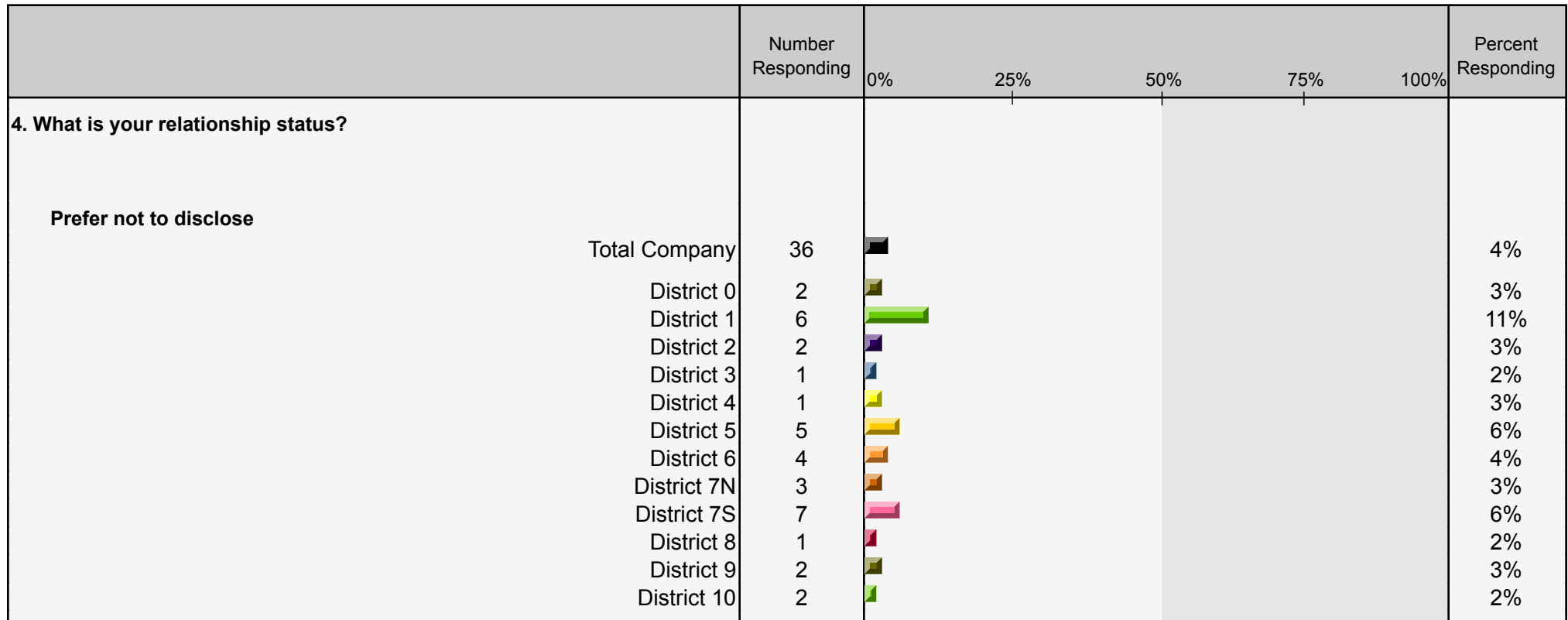
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

	Number Responding	0%25%50%75%100%					Percent Responding
4. What is your relationship status?							
Other (please specify)							
Total Company	5						1%
District 0	0	No valid cases					0%
District 1	2						4%
District 2	0	No valid cases					0%
District 3	1						2%
District 4	0	No valid cases					0%
District 5	0	No valid cases					0%
District 6	1						1%
District 7N	0	No valid cases					0%
District 7S	0	No valid cases					0%
District 8	0	No valid cases					0%
District 9	1						1%
District 10	0	No valid cases					0%

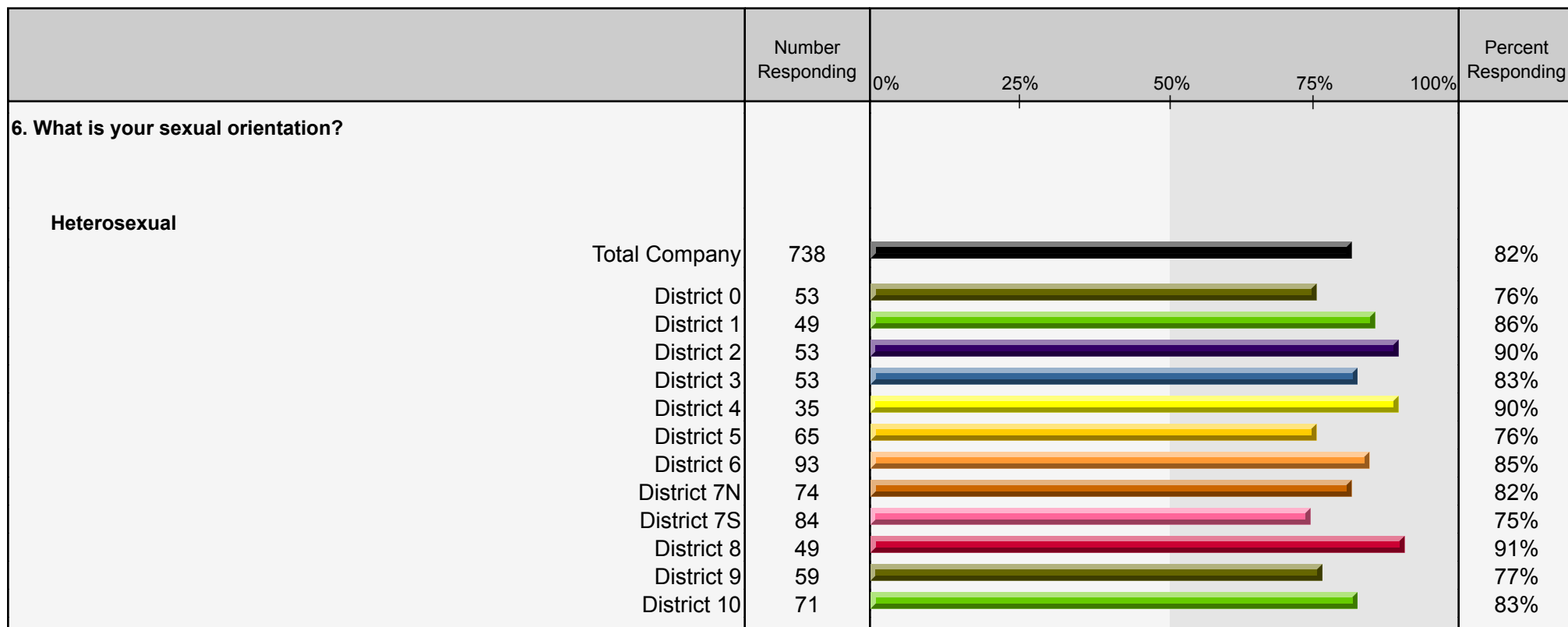
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic










Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic










Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%25%50%75%100%	Percent Responding
6. What is your sexual orientation?				
Gay	Total Company	13		1%
	District 0	3		4%
	District 1	0	No valid cases	0%
	District 2	0	No valid cases	0%
	District 3	1		2%
	District 4	0	No valid cases	0%
	District 5	0	No valid cases	0%
	District 6	1		1%
	District 7N	3		3%
	District 7S	4		4%
	District 8	0	No valid cases	0%
	District 9	0	No valid cases	0%
	District 10	1		1%



Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%25%50%75%100%	Percent Responding
6. What is your sexual orientation?				
Lesbian	Total Company	6		1%
	District 0	0	No valid cases	0%
	District 1	0	No valid cases	0%
	District 2	0	No valid cases	0%
	District 3	0	No valid cases	0%
	District 4	0	No valid cases	0%
	District 5	1		1%
	District 6	1		1%
	District 7N	0	No valid cases	0%
	District 7S	1		1%
	District 8	1		2%
	District 9	1		1%
	District 10	1		1%













Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
6. What is your sexual orientation?								
Asexual	Total Company	4						0%
	District 0	0	No valid cases					0%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	3						3%
	District 6	0	No valid cases					0%
	District 7N	0	No valid cases					0%
	District 7S	1						1%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%



Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%25%50%75%100%	Percent Responding
6. What is your sexual orientation?				
Bisexual	Total Company	24		3%
	District 0	3		4%
	District 1	0	No valid cases	0%
	District 2	1		2%
	District 3	2		3%
	District 4	1		3%
	District 5	4		5%
	District 6	1		1%
	District 7N	1		1%
	District 7S	5		4%
	District 8	2		4%
	District 9	2		3%
	District 10	2		2%

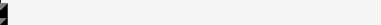





Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%25%50%75%100%	Percent Responding
6. What is your sexual orientation?				
Pansexual	Total Company	3		0%
	District 0	2		3%
	District 1	0	No valid cases	0%
	District 2	0	No valid cases	0%
	District 3	0	No valid cases	0%
	District 4	0	No valid cases	0%
	District 5	0	No valid cases	0%
	District 6	0	No valid cases	0%
	District 7N	0	No valid cases	0%
	District 7S	1		1%
	District 8	0	No valid cases	0%
	District 9	0	No valid cases	0%
	District 10	0	No valid cases	0%

Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%25%50%75%100%	Percent Responding
6. What is your sexual orientation?				
Queer	Total Company	10		1%
	District 0	0	No valid cases	0%
	District 1	0	No valid cases	0%
	District 2	1		2%
	District 3	0	No valid cases	0%
	District 4	0	No valid cases	0%
	District 5	0	No valid cases	0%
	District 6	0	No valid cases	0%
	District 7N	4		4%
	District 7S	2		2%
	District 8	0	No valid cases	0%
	District 9	1		1%
	District 10	2		2%







Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
6. What is your sexual orientation?								
Questioning or unsure								
	Total Company	2						0%
	District 0	0	No valid cases					0%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	1						1%
	District 6	0	No valid cases					0%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	1						1%

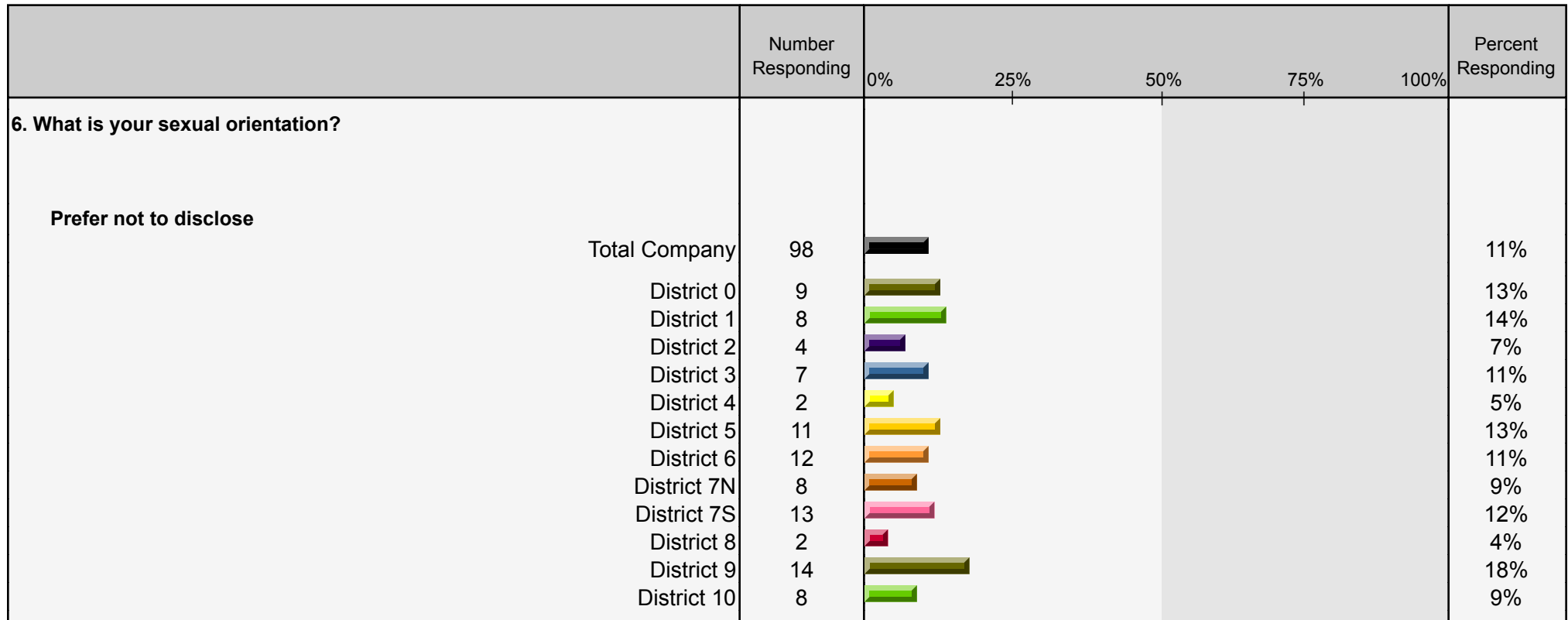
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic

	Number Responding	0%25%50%75%100%	Percent Responding
6. What is your sexual orientation?			
An identity not listed: please specify			
Total Company	5		1%
District 0	0	No valid cases	0%
District 1	0	No valid cases	0%
District 2	0	No valid cases	0%
District 3	1		2%
District 4	1		3%
District 5	1		1%
District 6	1		1%
District 7N	0	No valid cases	0%
District 7S	1		1%
District 8	0	No valid cases	0%
District 9	0	No valid cases	0%
District 10	0	No valid cases	0%














Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section II: Demographic



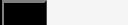












Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

Items	Number Responding	Mean	Mean Graph		No	Yes
			N	Y		
18. Does your employer have a minimum billable hour expectation?						
Total Company	898	1.14			86%	14%
District 0	70	1.27			73%	27%
District 1	57	1.12			88%	12%
District 2	58	1.07			93%	7%
District 3	62	1.08			92%	8%
District 4	39	1.05			95%	5%
District 5	86	1.12			88%	12%
District 6	109	1.07			93%	7%
District 7N	90	1.26			74%	26%
District 7S	111	1.20			80%	20%
District 8	53	1.17			83%	17%
District 9	77	1.10			90%	10%
District 10	86	1.08			92%	8%














Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

Items	Number Responding	Mean	Mean Graph		No	Yes
			N	Y		
36. Do you want to skip these questions?						
Total Company	894	1.17			83%	17%
District 0	70	1.10			90%	10%
District 1	57	1.21			79%	21%
District 2	58	1.17			83%	17%
District 3	61	1.11			89%	11%
District 4	39	1.10			90%	10%
District 5	86	1.21			79%	21%
District 6	109	1.20			80%	20%
District 7N	89	1.18			82%	18%
District 7S	110	1.18			82%	18%
District 8	53	1.21			79%	21%
District 9	76	1.16			84%	16%
District 10	86	1.19			81%	19%

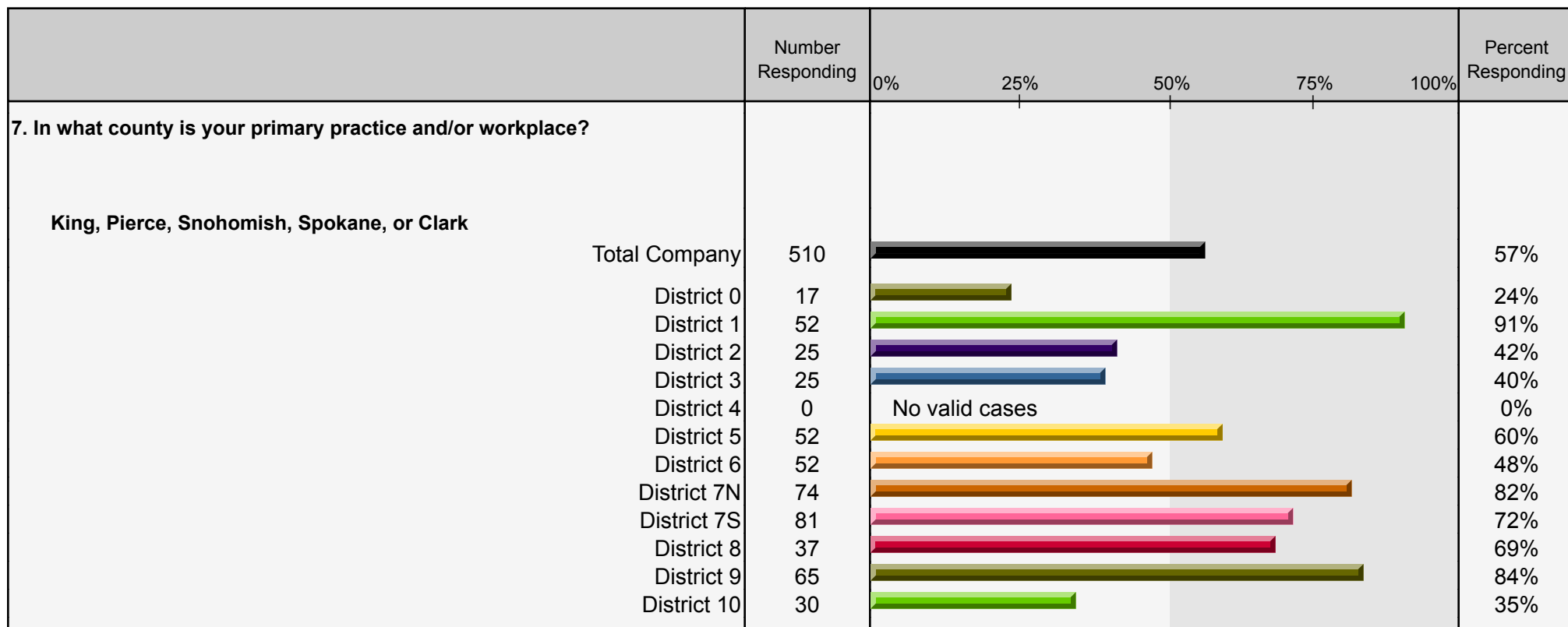
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

Items	Number Responding	Mean	Mean Graph	No	Yes
51. Have you utilized any wellness programs offered by your employer?					
Total Company	358	1.51		49%	51%
District 0	41	1.39		61%	39%
District 1	21	1.71		29%	71%
District 2	24	1.54		46%	54%
District 3	17	1.65		35%	65%
District 4	15	1.47		53%	47%
District 5	31	1.48		52%	48%
District 6	34	1.56		44%	56%
District 7N	36	1.61		39%	61%
District 7S	56	1.46		54%	46%
District 8	23	1.43		57%	43%
District 9	27	1.63		37%	63%
District 10	33	1.39		61%	39%

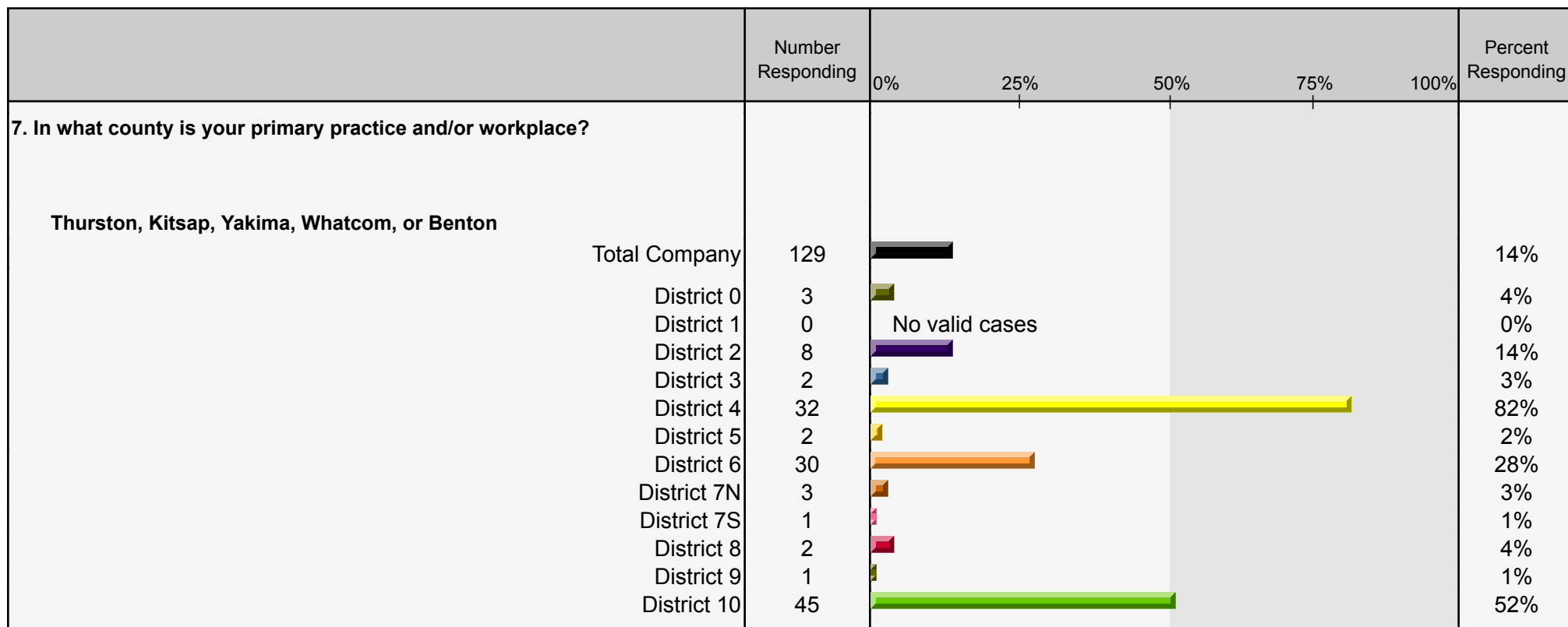
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Section III: Client Specific



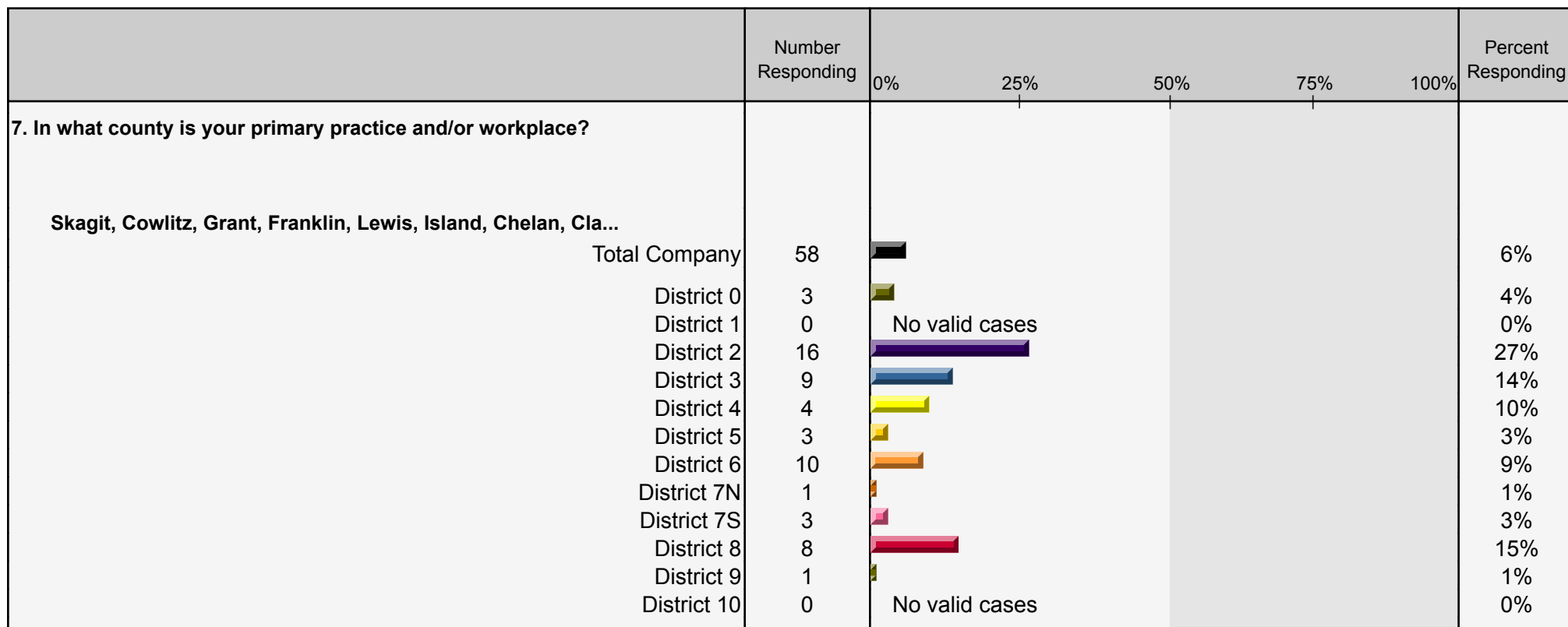
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific











Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific







Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

	Number Responding	0%25%50%75%100%	Percent Responding
7. In what county is your primary practice and/or workplace?			
Stevens, Whitman, Kittitas, Douglas, Okanogan, Jefferson, Pa...			
Total Company	17		2%
District 0	2		3%
District 1	0	No valid cases	0%
District 2	0	No valid cases	0%
District 3	2		3%
District 4	3		8%
District 5	4		5%
District 6	2		2%
District 7N	0	No valid cases	0%
District 7S	1		1%
District 8	3		6%
District 9	0	No valid cases	0%
District 10	0	No valid cases	0%

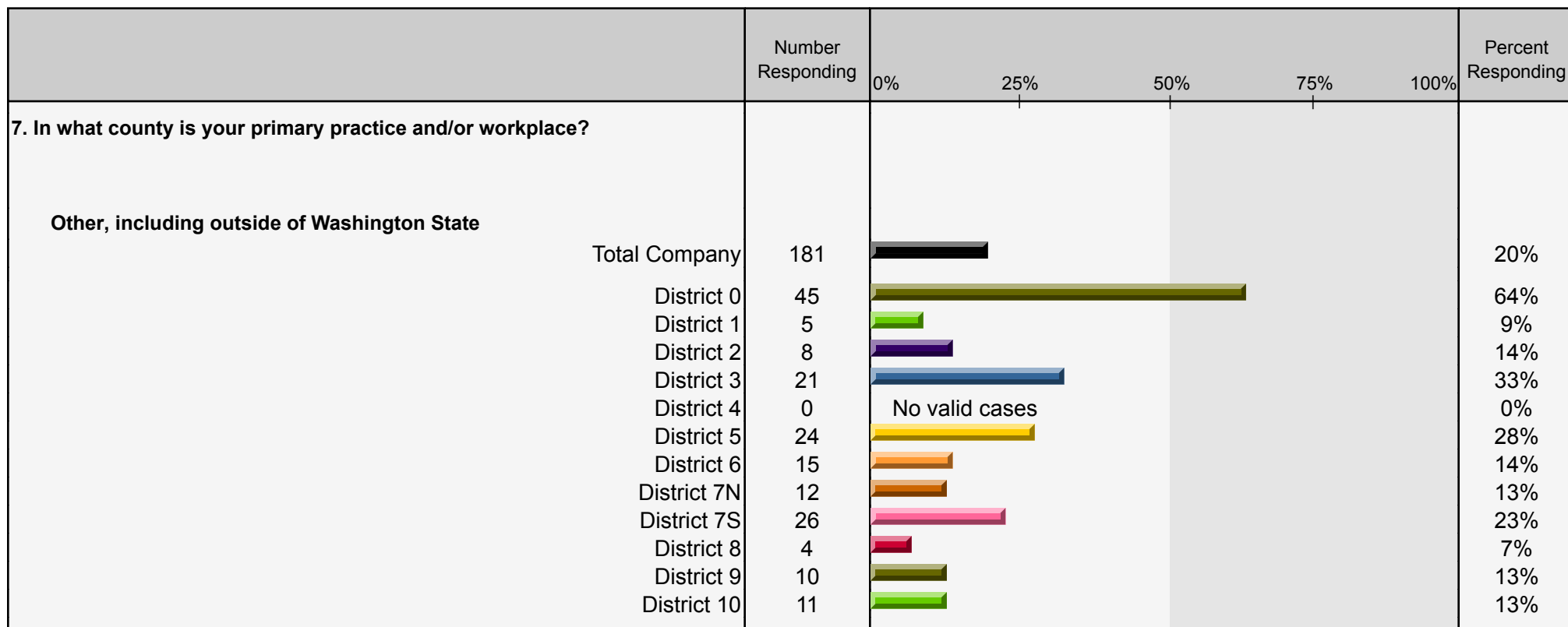
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

	Number Responding	0%25%50%75%100%	Percent Responding
7. In what county is your primary practice and/or workplace?			
San Juan, Pend Oreille, Skamania, Lincoln, Ferry, Wahkiakum,...			
Total Company	7		1%
District 0	0	No valid cases	0%
District 1	0	No valid cases	0%
District 2	2		3%
District 3	4		6%
District 4	0	No valid cases	0%
District 5	1		1%
District 6	0	No valid cases	0%
District 7N	0	No valid cases	0%
District 7S	0	No valid cases	0%
District 8	0	No valid cases	0%
District 9	0	No valid cases	0%
District 10	0	No valid cases	0%

Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



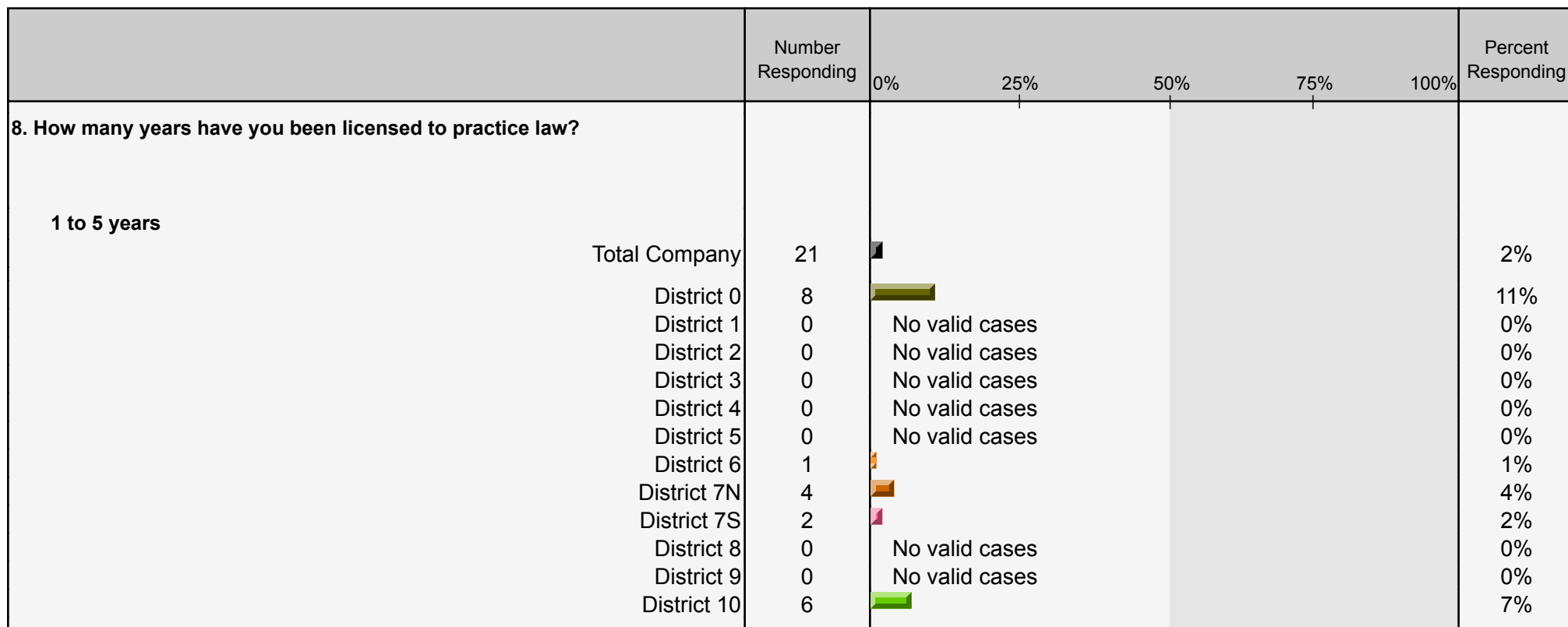
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
8. How many years have you been licensed to practice law?								
Less than 1								
	Total Company	0	No valid cases					0%
	District 0	0	No valid cases					0%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	0	No valid cases					0%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%

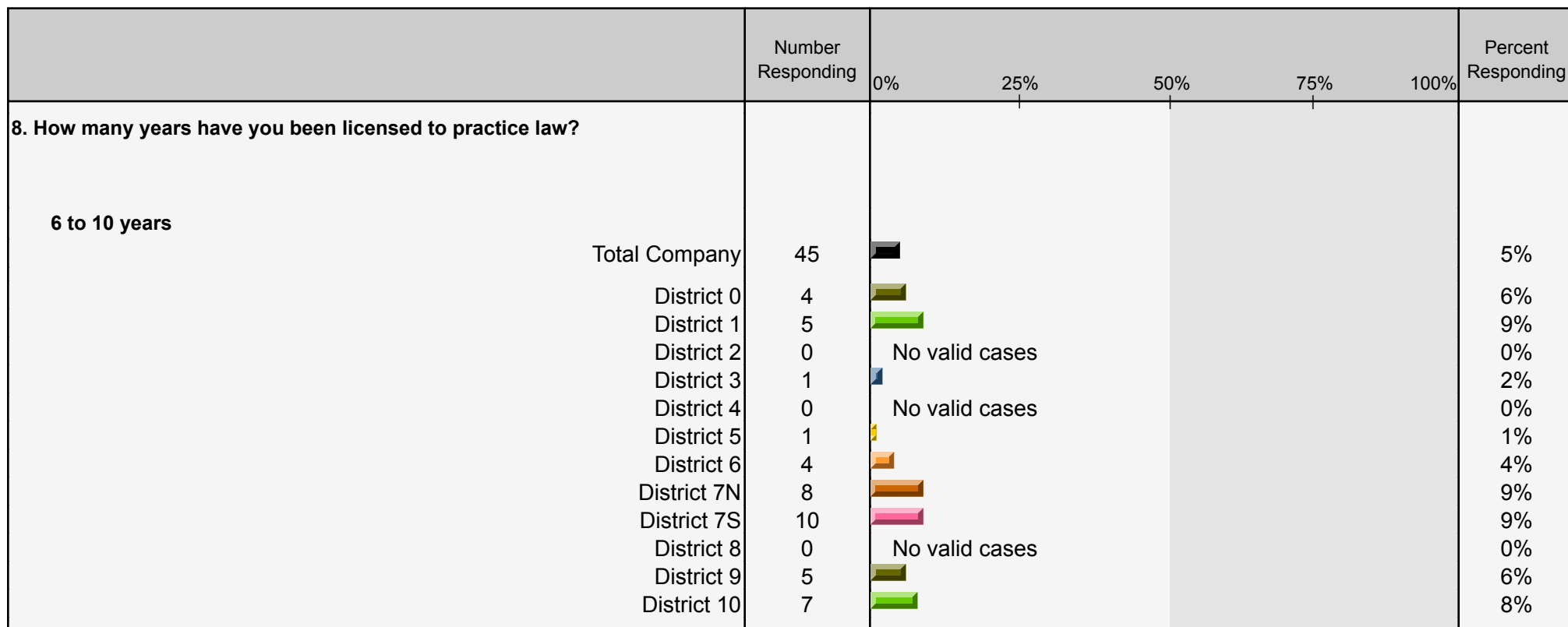
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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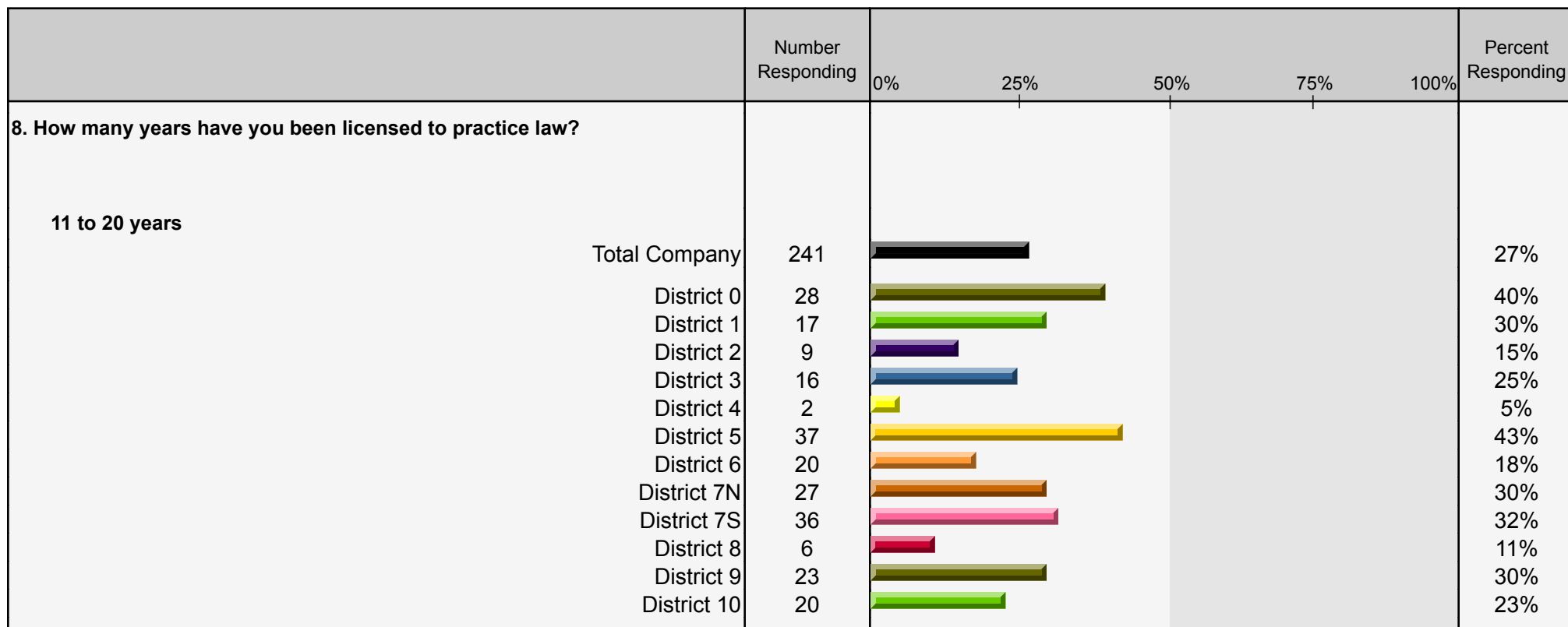
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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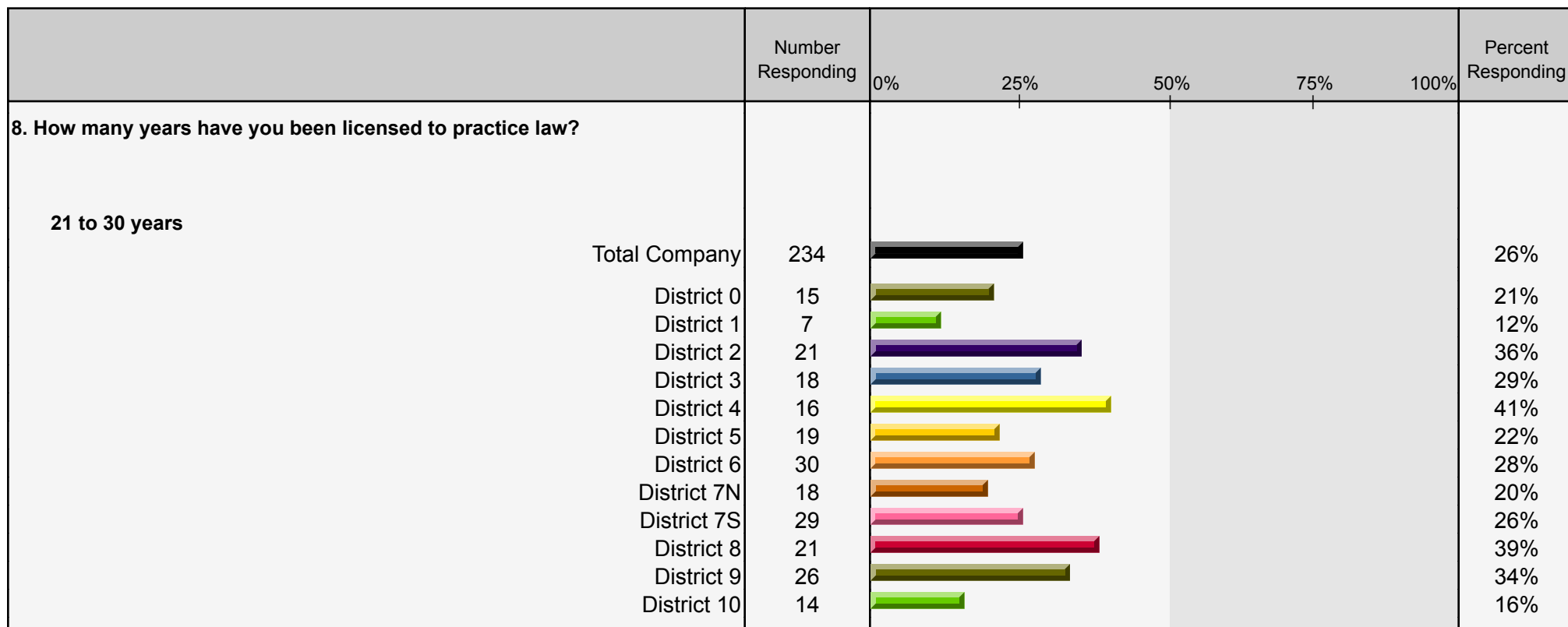
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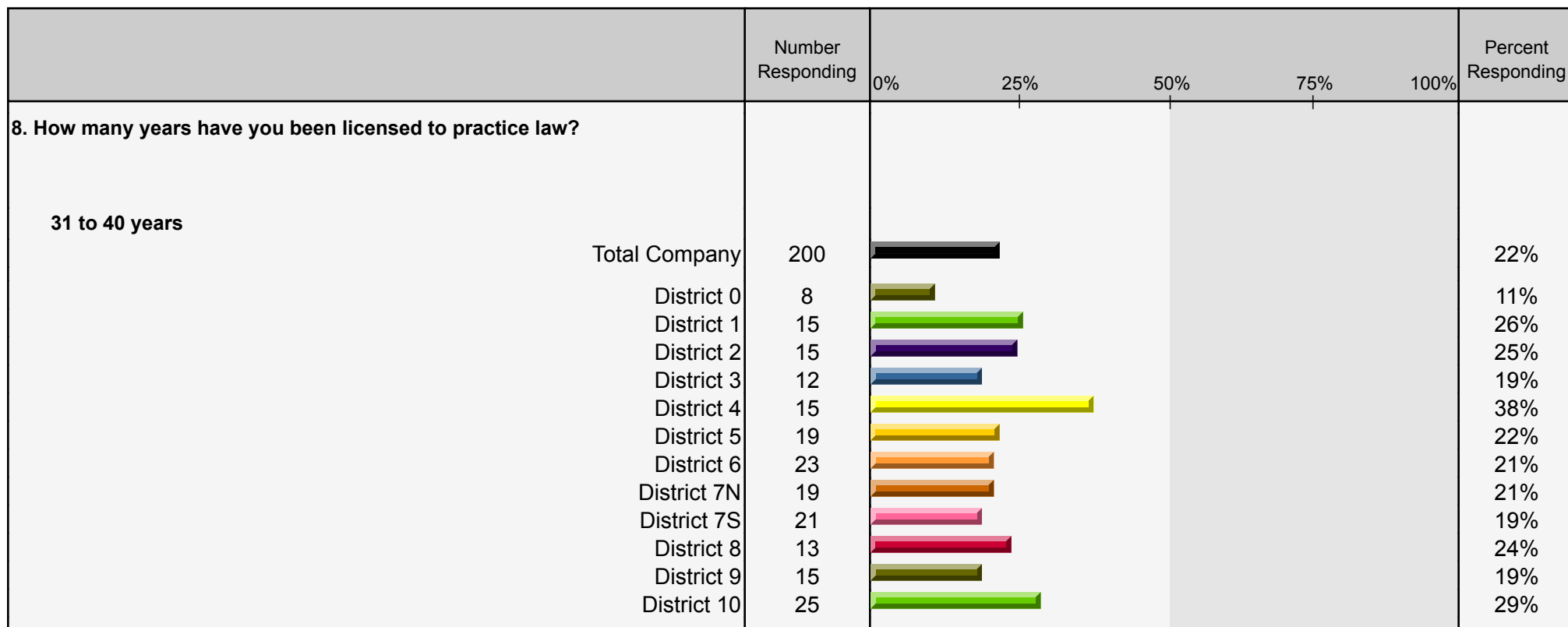
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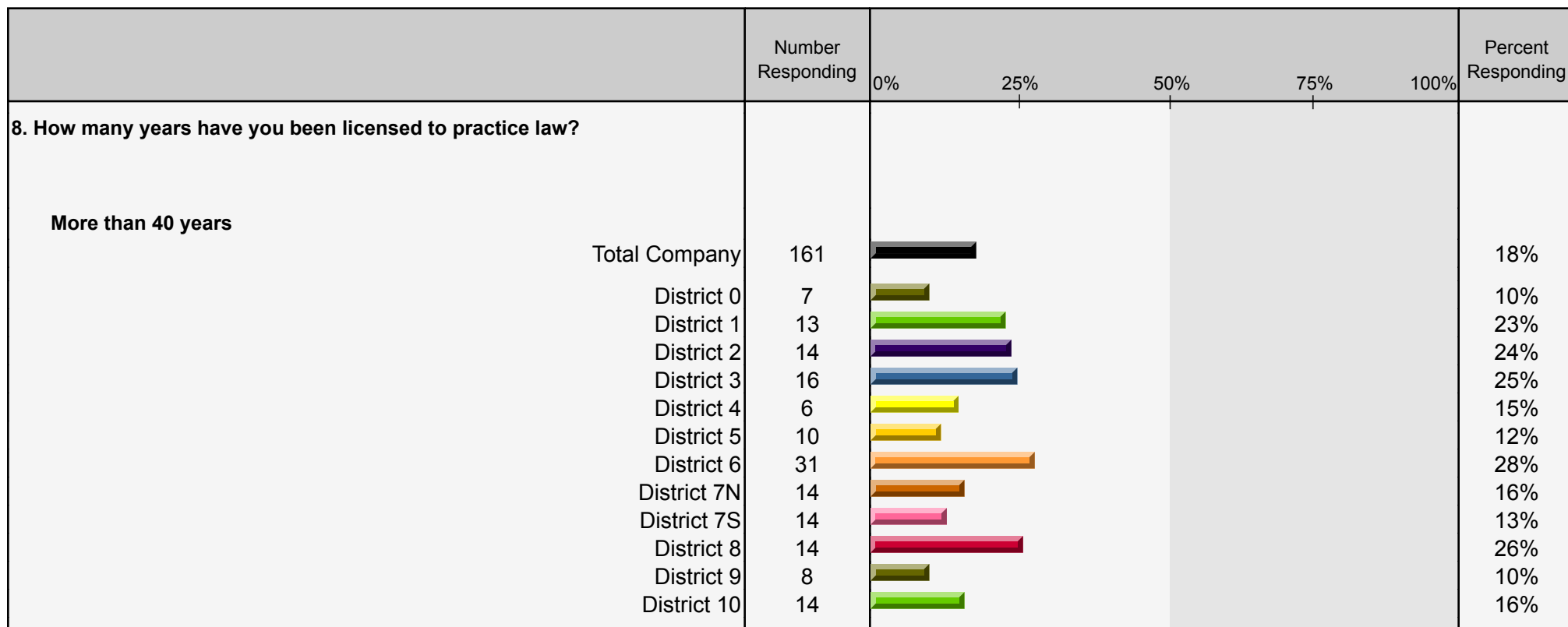
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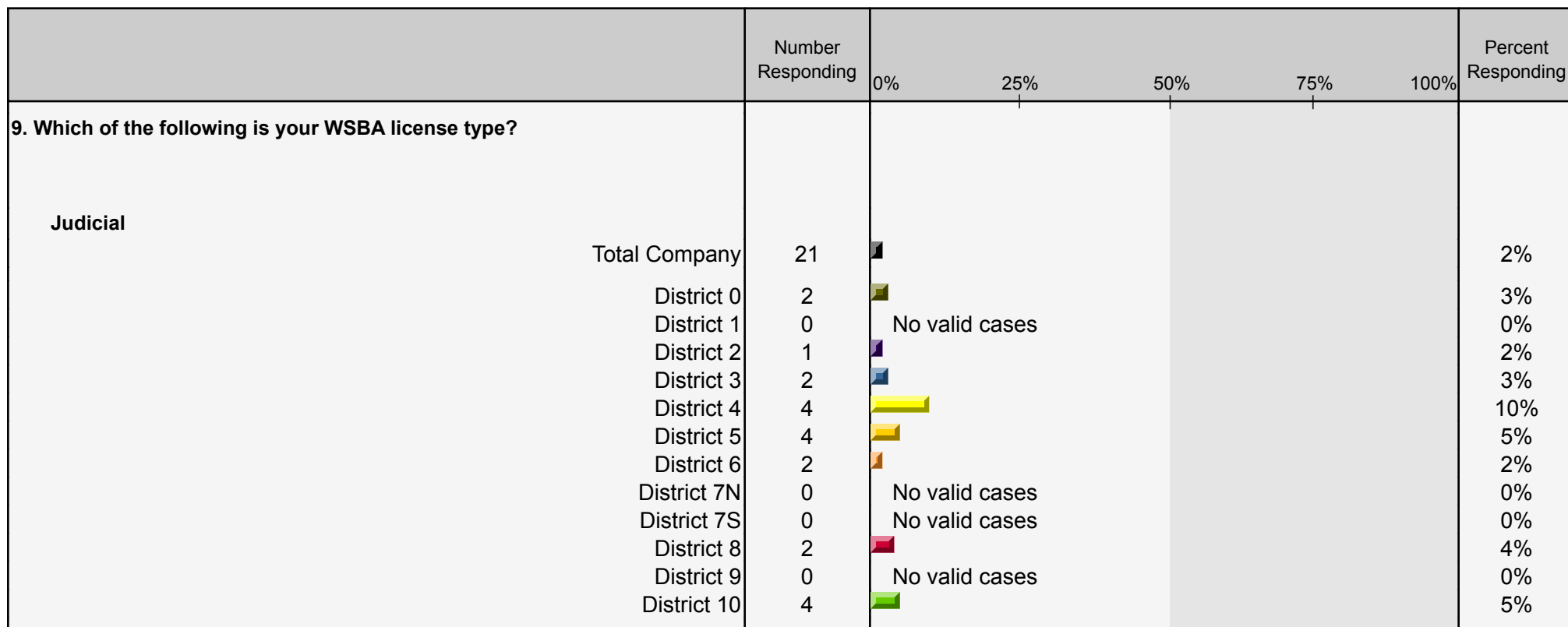
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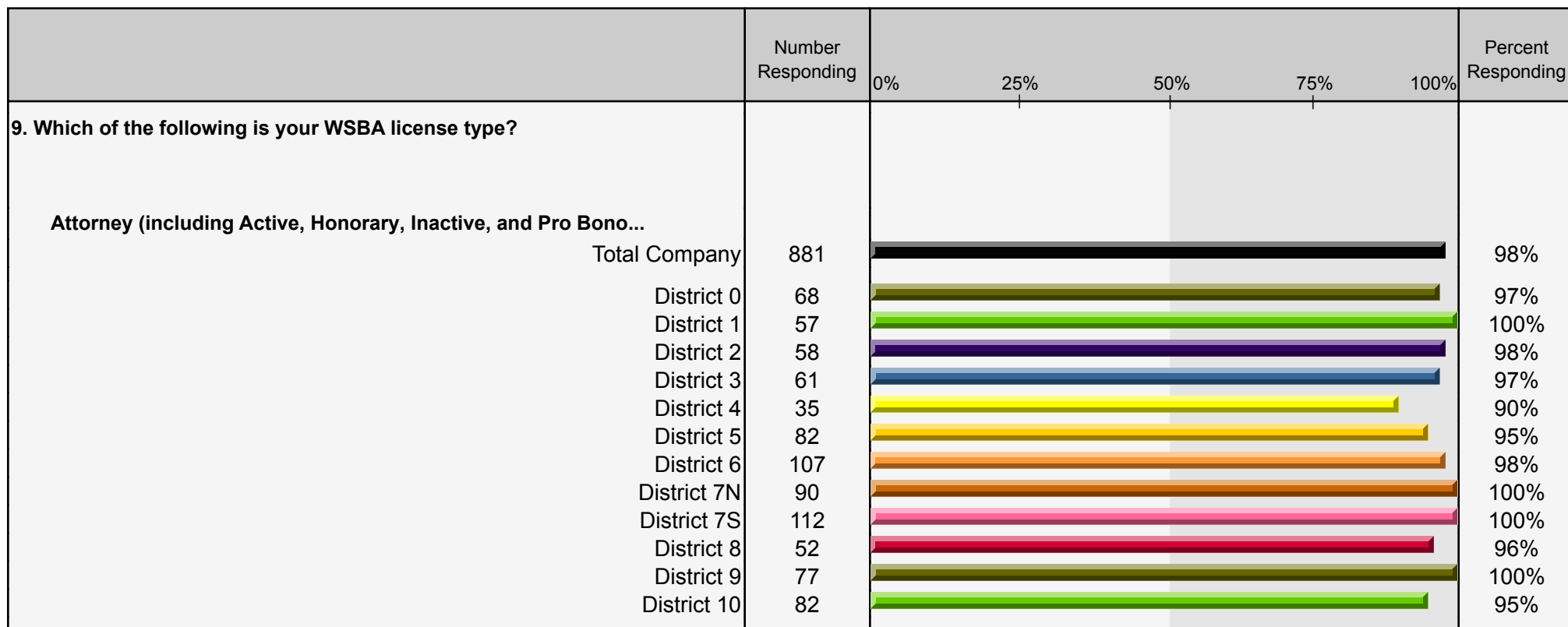
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Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



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Section III: Client Specific

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
9. Which of the following is your WSBA license type?							
Limited License Legal Technician (LLLT) (including Active, I...							
Total Company	0	No valid cases					0%
District 0	0	No valid cases					0%
District 1	0	No valid cases					0%
District 2	0	No valid cases					0%
District 3	0	No valid cases					0%
District 4	0	No valid cases					0%
District 5	0	No valid cases					0%
District 6	0	No valid cases					0%
District 7N	0	No valid cases					0%
District 7S	0	No valid cases					0%
District 8	0	No valid cases					0%
District 9	0	No valid cases					0%
District 10	0	No valid cases					0%



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Section III: Client Specific

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
9. Which of the following is your WSBA license type?							
<div>Limited Practice Officer (LPO) (including Active and Inactiv...</div>							
Total Company	0	No valid cases					0%
District 0	0	No valid cases					0%
District 1	0	No valid cases					0%
District 2	0	No valid cases					0%
District 3	0	No valid cases					0%
District 4	0	No valid cases					0%
District 5	0	No valid cases					0%
District 6	0	No valid cases					0%
District 7N	0	No valid cases					0%
District 7S	0	No valid cases					0%
District 8	0	No valid cases					0%
District 9	0	No valid cases					0%
District 10	0	No valid cases					0%

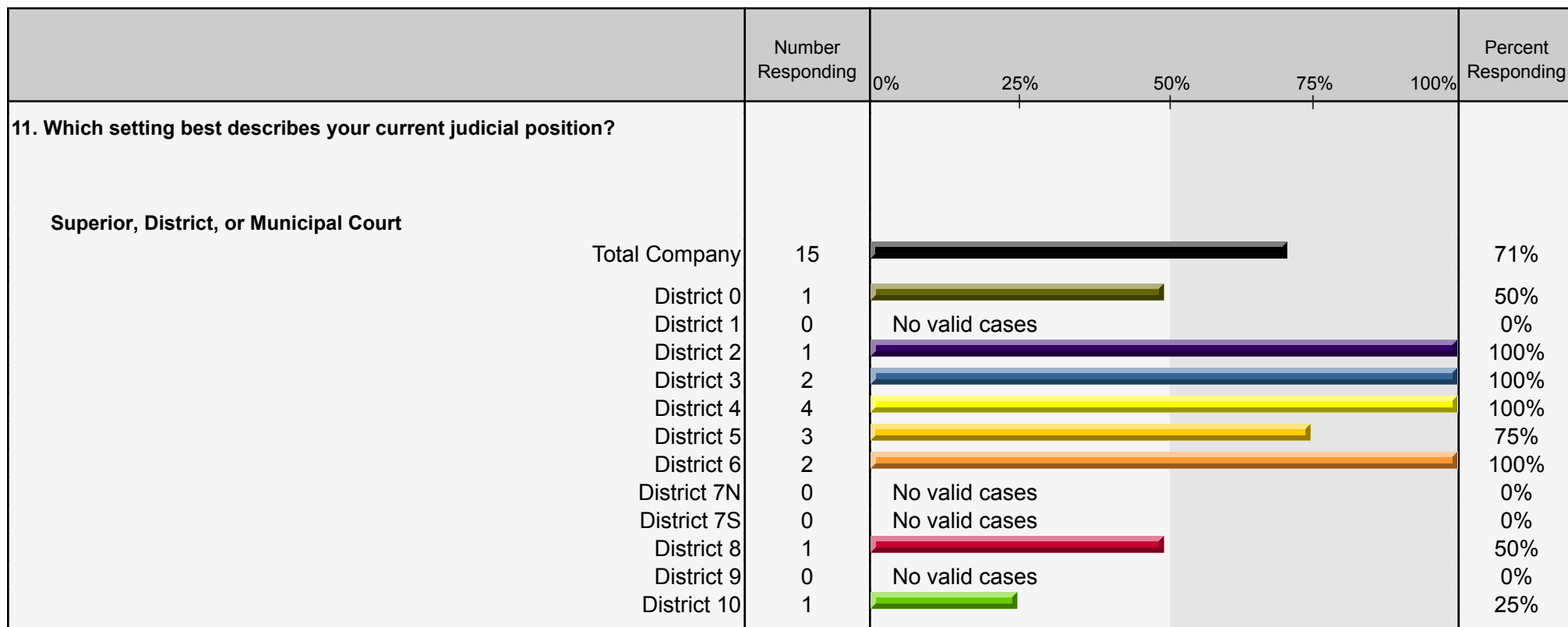
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
11. Which setting best describes your current judicial position?								
Appellate Court (any level)								
	Total Company	1						5%
	District 0	0	No valid cases					0%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	0	No valid cases					0%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	1						25%

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		Number Responding	0%	25%	50%	75%	100%	Percent Responding
11. Which setting best describes your current judicial position?								
Juvenile Court	Total Company	0	No valid cases					0%
	District 0	0	No valid cases					0%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	0	No valid cases					0%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%


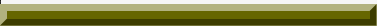
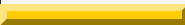

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Section III: Client Specific

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
11. Which setting best describes your current judicial position?								
Tribal Court	Total Company	0	No valid cases					0%
	District 0	0	No valid cases					0%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	0	No valid cases					0%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%

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		Number Responding	0%25%50%75%100%	Percent Responding
11. Which setting best describes your current judicial position?				
Administrative Law Judge				
	Total Company	4		19%
	District 0	1		50%
	District 1	0	No valid cases	0%
	District 2	0	No valid cases	0%
	District 3	0	No valid cases	0%
	District 4	0	No valid cases	0%
	District 5	1		25%
	District 6	0	No valid cases	0%
	District 7N	0	No valid cases	0%
	District 7S	0	No valid cases	0%
	District 8	0	No valid cases	0%
	District 9	0	No valid cases	0%
	District 10	2		50%



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		Number Responding	0%	25%	50%	75%	100%	Percent Responding
11. Which setting best describes your current judicial position?								
Magistrate Judge	Total Company	0	No valid cases					0%
	District 0	0	No valid cases					0%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	0	No valid cases					0%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%

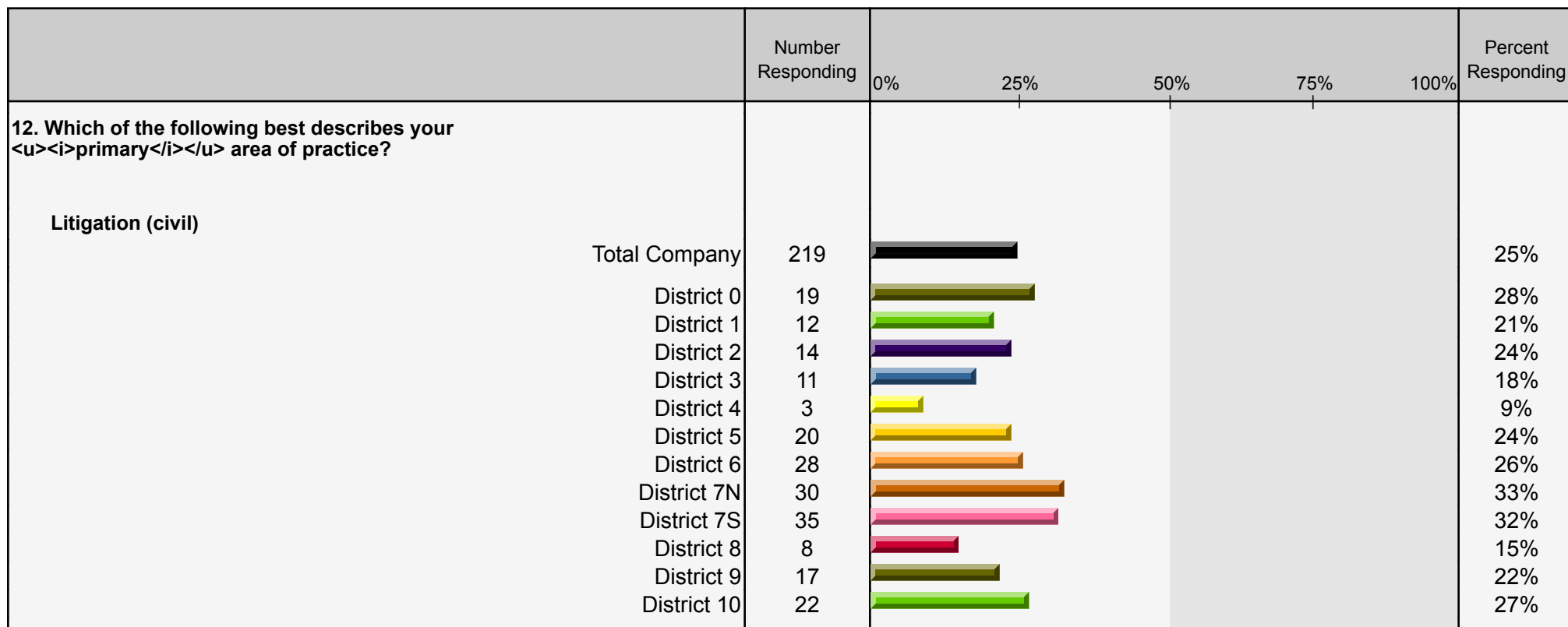
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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	Number Responding	0%25%50%75%100%	Percent Responding
11. Which setting best describes your current judicial position?			
Other, please specify:			
Total Company	1		5%
District 0	0	No valid cases	0%
District 1	0	No valid cases	0%
District 2	0	No valid cases	0%
District 3	0	No valid cases	0%
District 4	0	No valid cases	0%
District 5	0	No valid cases	0%
District 6	0	No valid cases	0%
District 7N	0	No valid cases	0%
District 7S	0	No valid cases	0%
District 8	1		50%
District 9	0	No valid cases	0%
District 10	0	No valid cases	0%

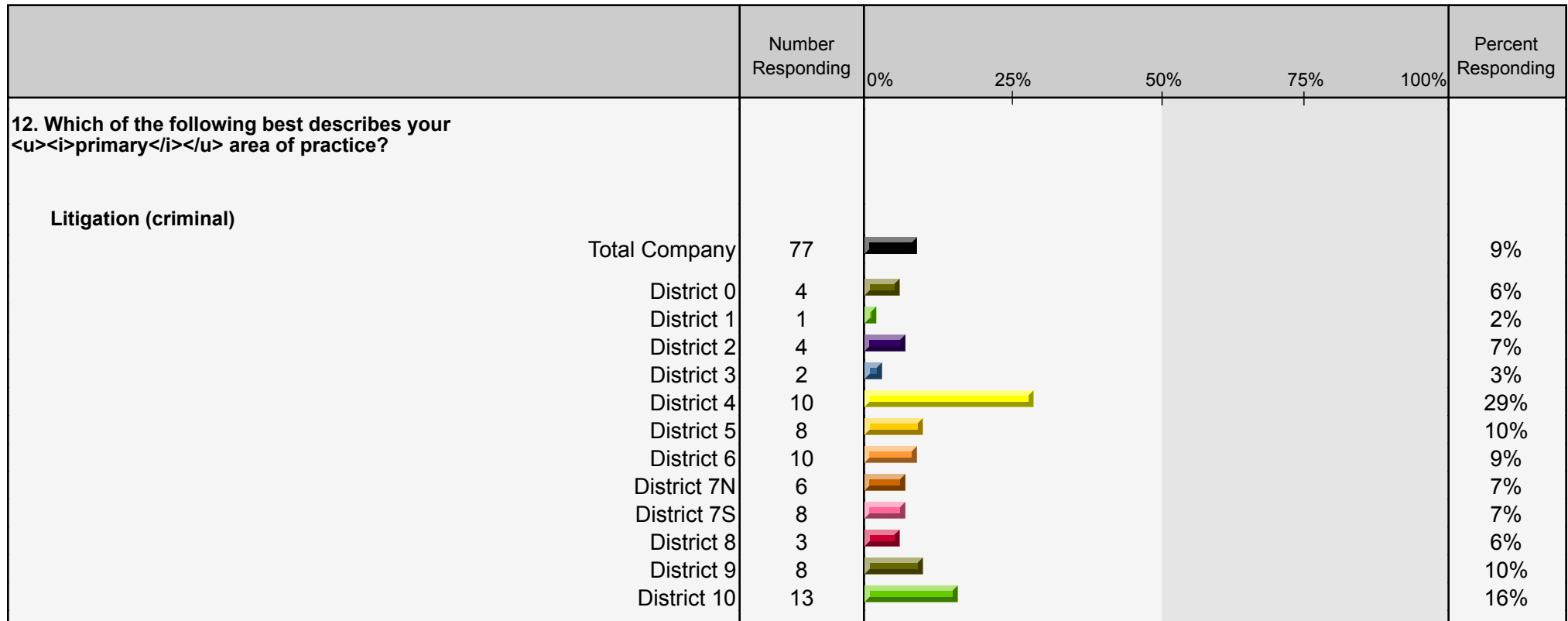
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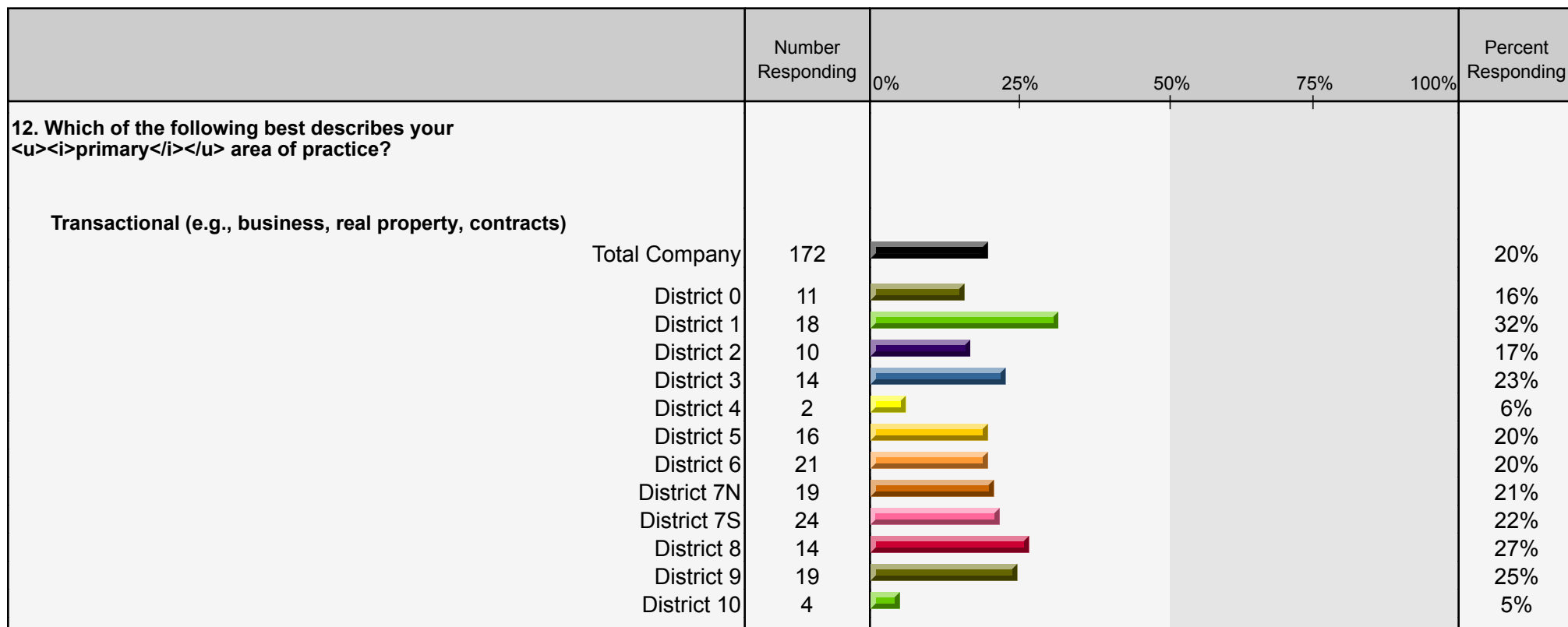
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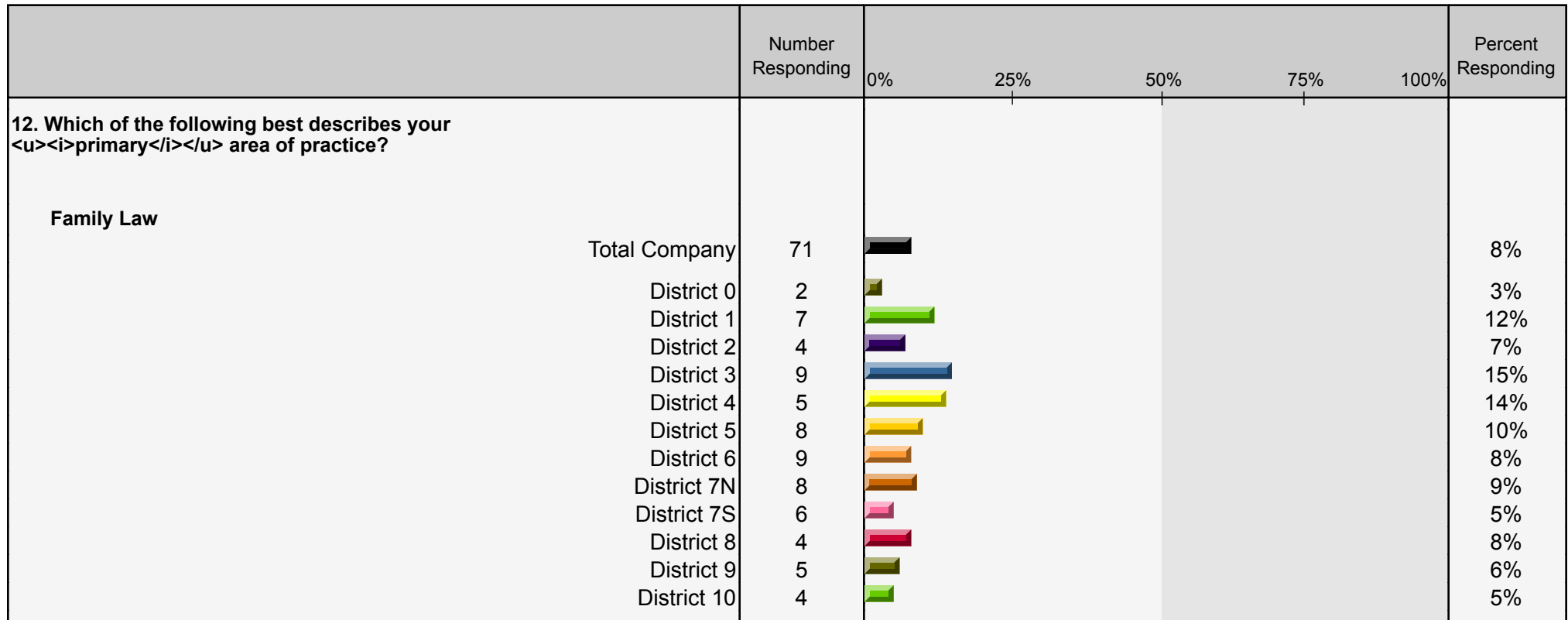
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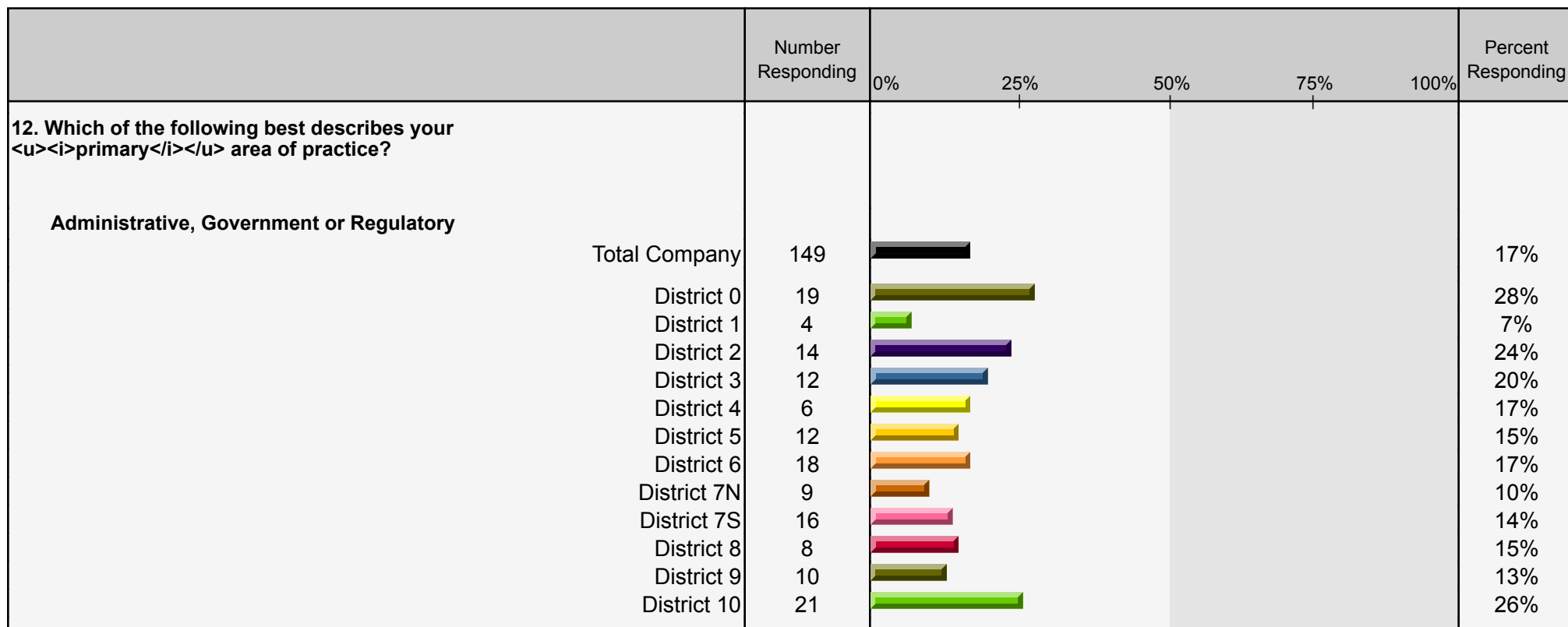
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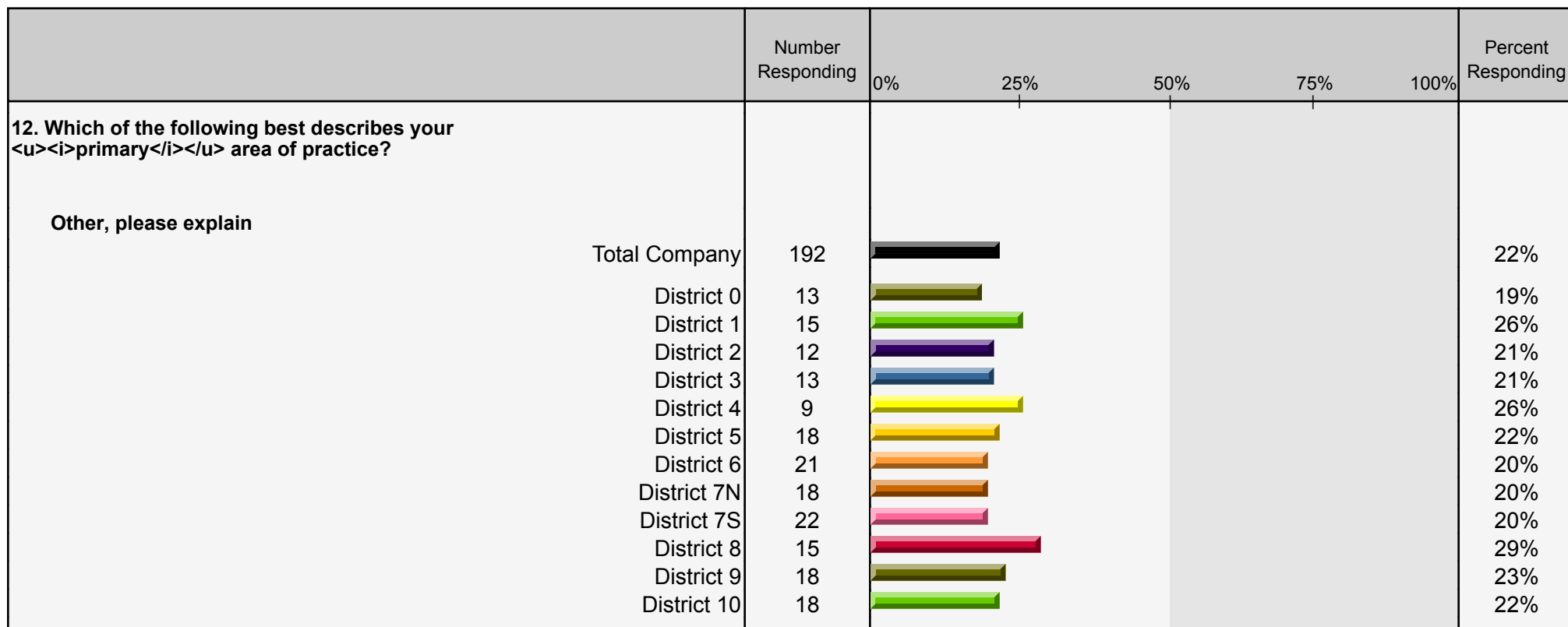
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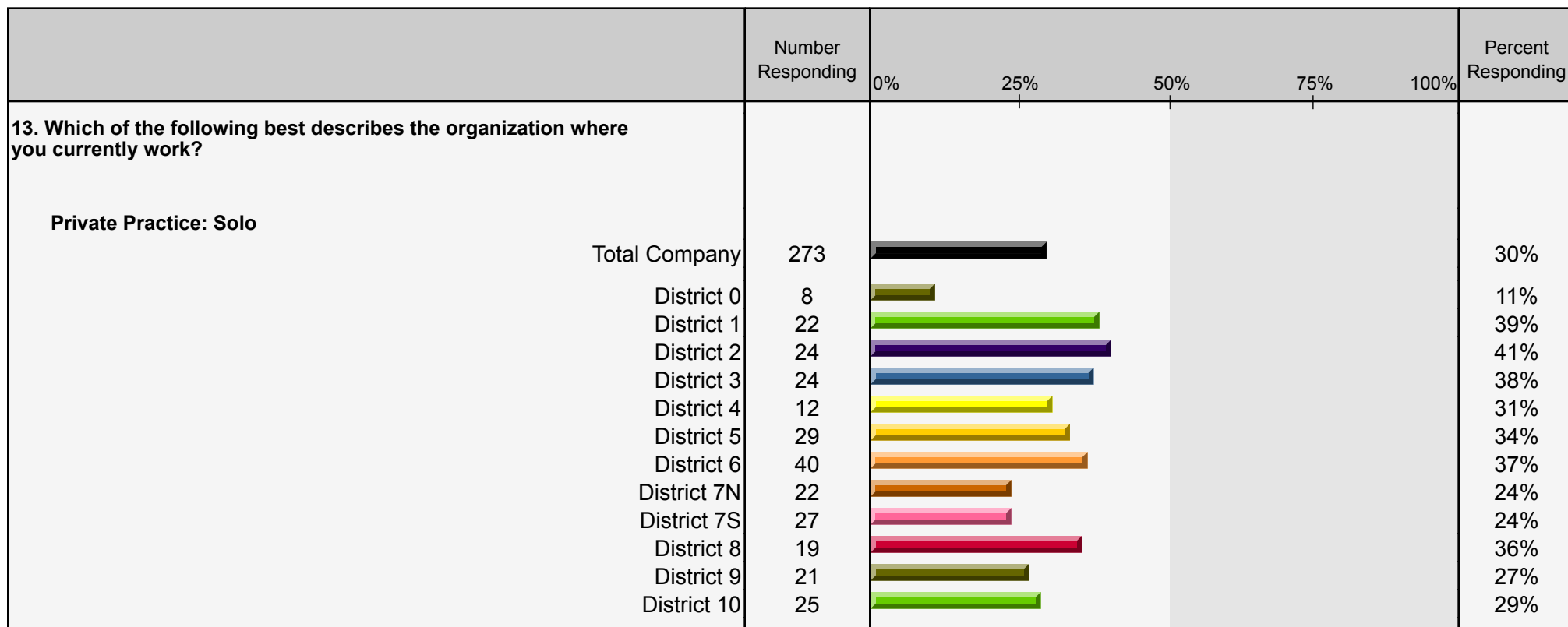
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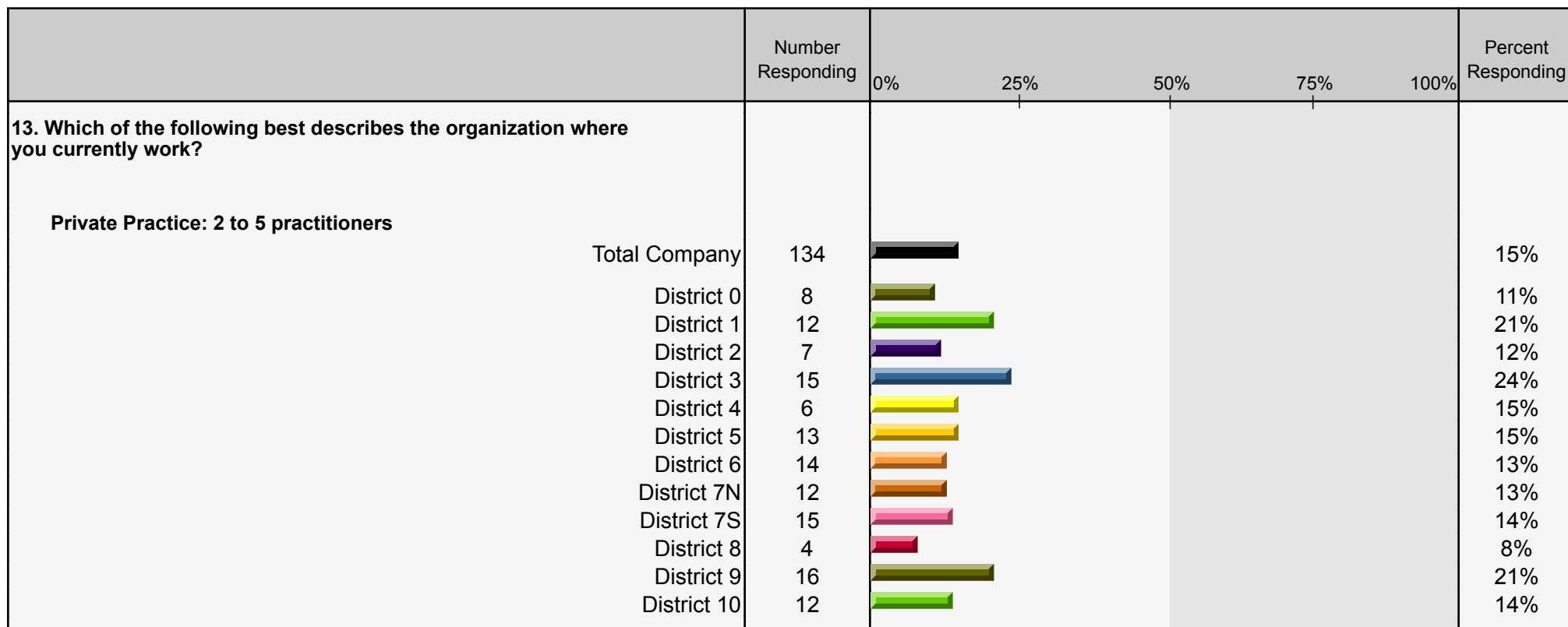
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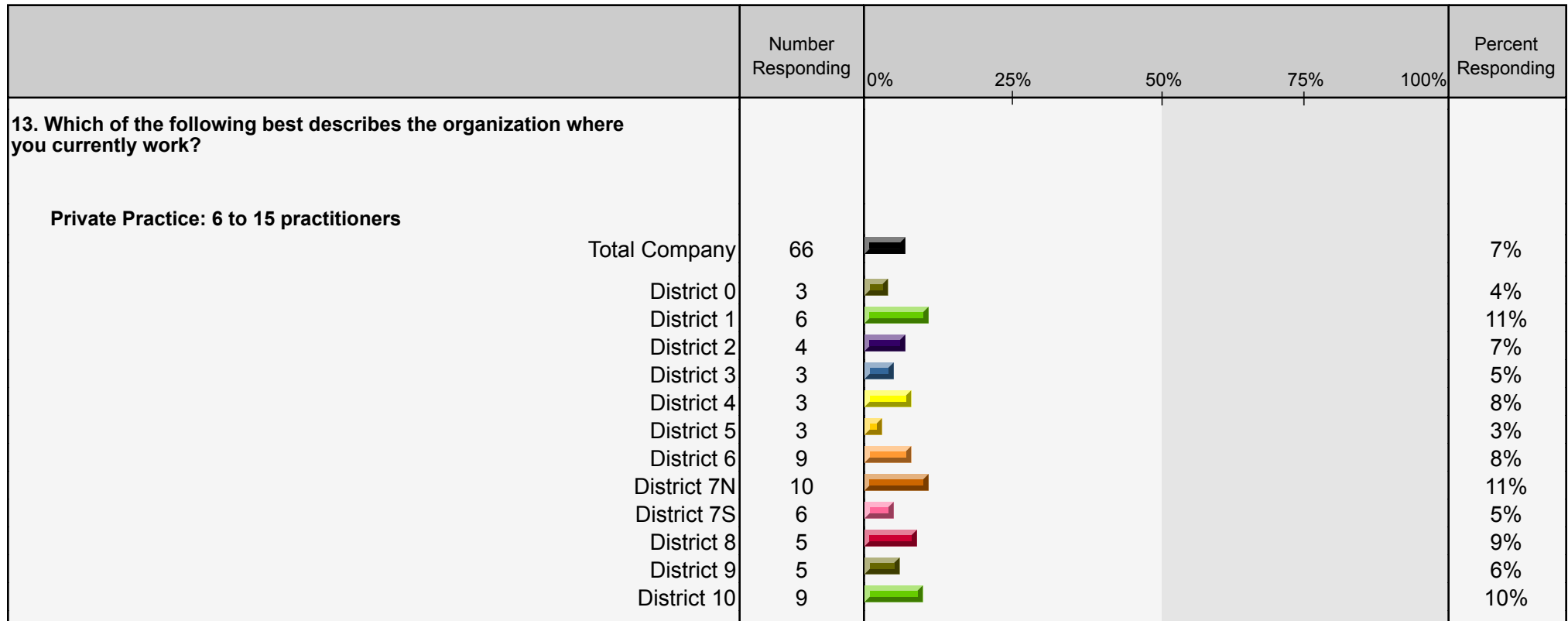
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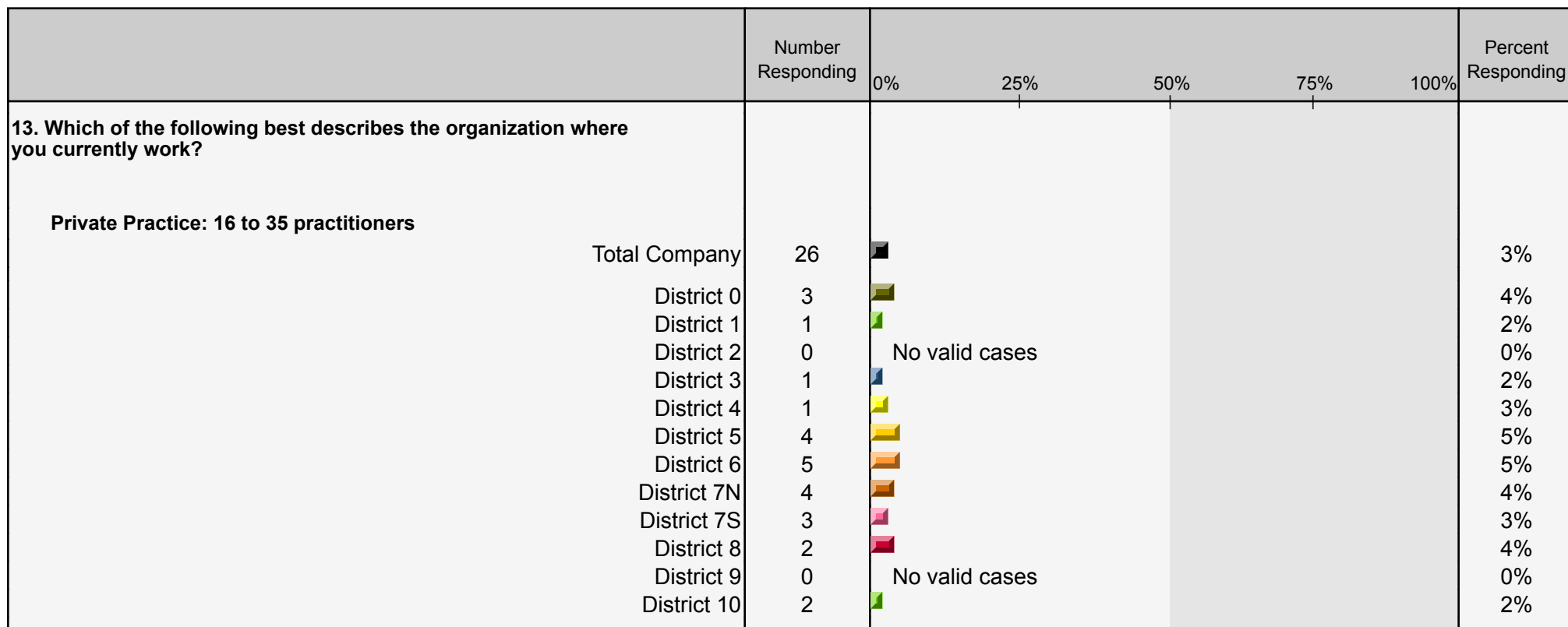
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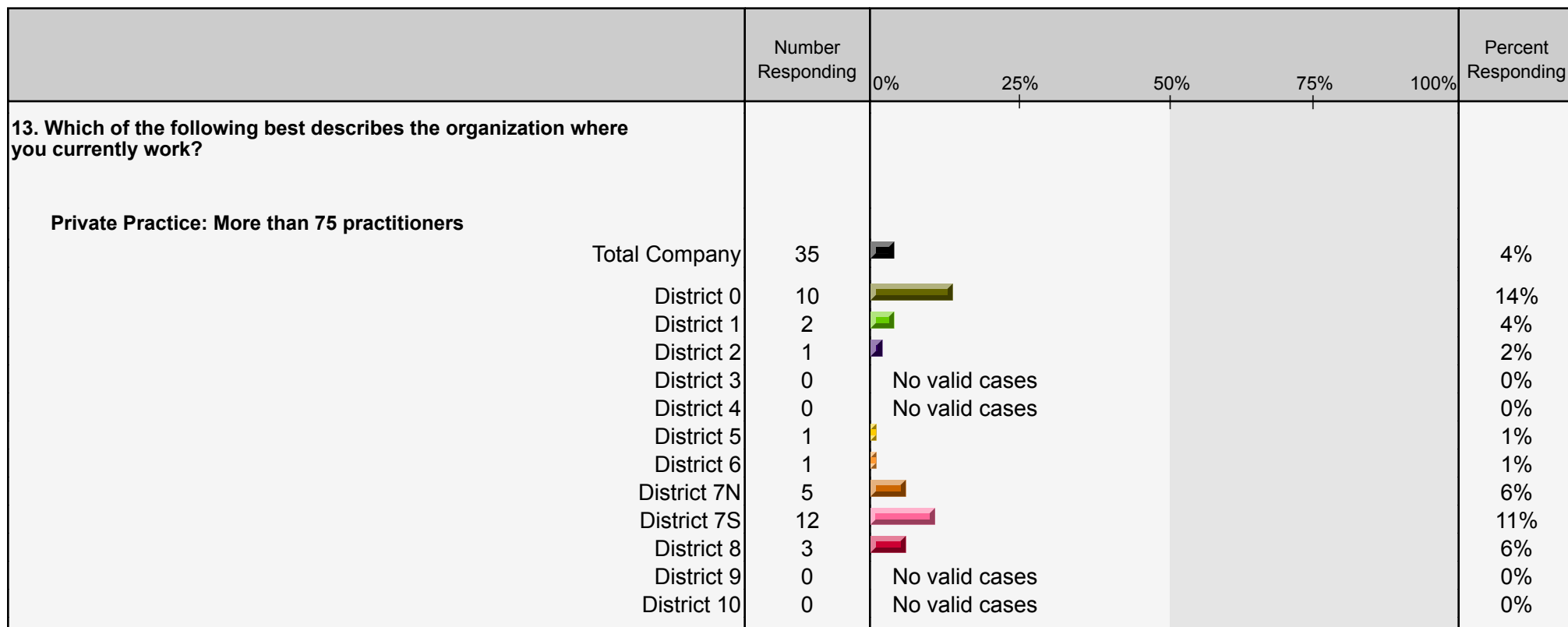
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Section III: Client Specific

		Number Responding	0%25%50%75%100%	Percent Responding
13. Which of the following best describes the organization where you currently work?				
Private Practice: 36 to 75 practitioners				
	Total Company	7		1%
	District 0	0	No valid cases	0%
	District 1	1		2%
	District 2	0	No valid cases	0%
	District 3	0	No valid cases	0%
	District 4	0	No valid cases	0%
	District 5	3		3%
	District 6	0	No valid cases	0%
	District 7N	2		2%
	District 7S	1		1%
	District 8	0	No valid cases	0%
	District 9	0	No valid cases	0%
	District 10	0	No valid cases	0%









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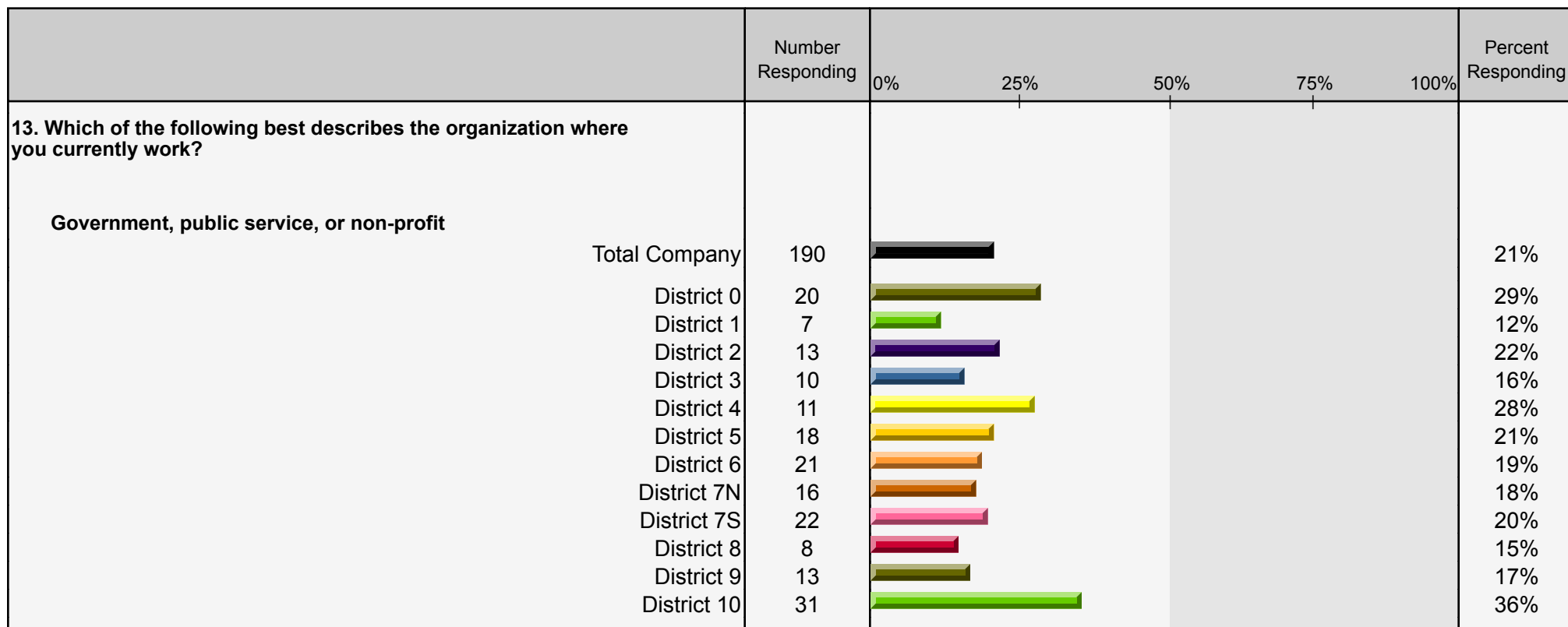
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		Number Responding	0%25%50%75%100%	Percent Responding
13. Which of the following best describes the organization where you currently work?				
Judicial Chambers (e.g., hearing officer, law clerk)				
	Total Company	15		2%
	District 0	2		3%
	District 1	0	No valid cases	0%
	District 2	2		3%
	District 3	0	No valid cases	0%
	District 4	3		8%
	District 5	2		2%
	District 6	3		3%
	District 7N	0	No valid cases	0%
	District 7S	0	No valid cases	0%
	District 8	1		2%
	District 9	0	No valid cases	0%
	District 10	2		2%

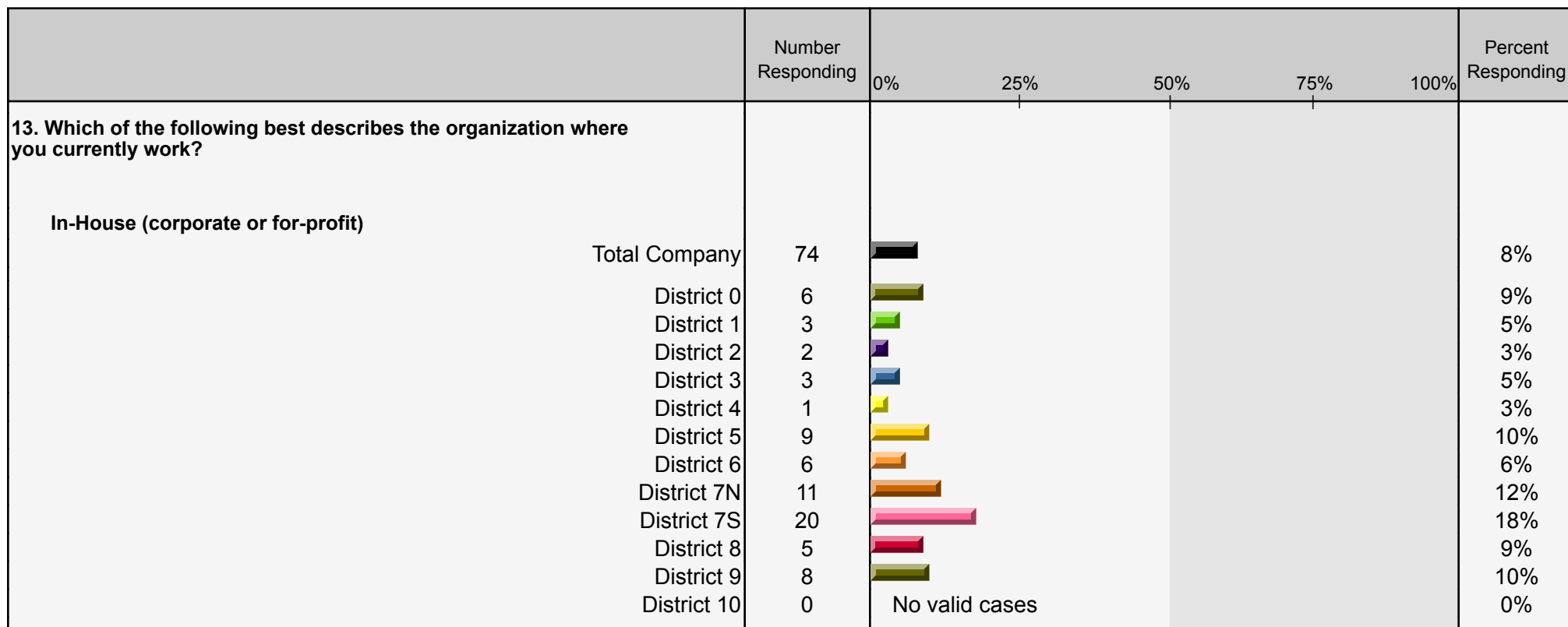
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		Number Responding	0%	25%	50%	75%	100%	Percent Responding
13. Which of the following best describes the organization where you currently work?								
Law School (professor or administration)								
	Total Company	5						1%
	District 0	1						1%
	District 1	1						2%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	1						1%
	District 7N	1						1%
	District 7S	0	No valid cases					0%
	District 8	1						2%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%

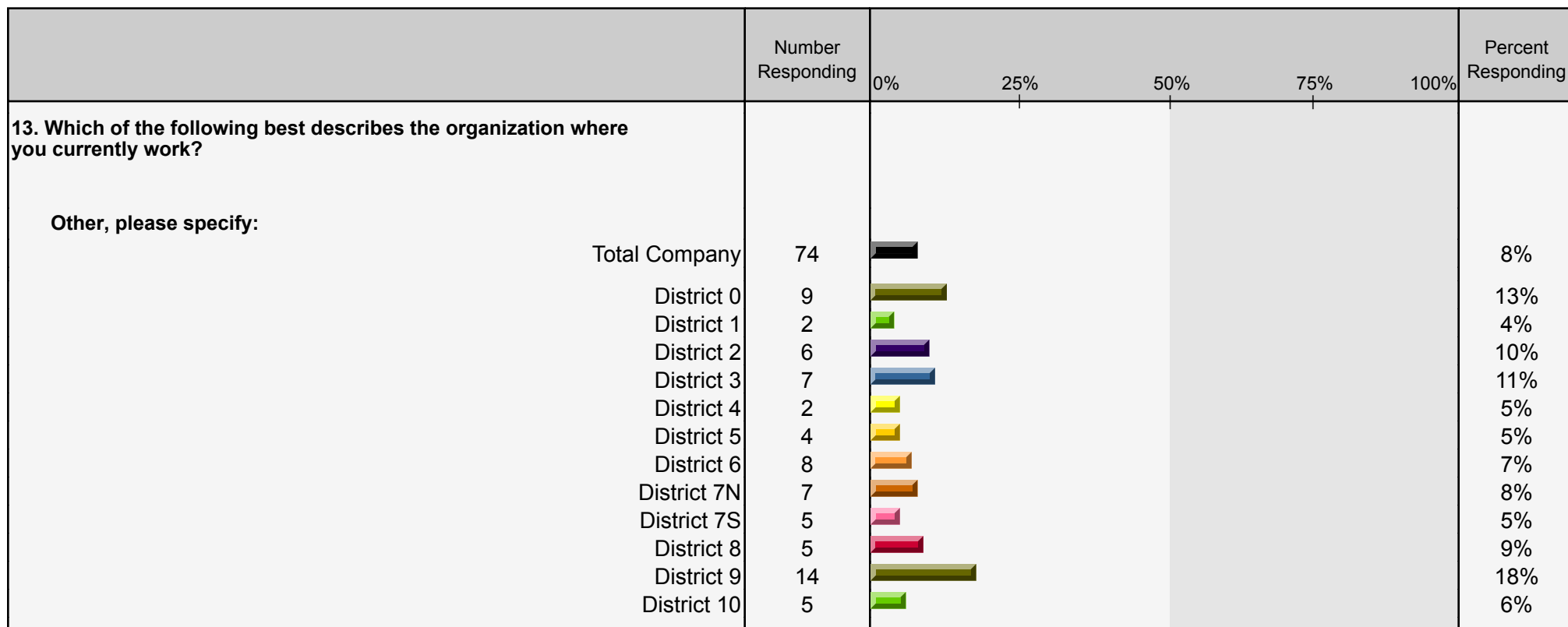
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		Number Responding	0%	25%	50%	75%	100%	Percent Responding
13. Which of the following best describes the organization where you currently work?								
Bar administration or lawyer assistance								
	Total Company	1						0%
	District 0	0	No valid cases					0%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	1						1%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%

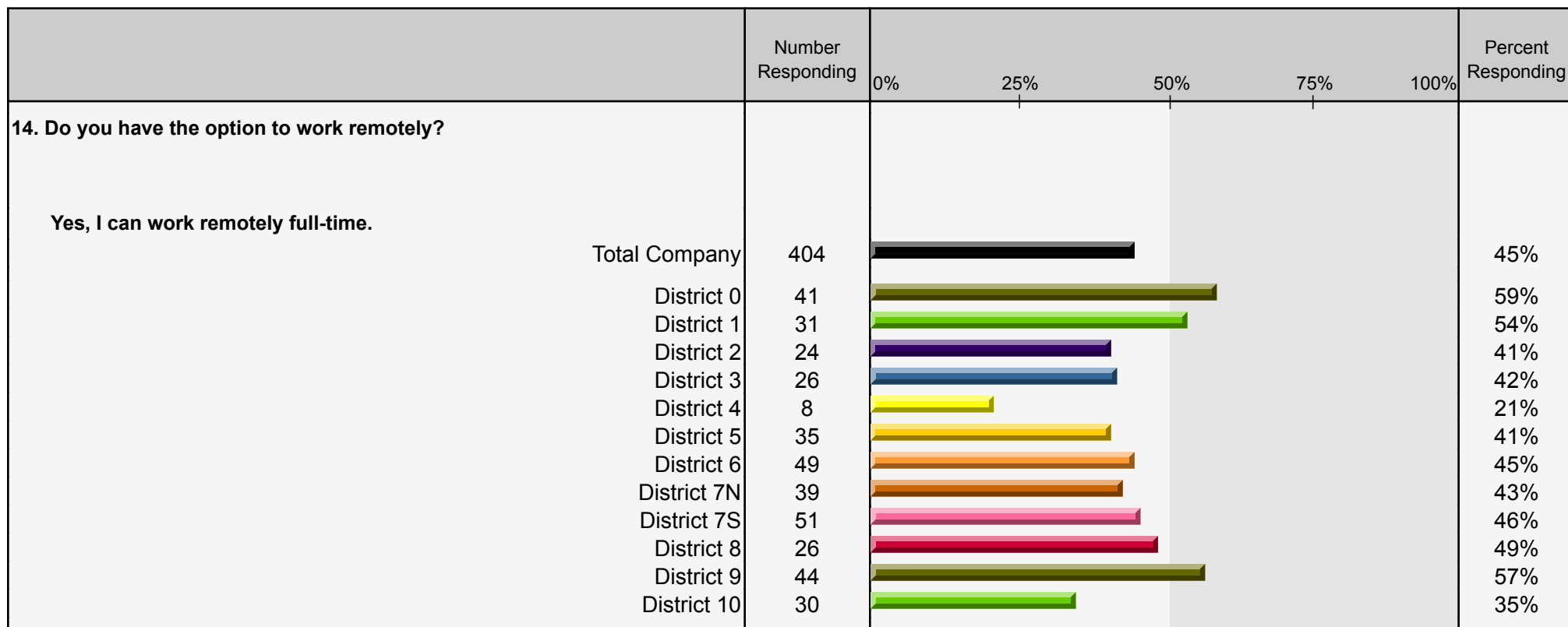
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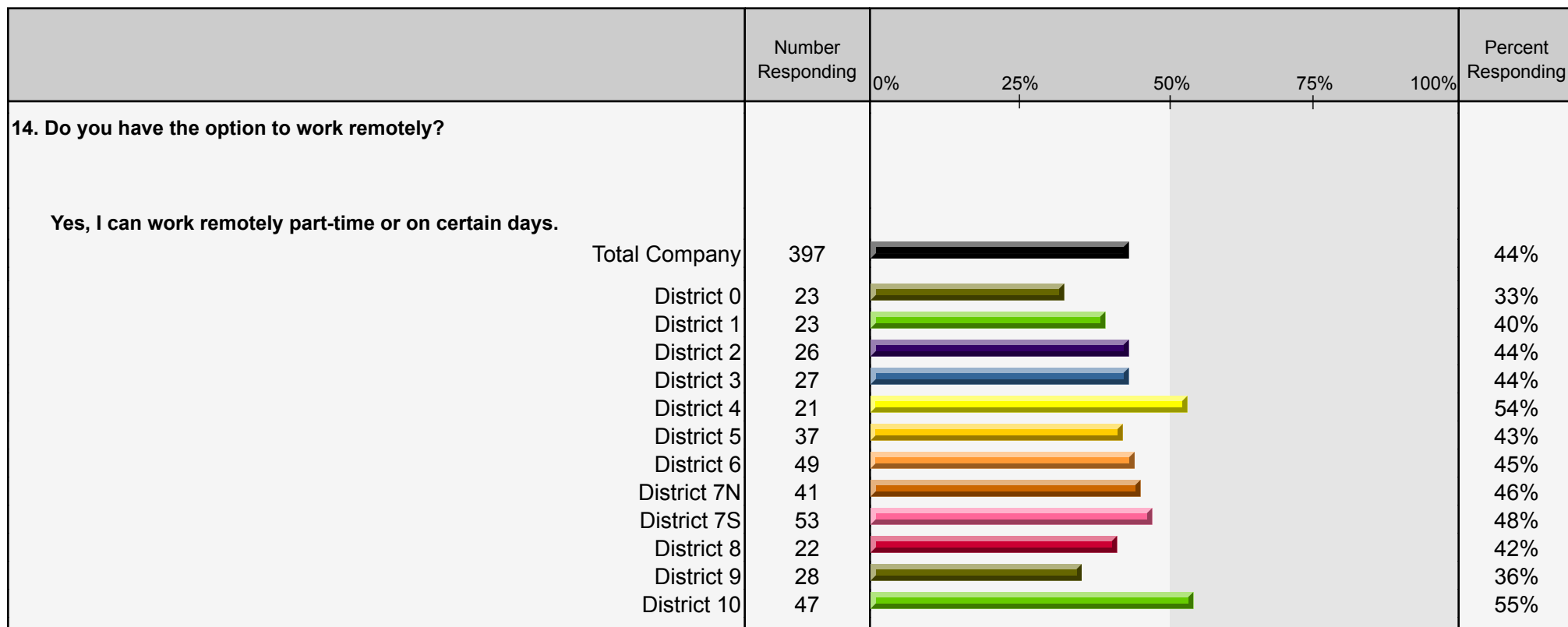
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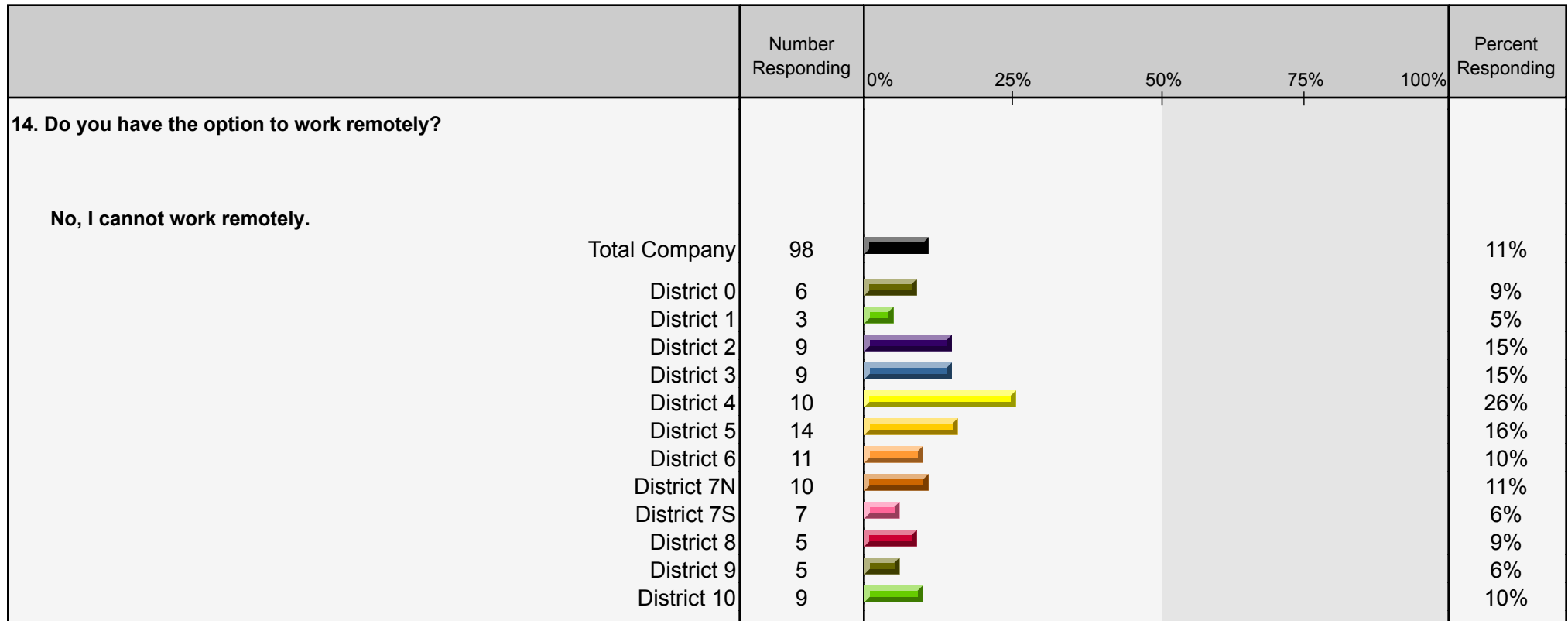
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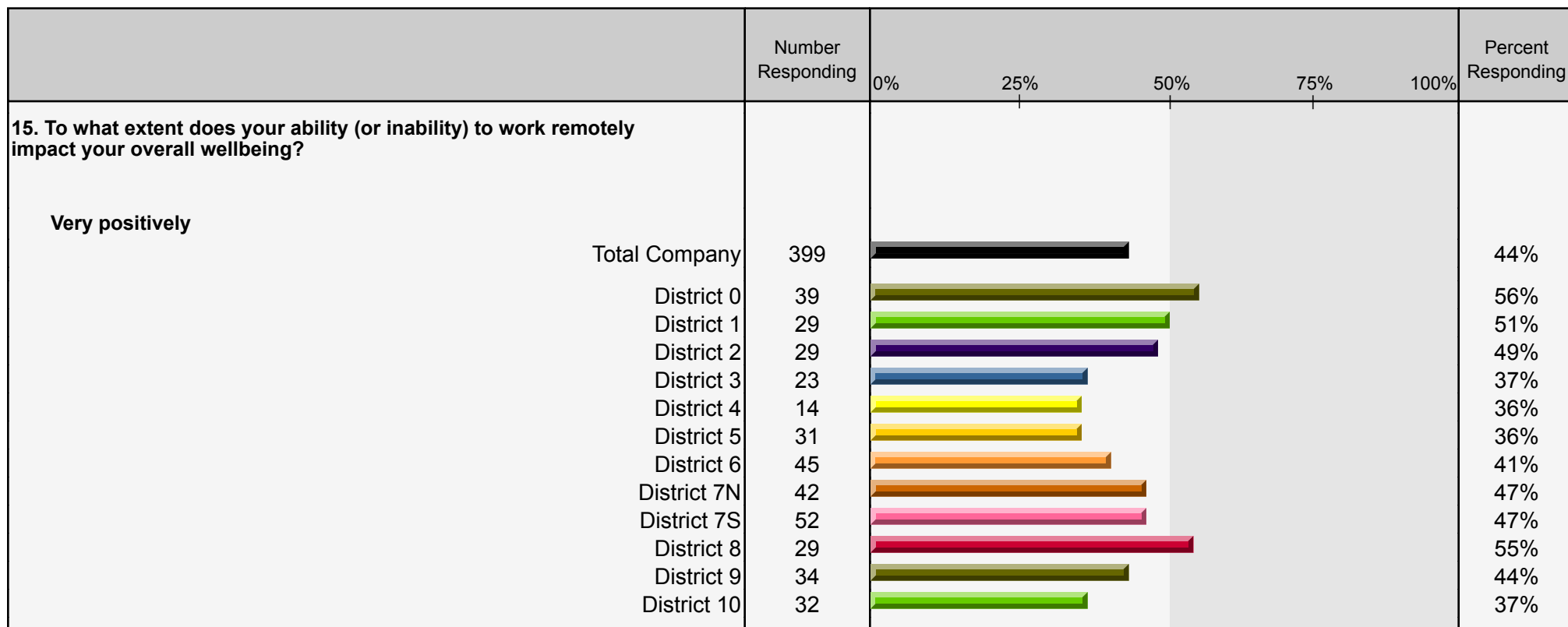
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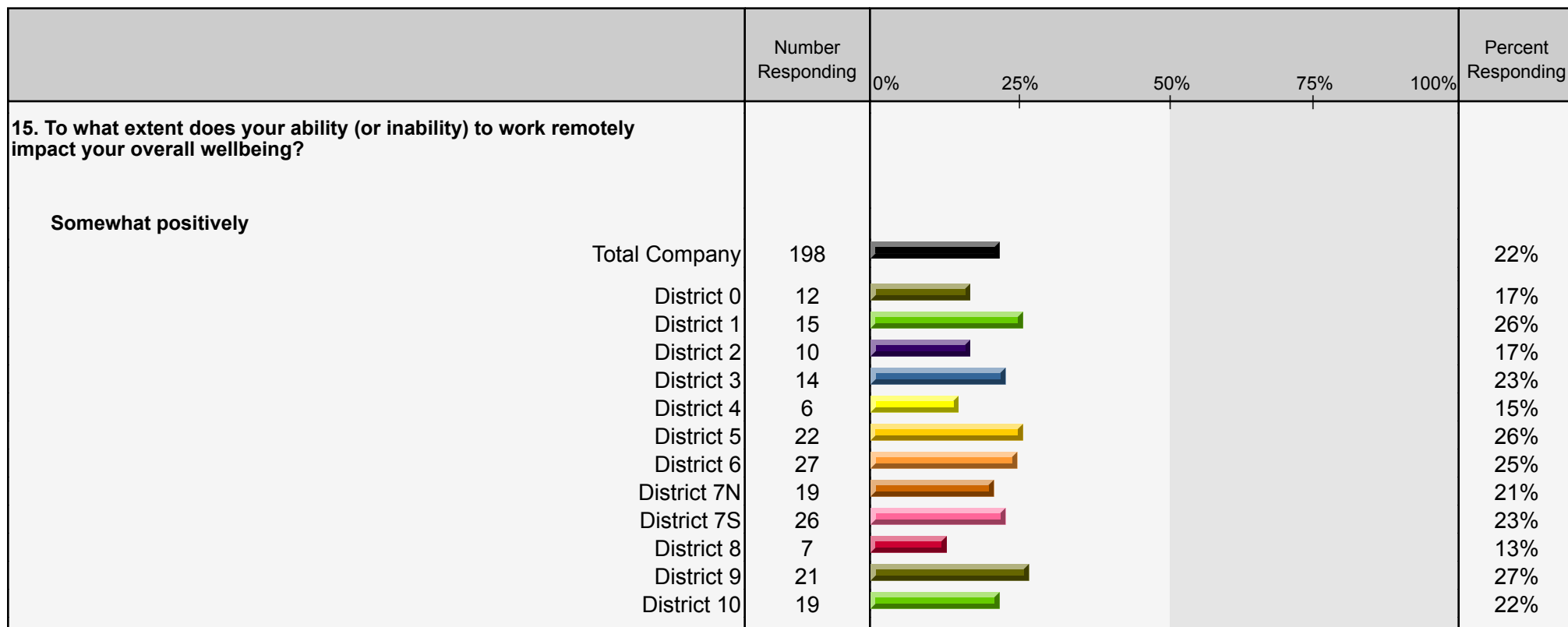
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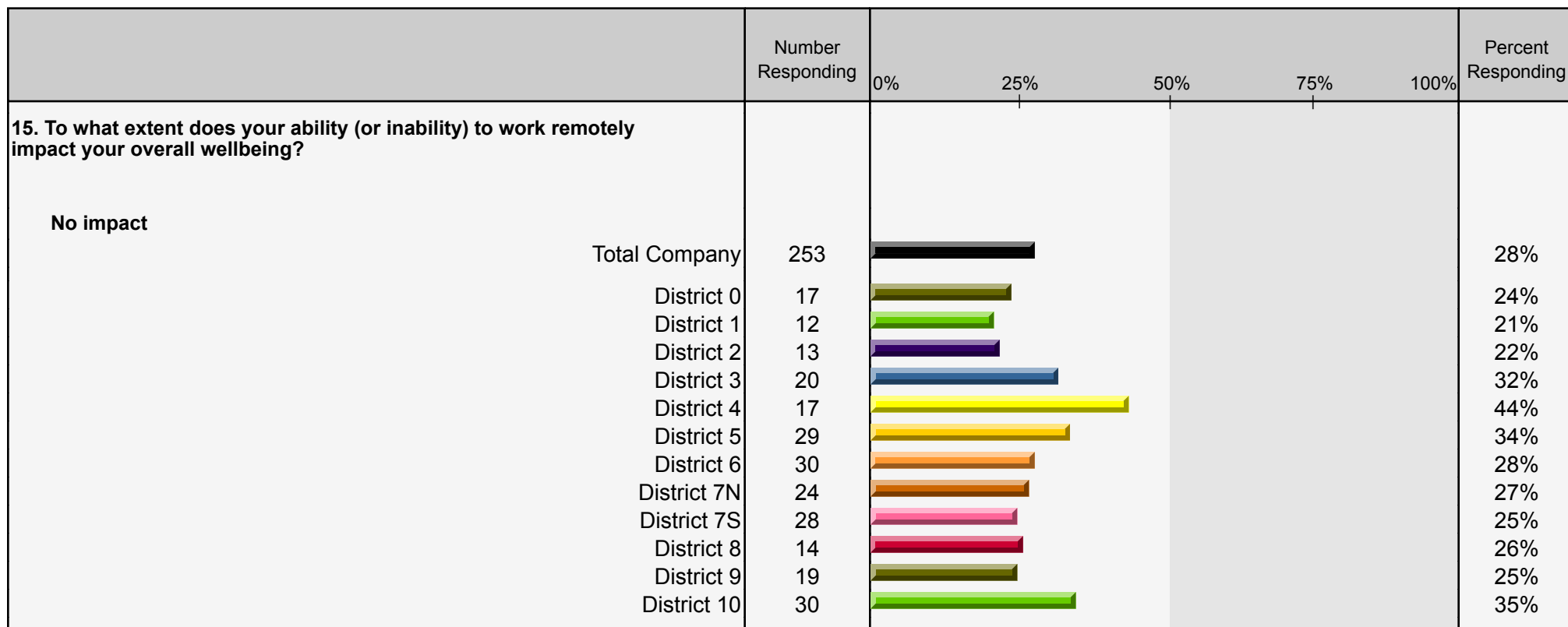
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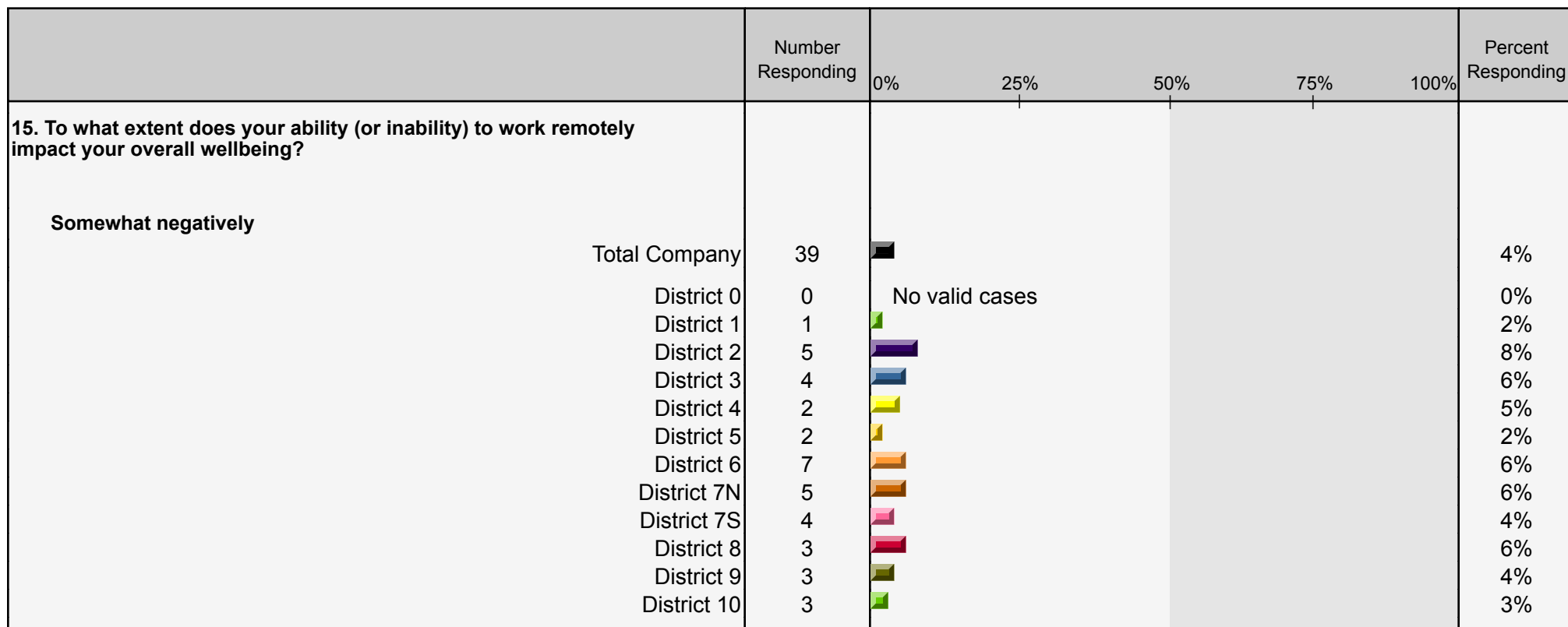
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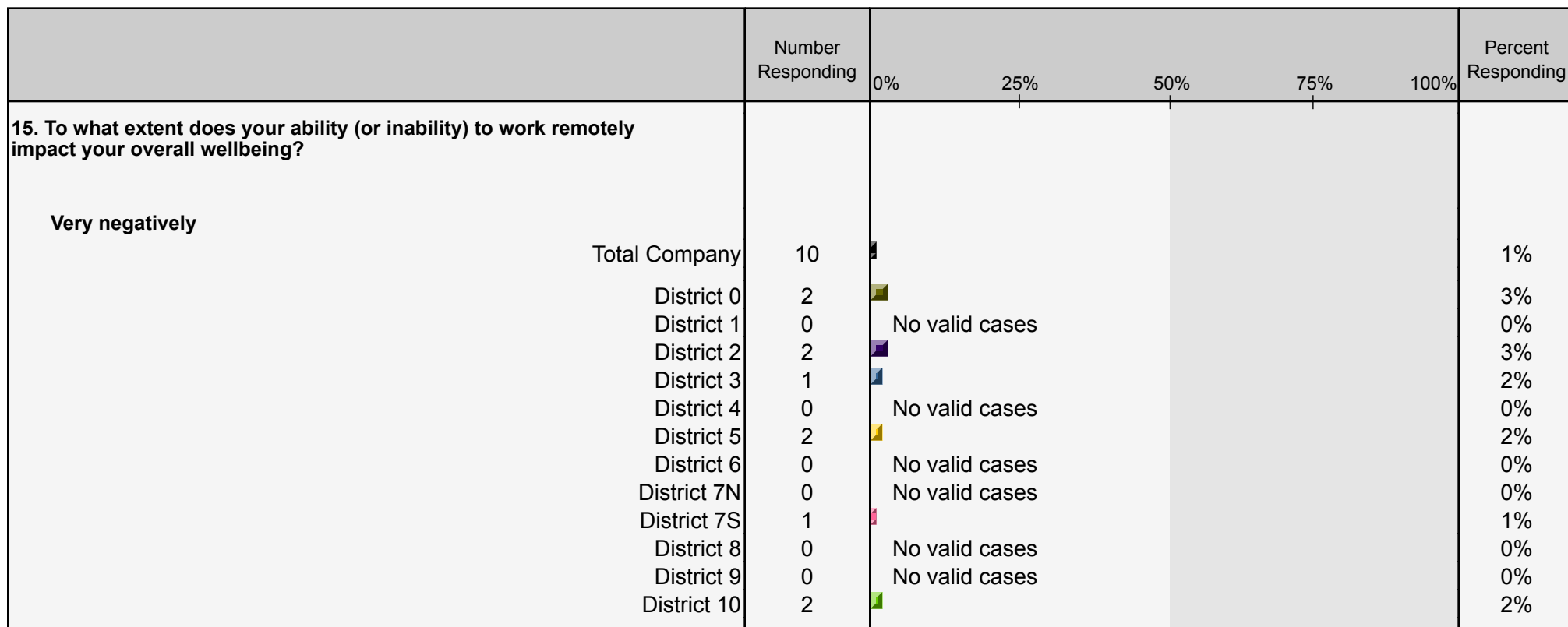
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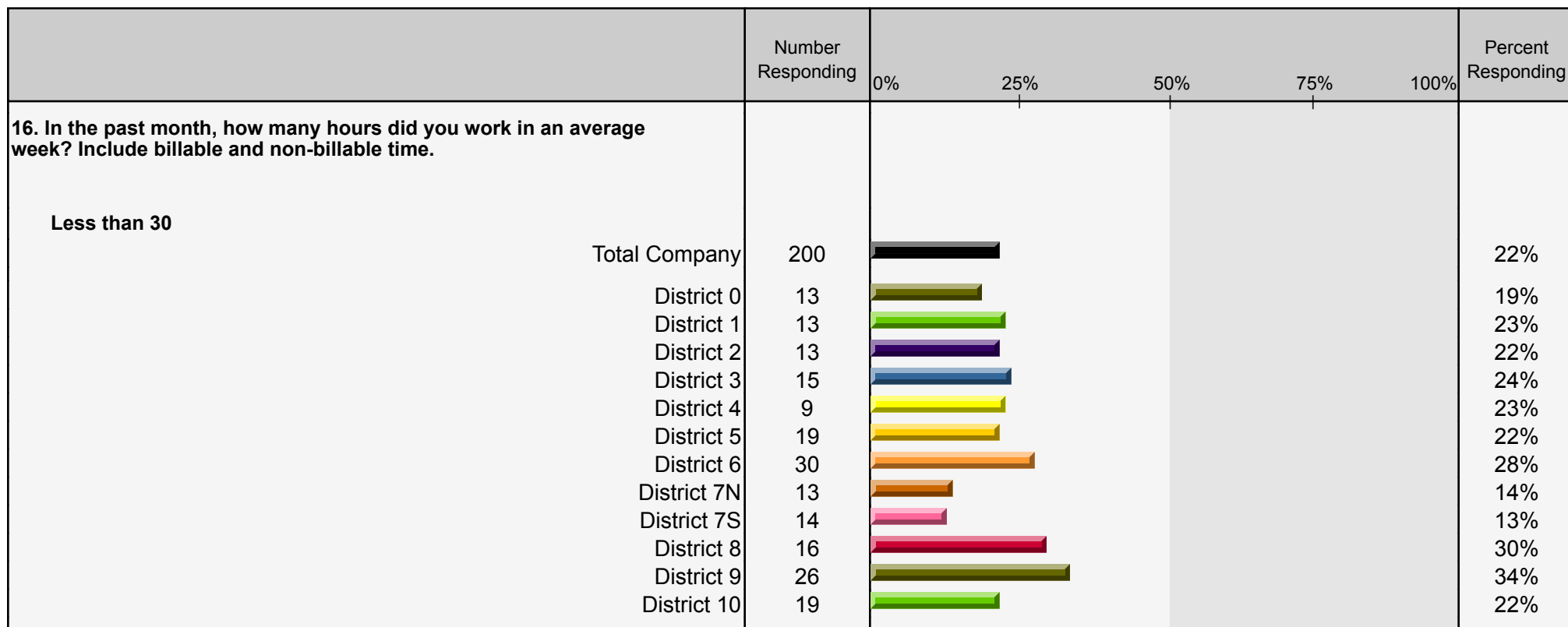
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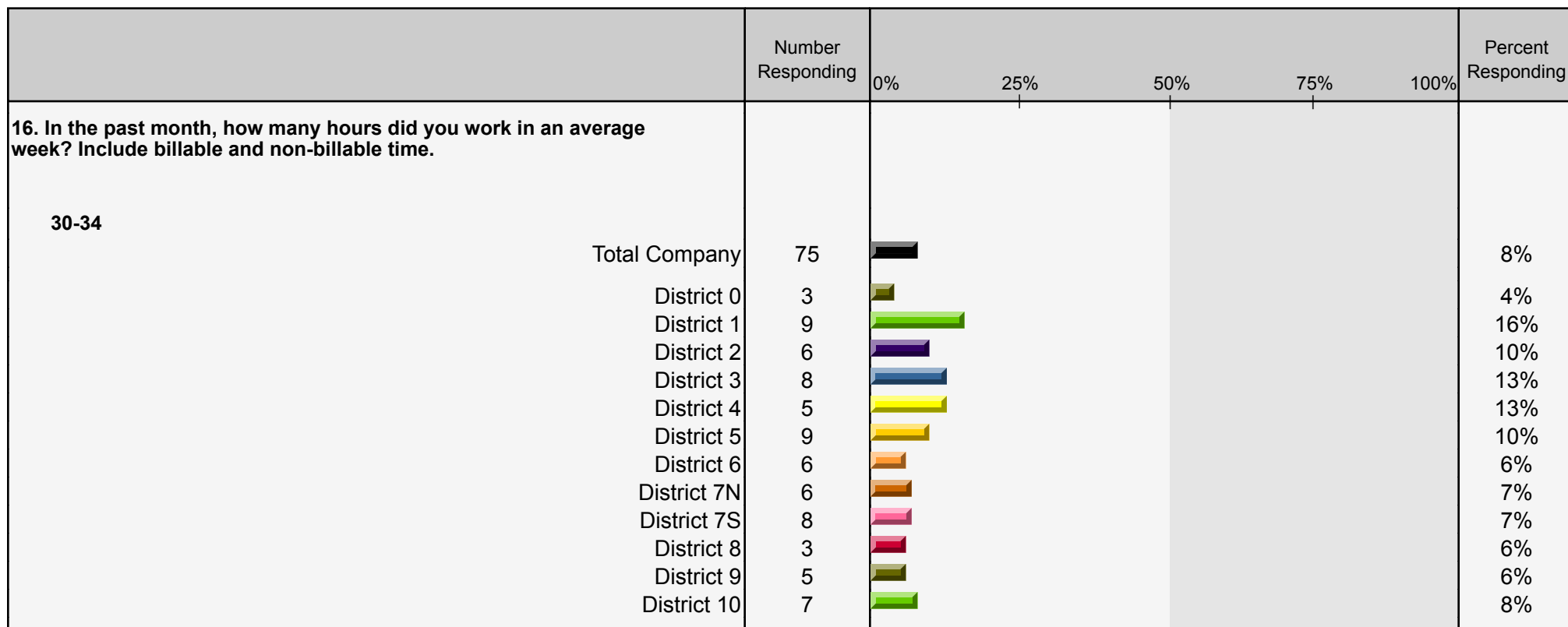
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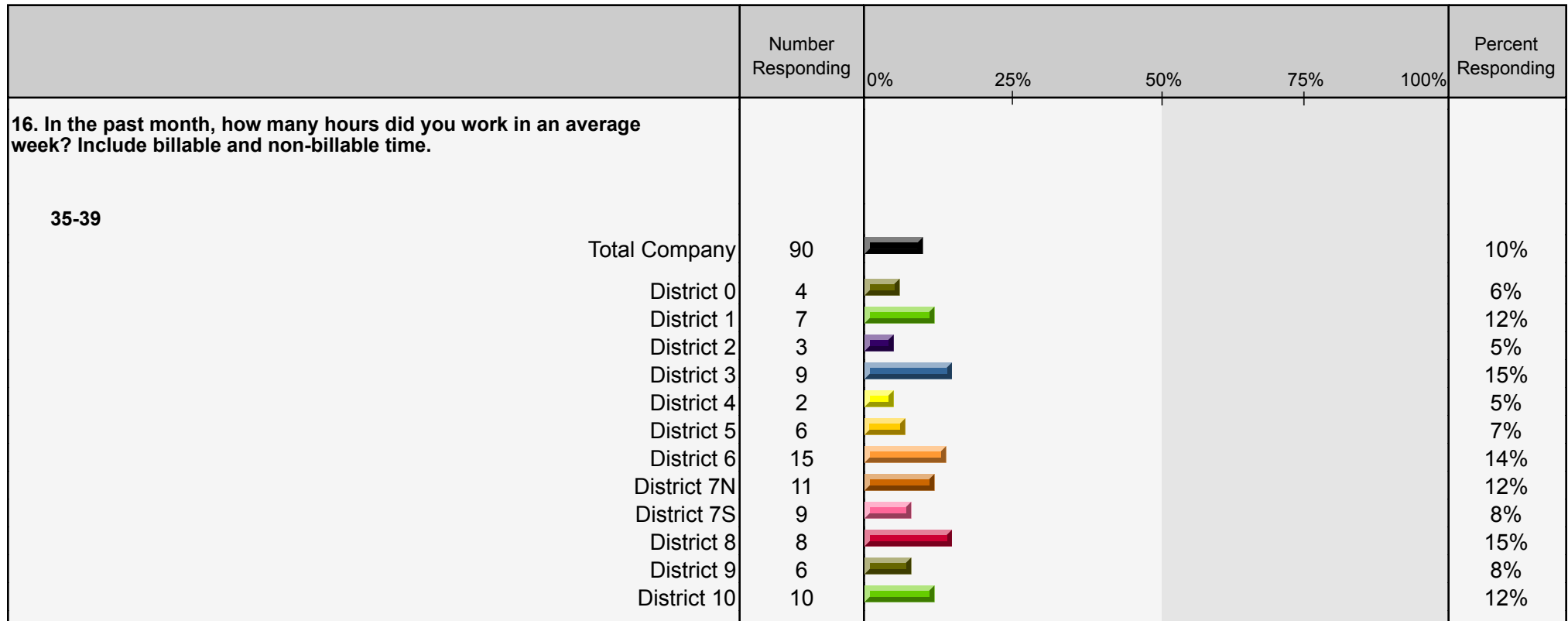
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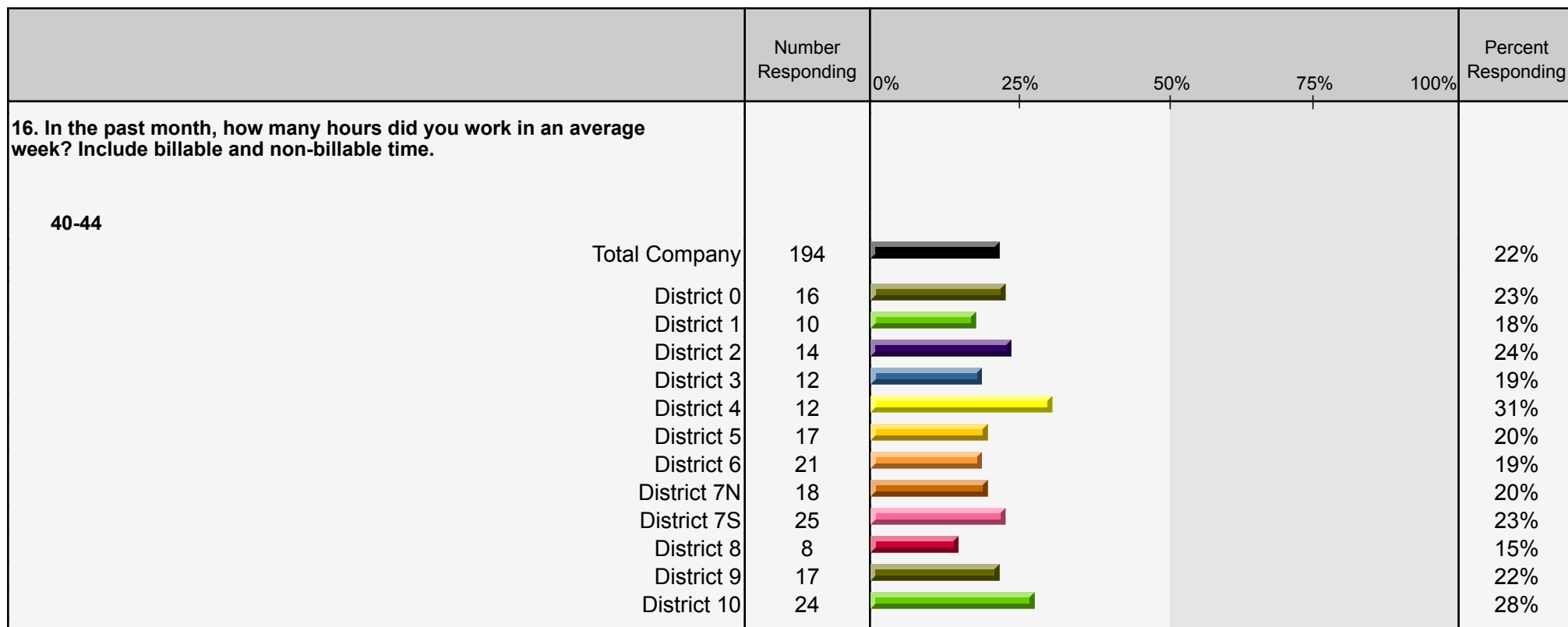
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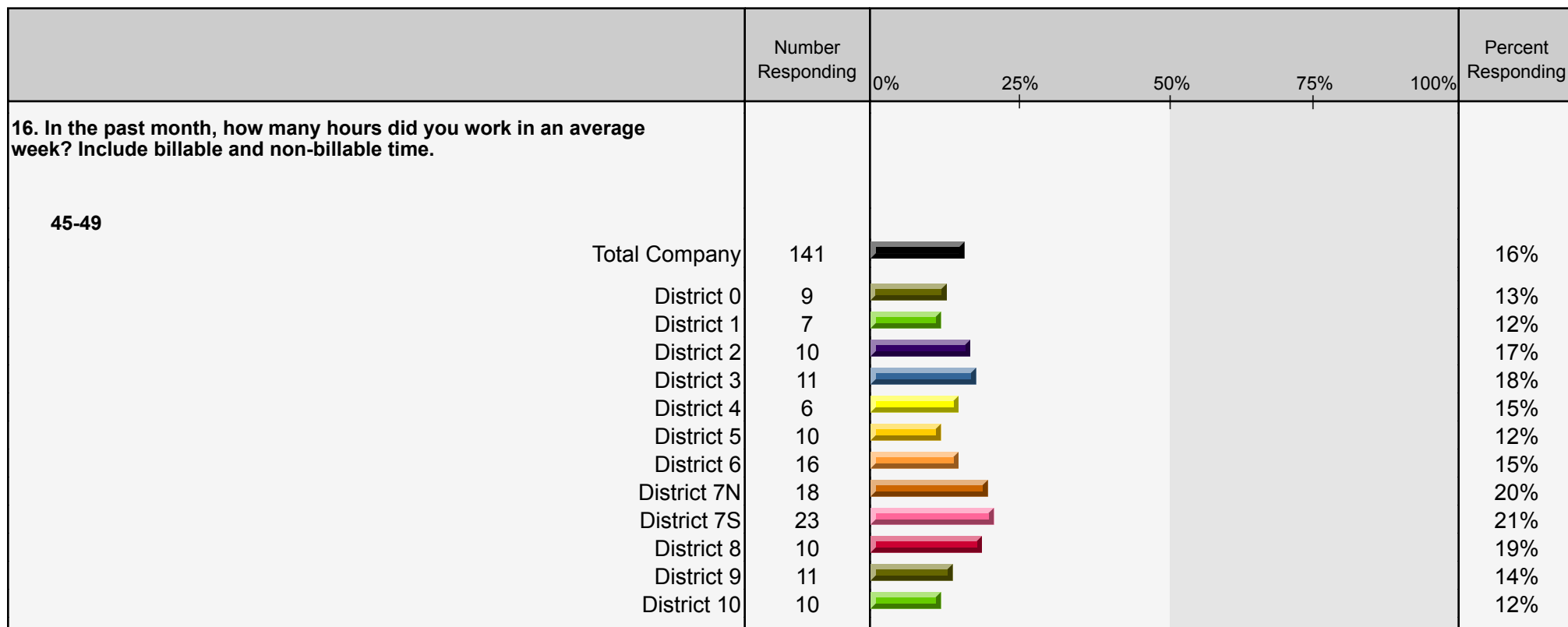
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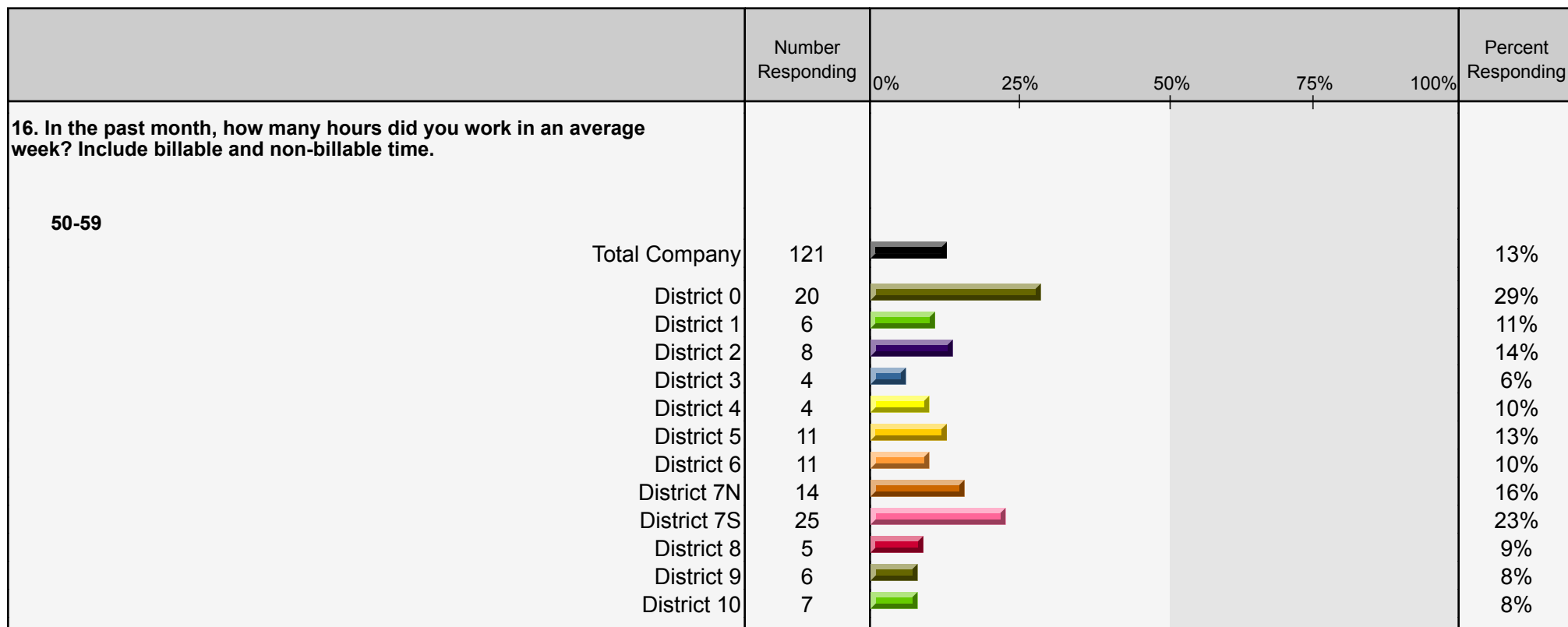
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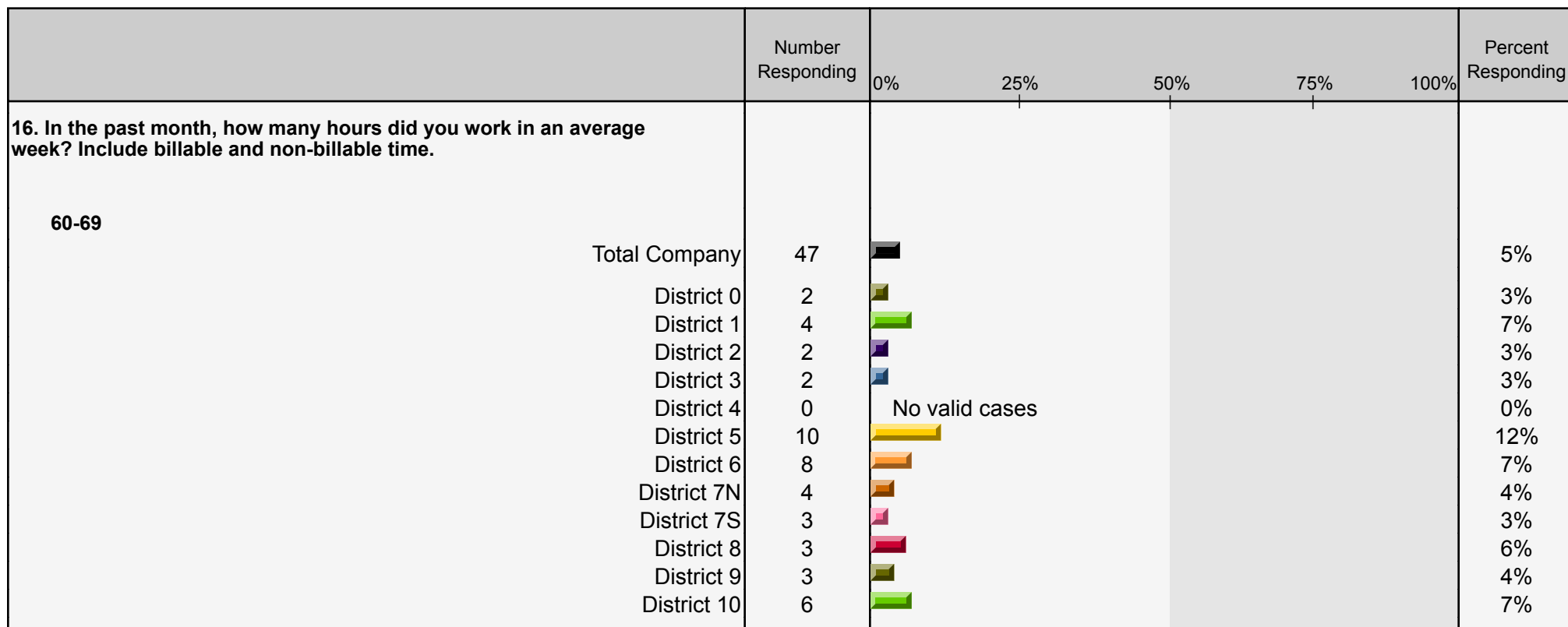
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		Number Responding	0%25%50%75%100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.				
70-79	Total Company	12		1%
	District 0	0	No valid cases	0%
	District 1	0	No valid cases	0%
	District 2	1		2%
	District 3	1		2%
	District 4	0	No valid cases	0%
	District 5	3		3%
	District 6	0	No valid cases	0%
	District 7N	3		3%
	District 7S	1		1%
	District 8	0	No valid cases	0%
	District 9	1		1%
	District 10	2		2%





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		Number Responding	0%	25%	50%	75%	100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.								
80-89	Total Company	9						1%
	District 0	1						1%
	District 1	1						2%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	1						1%
	District 6	2						2%
	District 7N	0	No valid cases					0%
	District 7S	2						2%
	District 8	0	No valid cases					0%
	District 9	2						3%
	District 10	0	No valid cases					0%







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		Number Responding	0%	25%	50%	75%	100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.								
90-99	Total Company	4						0%
	District 0	1						1%
	District 1	0	No valid cases					0%
	District 2	1						2%
	District 3	0	No valid cases					0%
	District 4	1						3%
	District 5	0	No valid cases					0%
	District 6	0	No valid cases					0%
	District 7N	1						1%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%

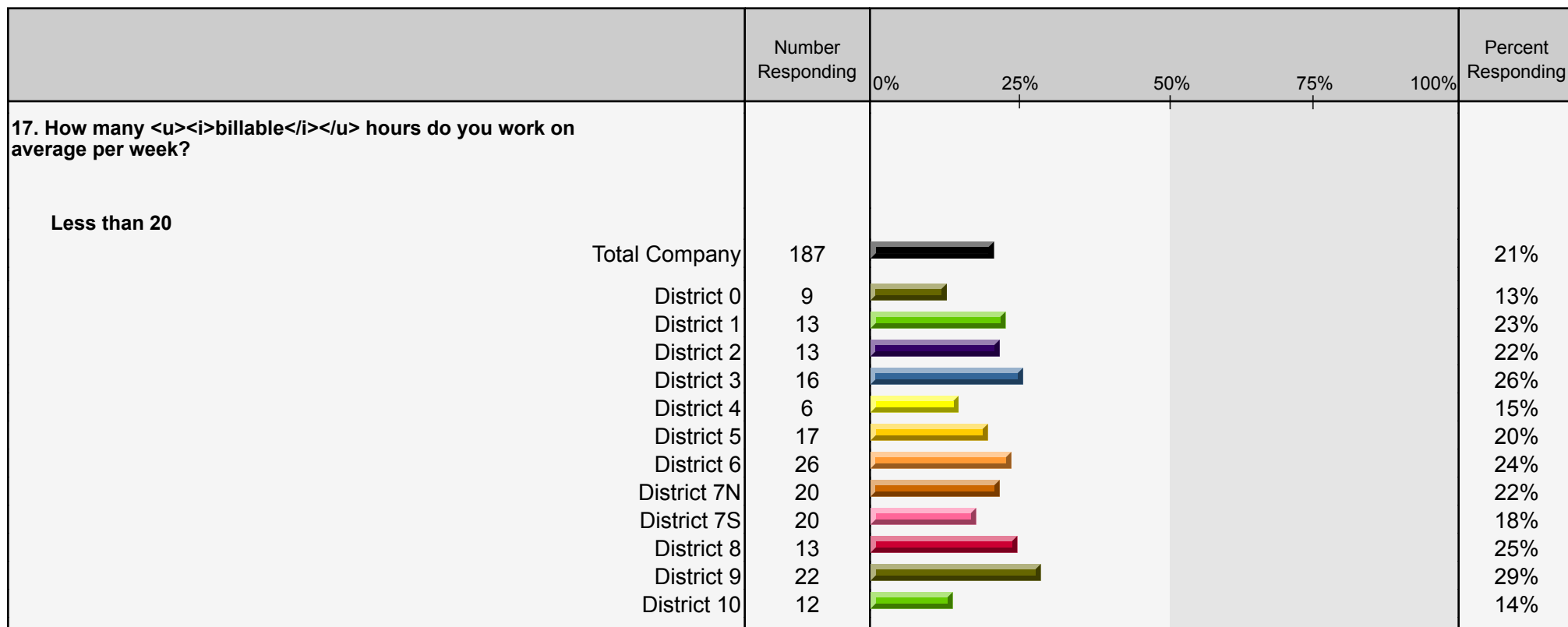
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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		Number Responding	0%25%50%75%100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.				
100 or more				
	Total Company	6		1%
	District 0	1		1%
	District 1	0	No valid cases	0%
	District 2	1		2%
	District 3	0	No valid cases	0%
	District 4	0	No valid cases	0%
	District 5	0	No valid cases	0%
	District 6	0	No valid cases	0%
	District 7N	2		2%
	District 7S	1		1%
	District 8	0	No valid cases	0%
	District 9	0	No valid cases	0%
	District 10	1		1%

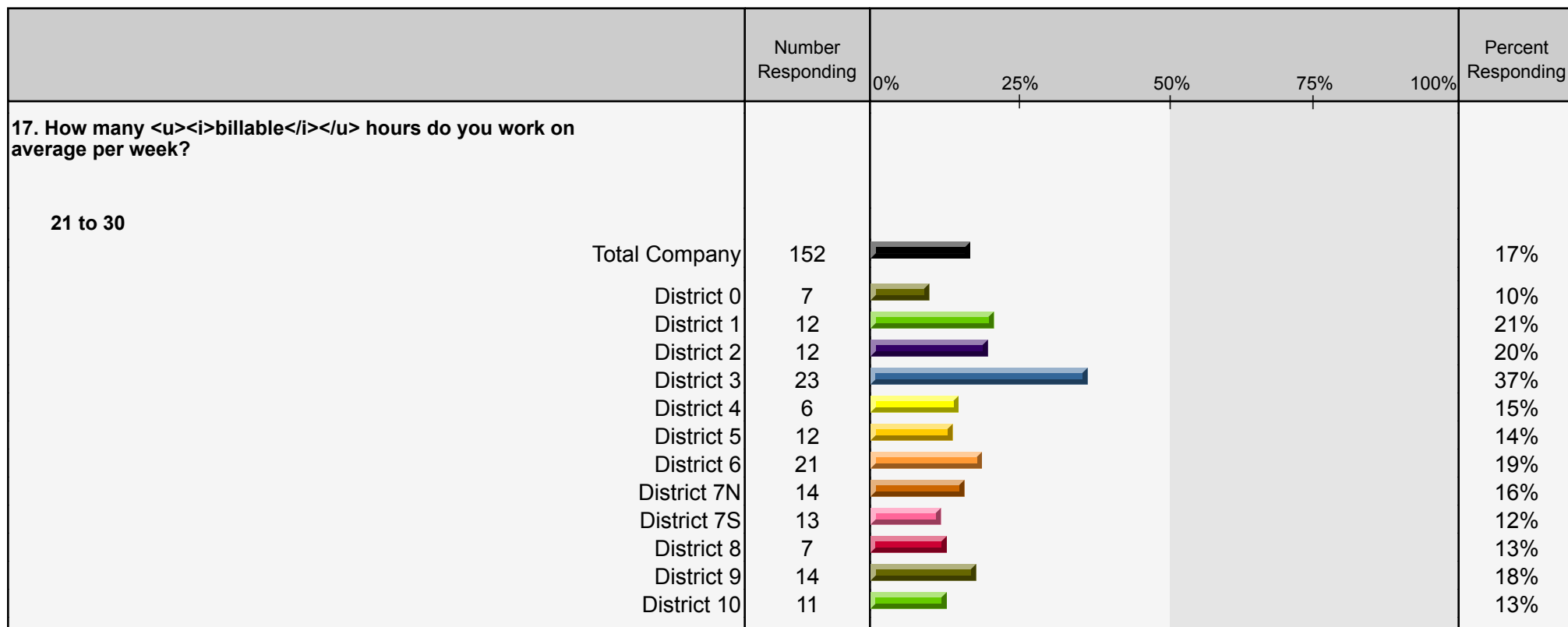
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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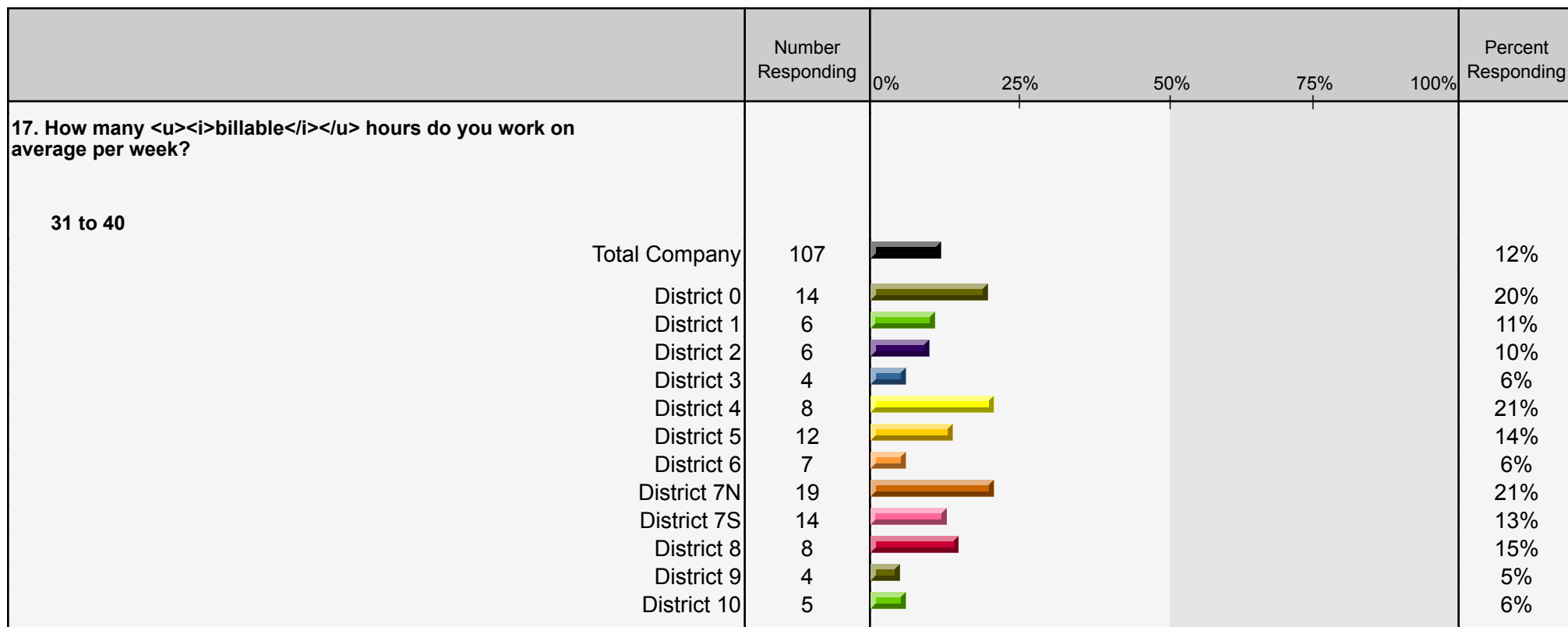
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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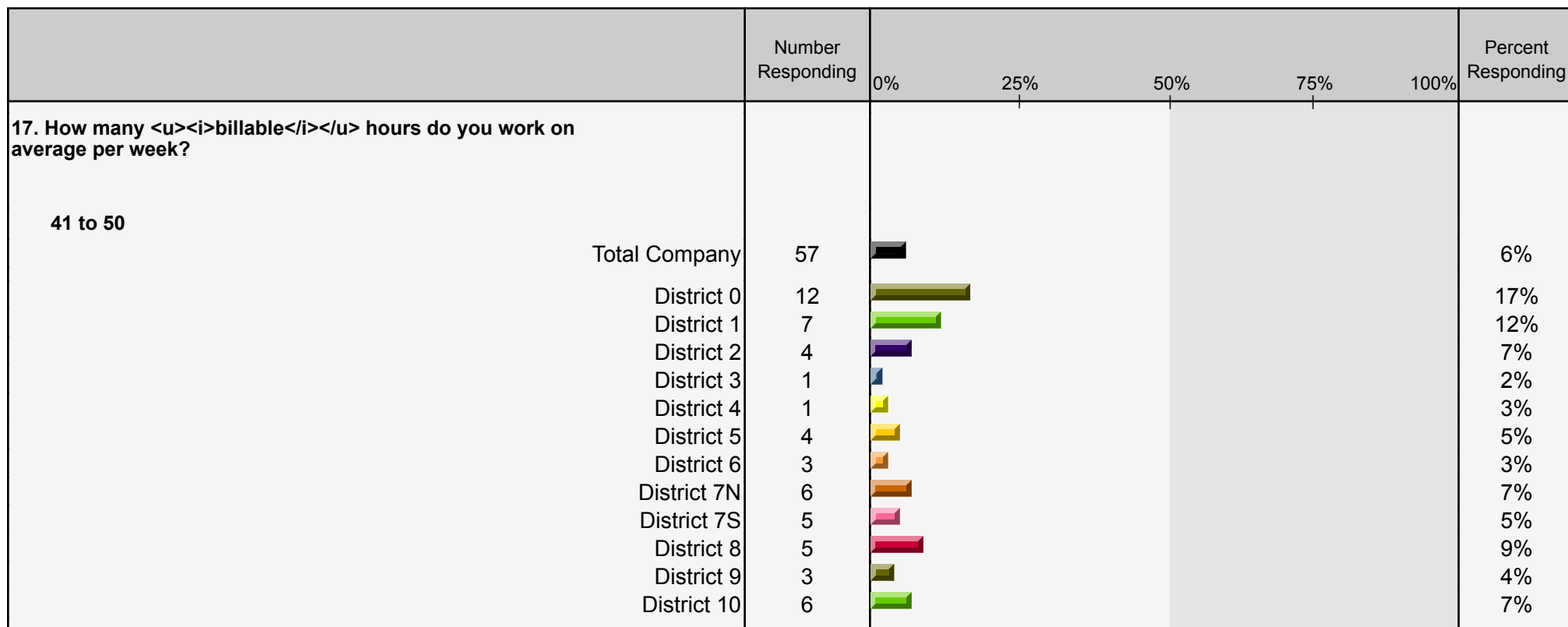
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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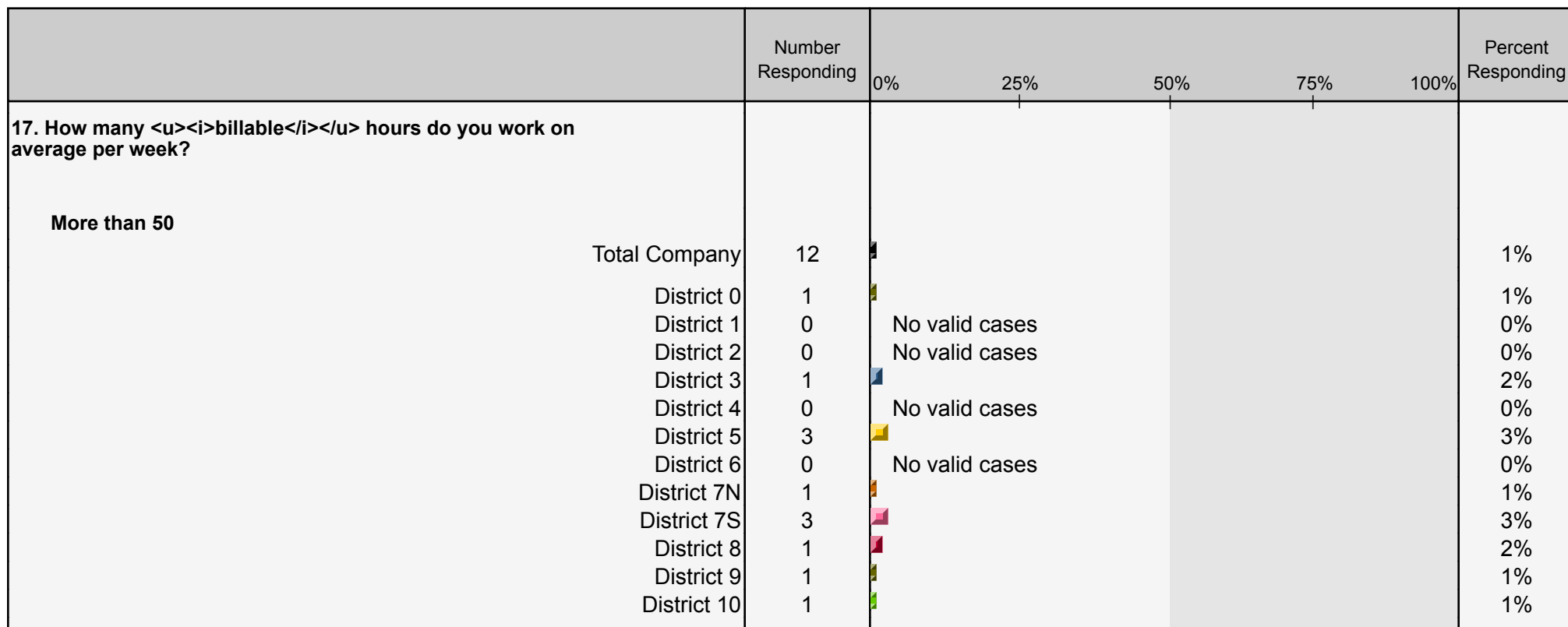
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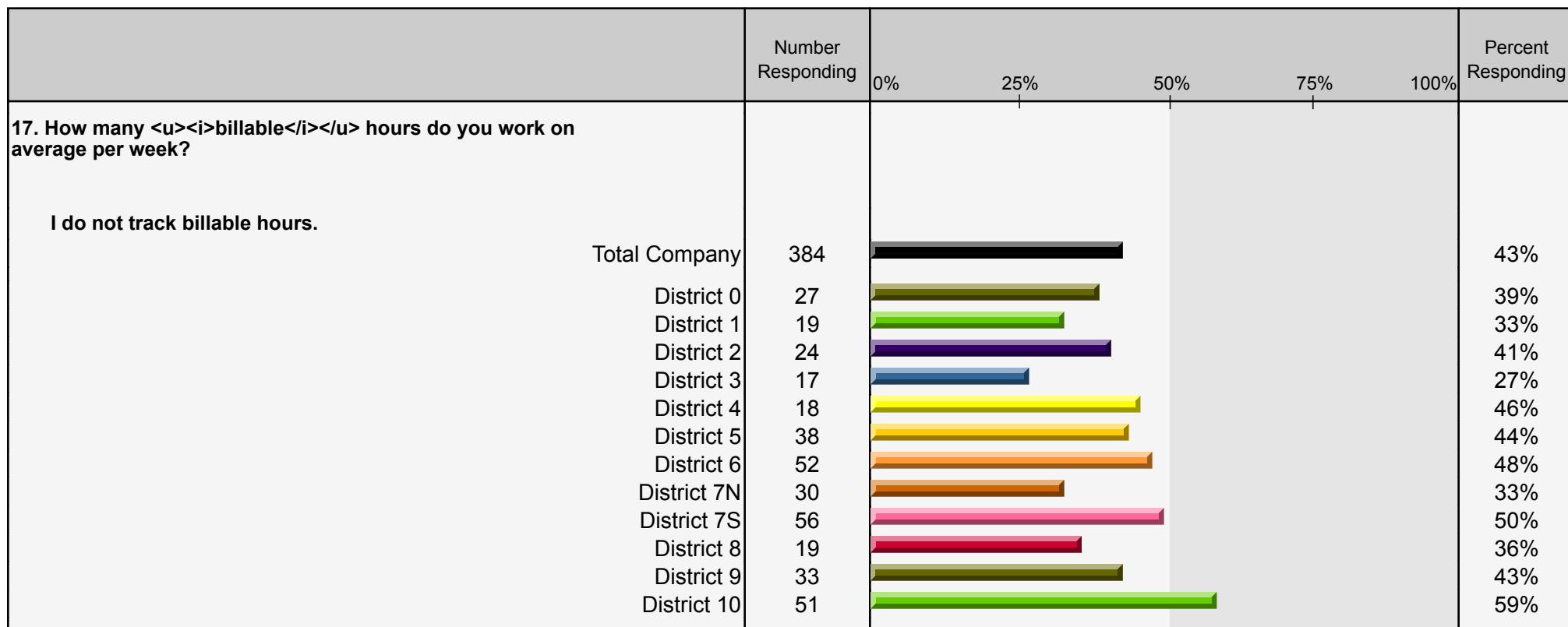
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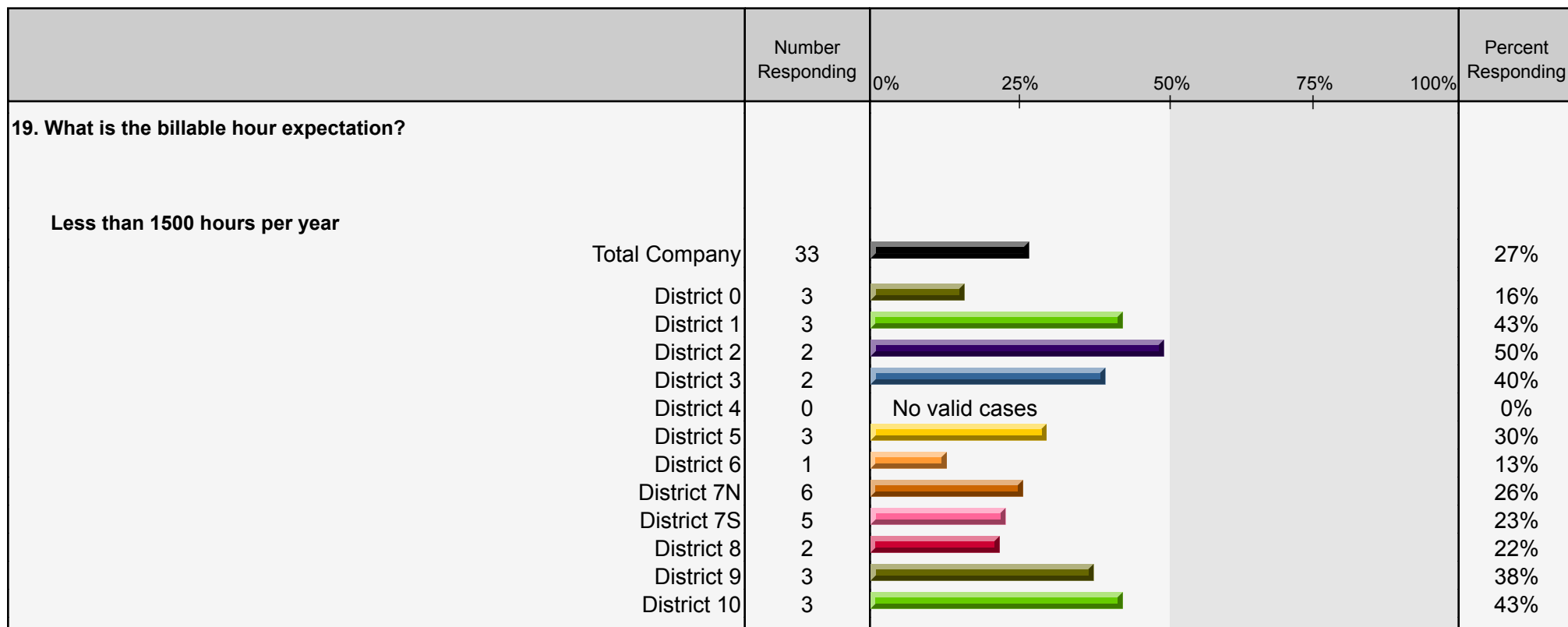
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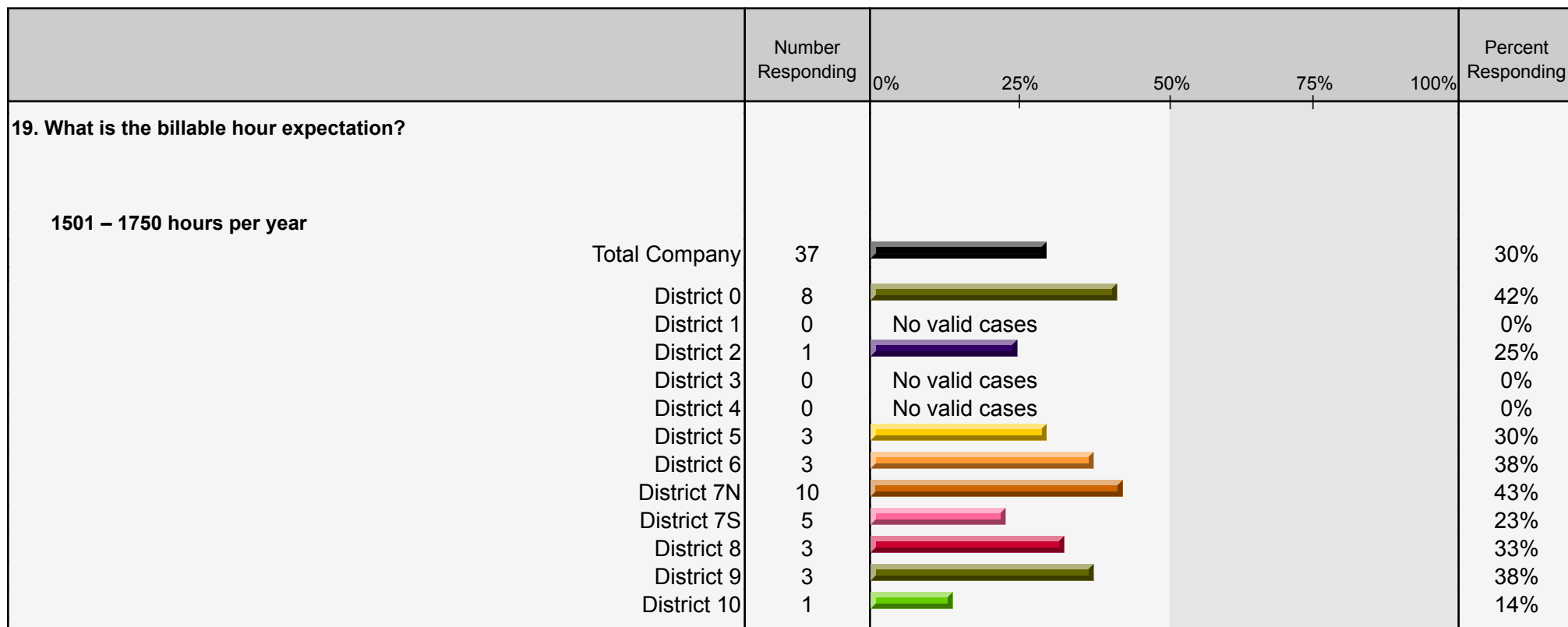
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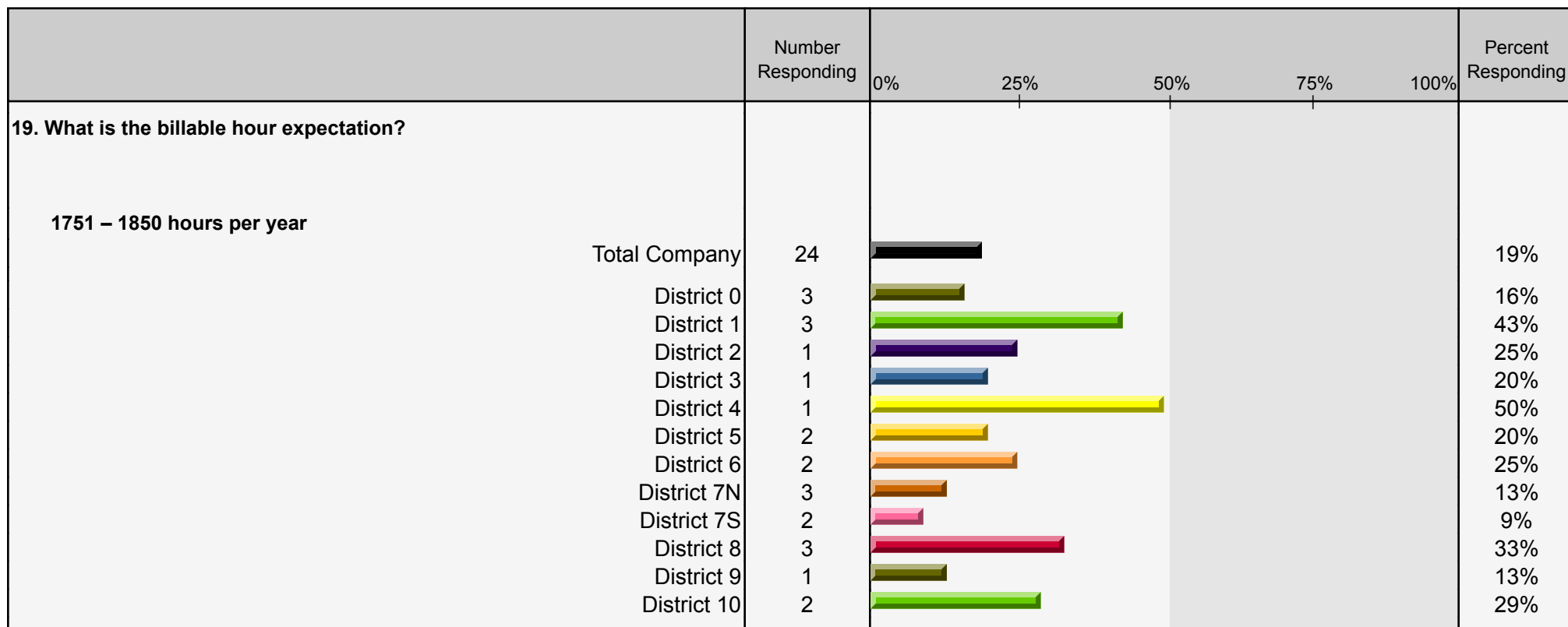
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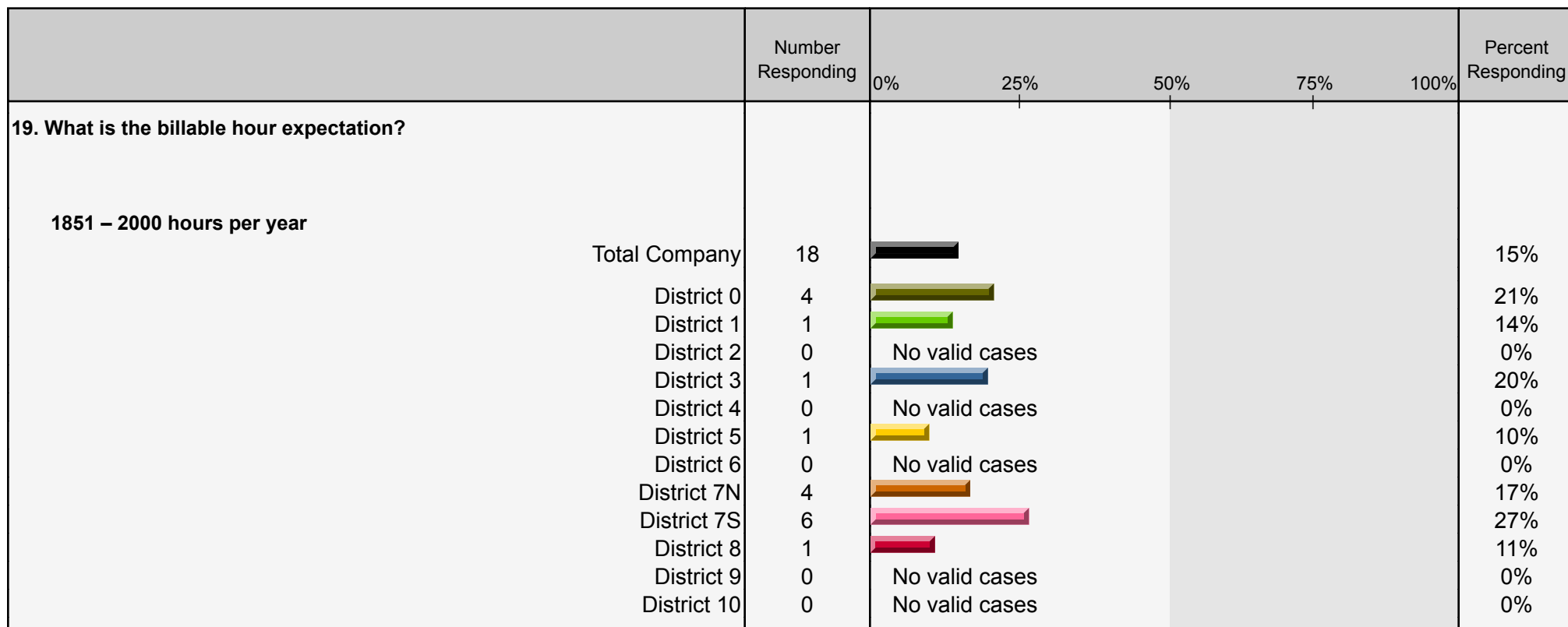
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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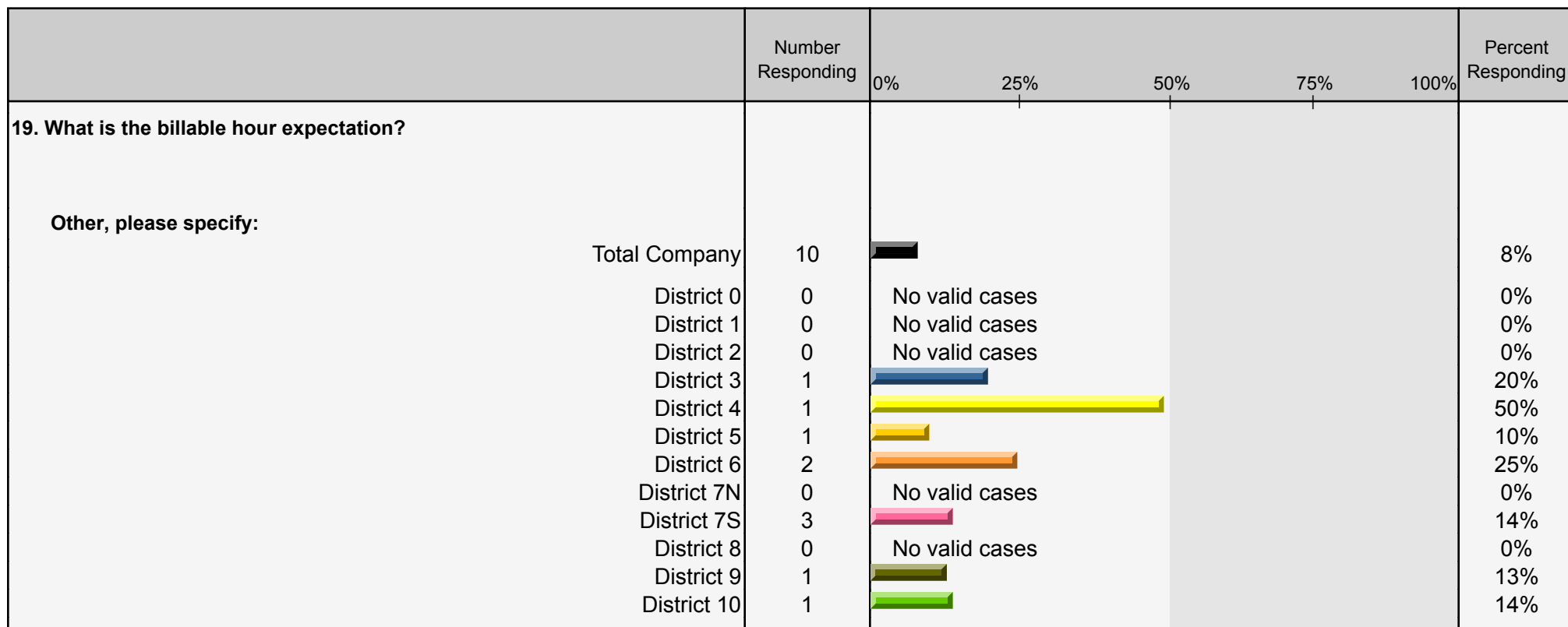
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	Number Responding	0%25%50%75%100%	Percent Responding
19. What is the billable hour expectation?			
2001 – 2200 hours per year			
Total Company	2		2%
District 0	1		5%
District 1	0	No valid cases	0%
District 2	0	No valid cases	0%
District 3	0	No valid cases	0%
District 4	0	No valid cases	0%
District 5	0	No valid cases	0%
District 6	0	No valid cases	0%
District 7N	0	No valid cases	0%
District 7S	1		5%
District 8	0	No valid cases	0%
District 9	0	No valid cases	0%
District 10	0	No valid cases	0%

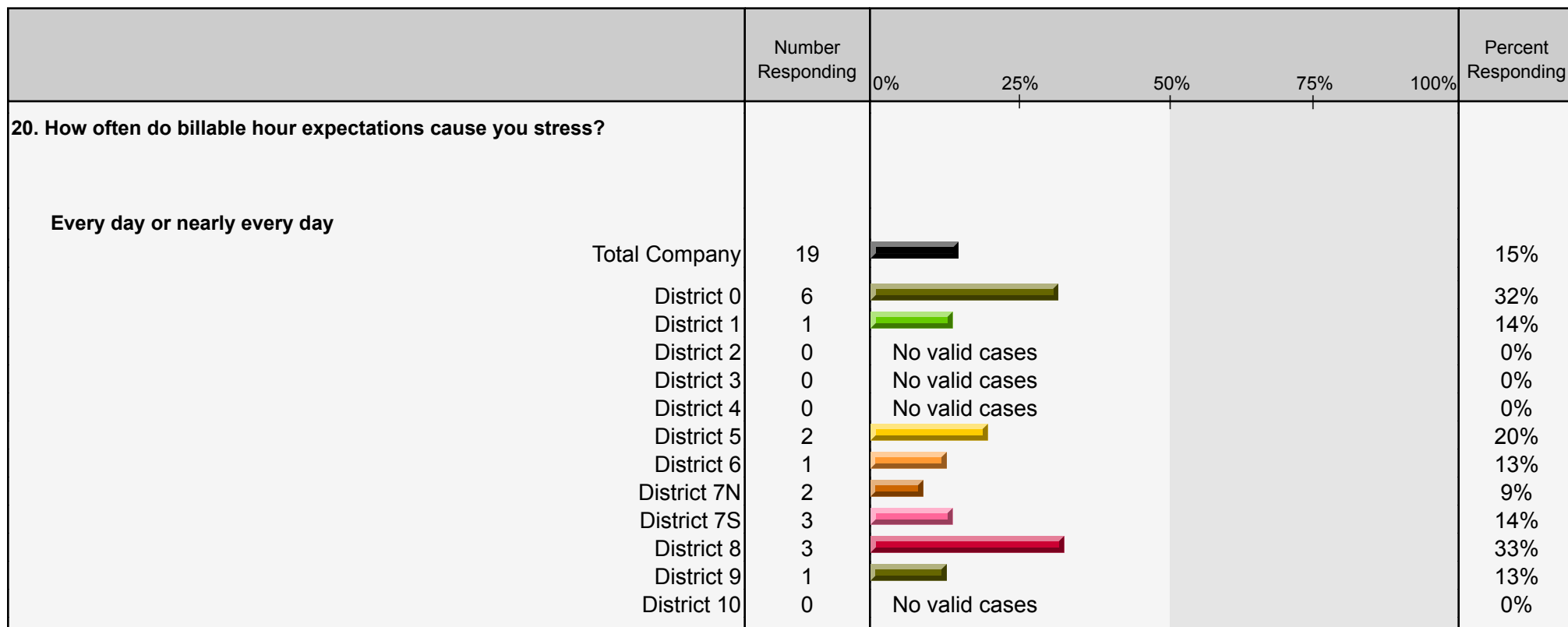
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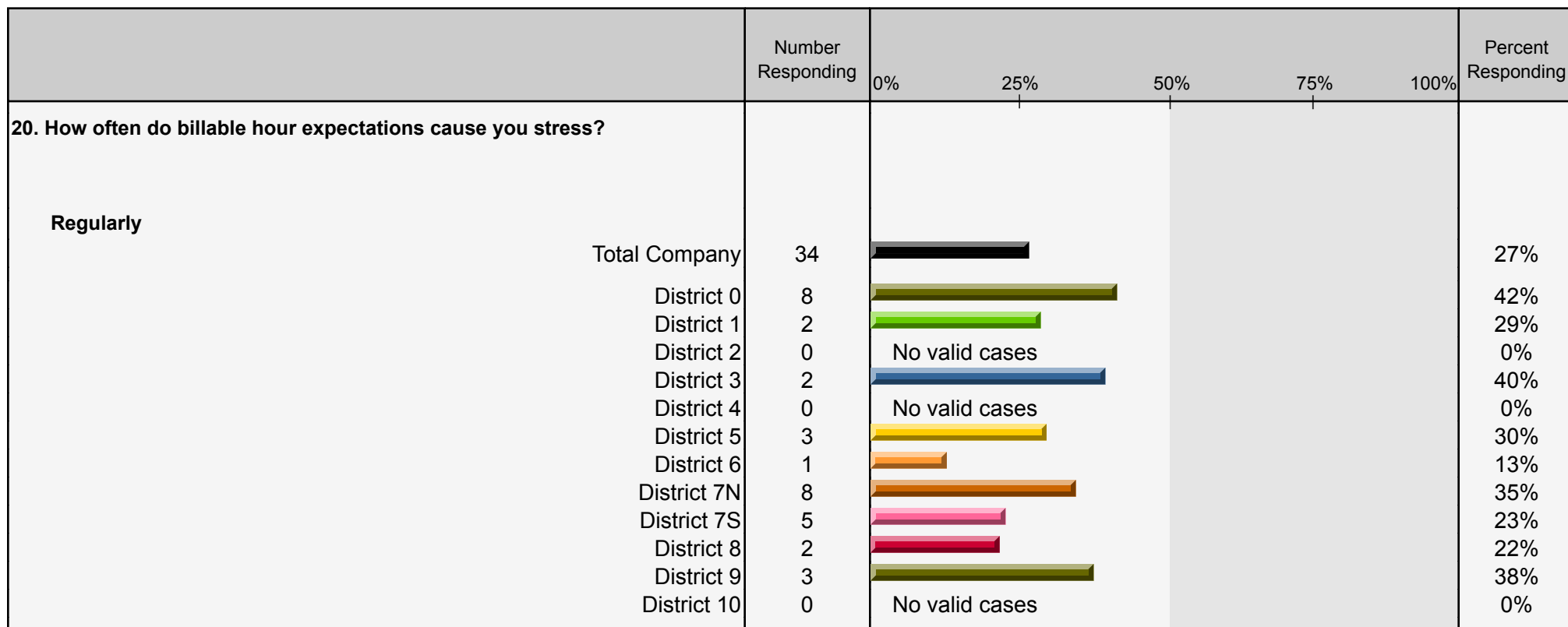
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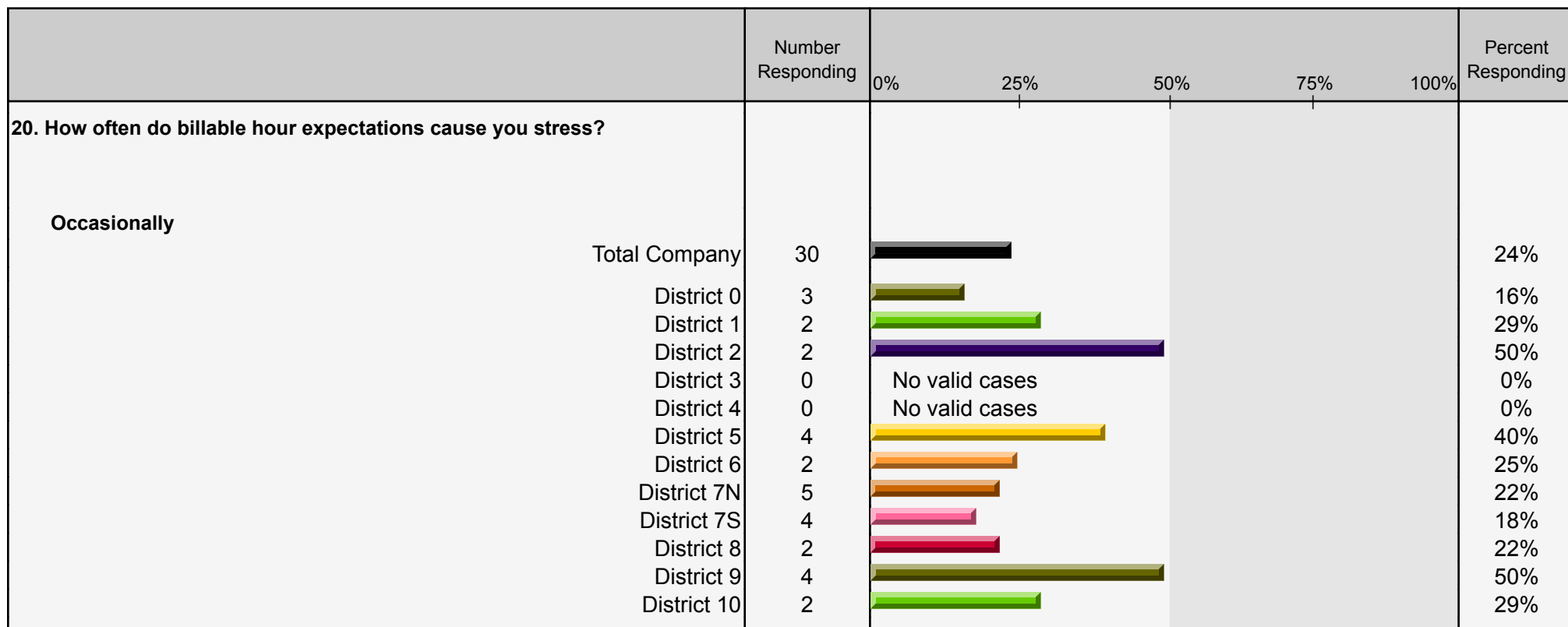
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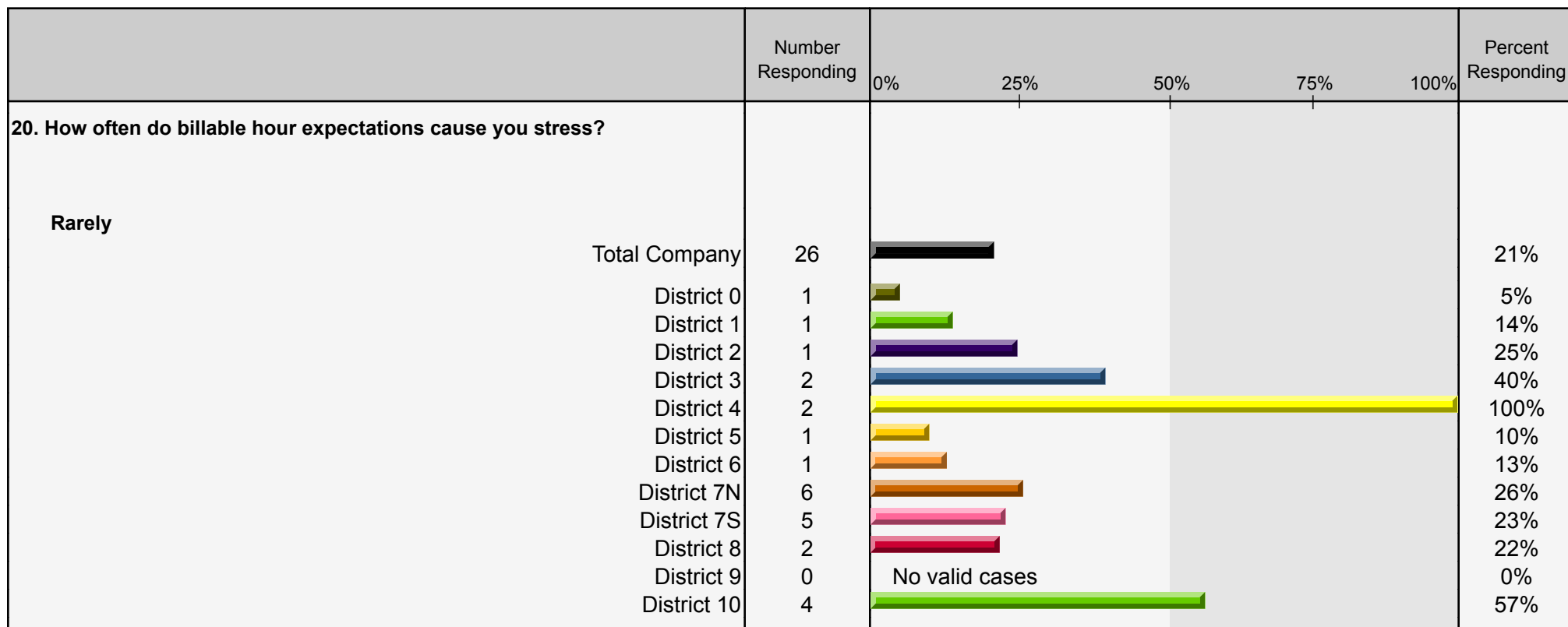
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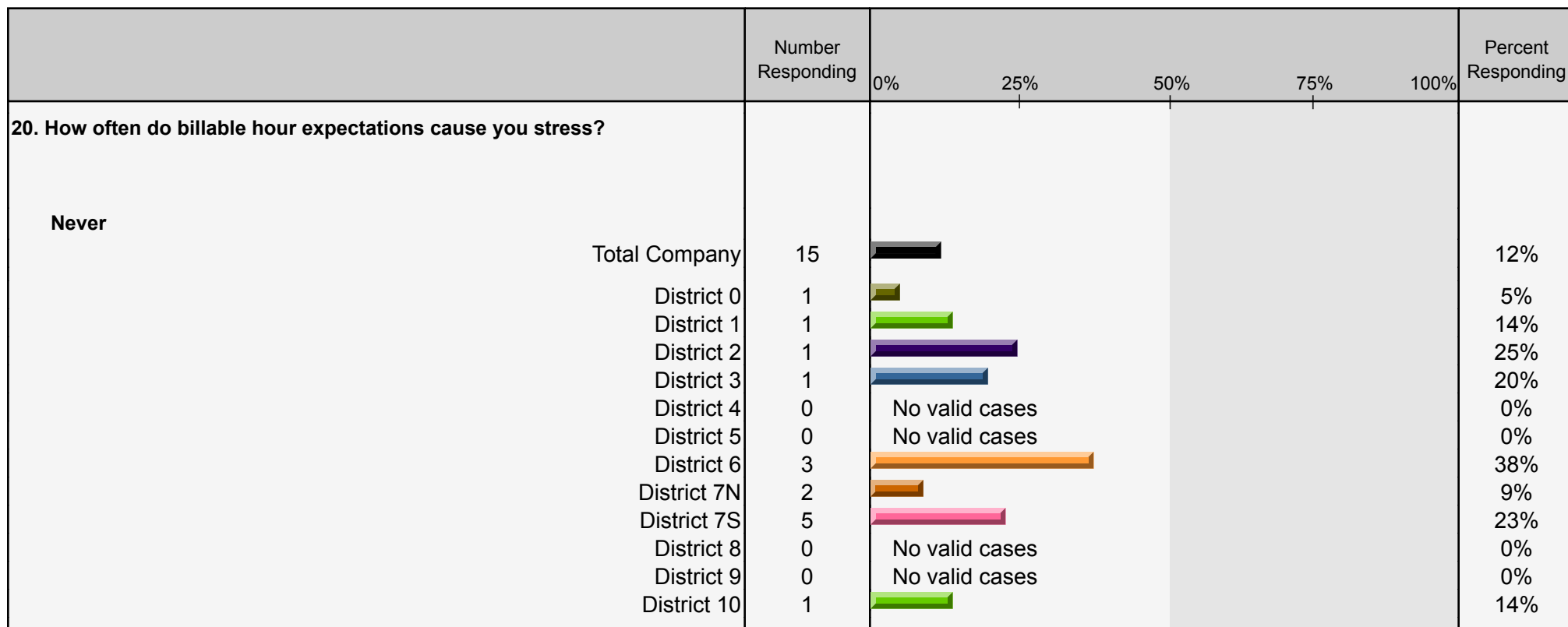
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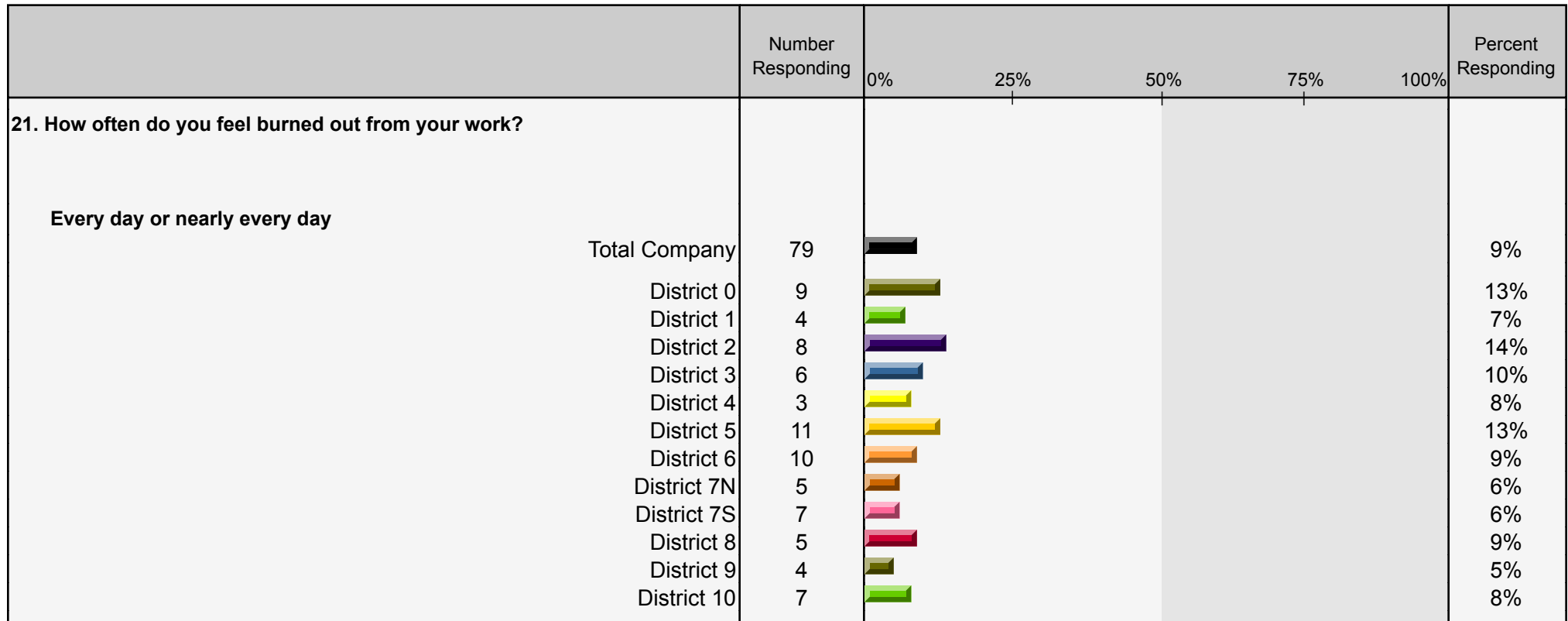
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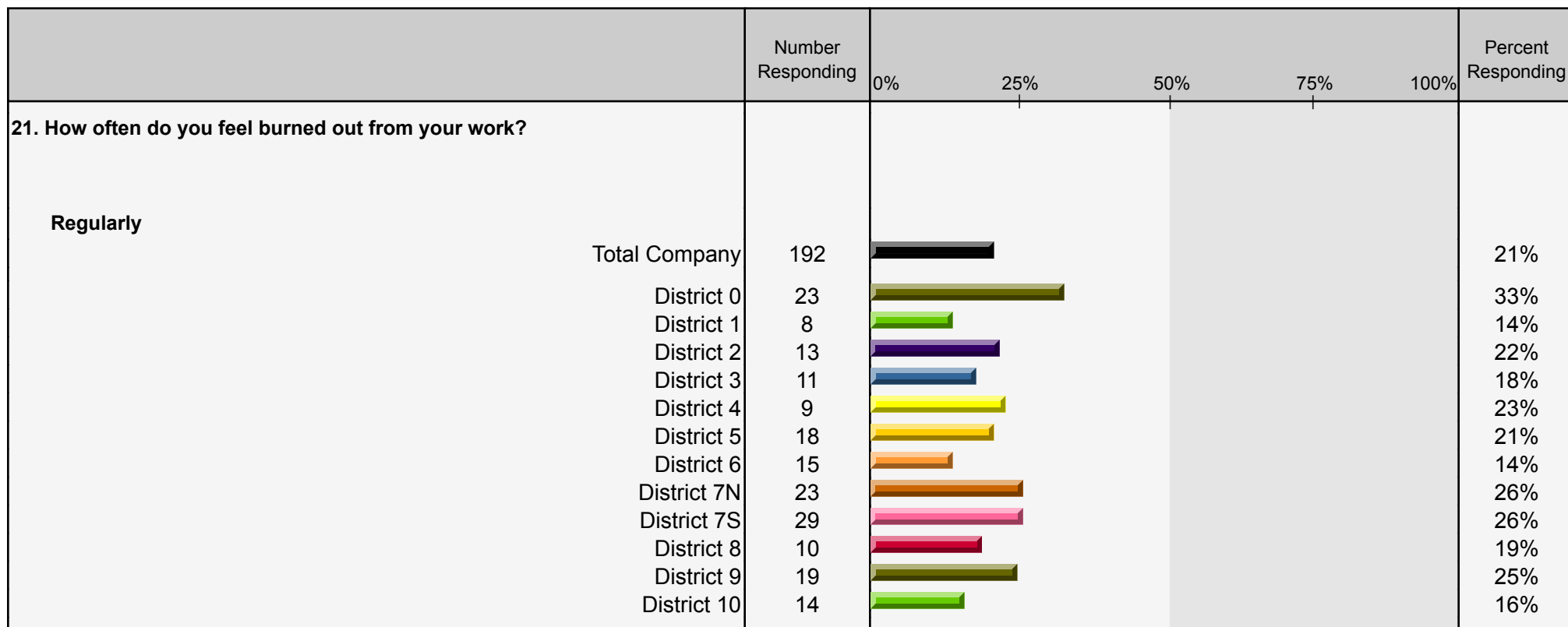
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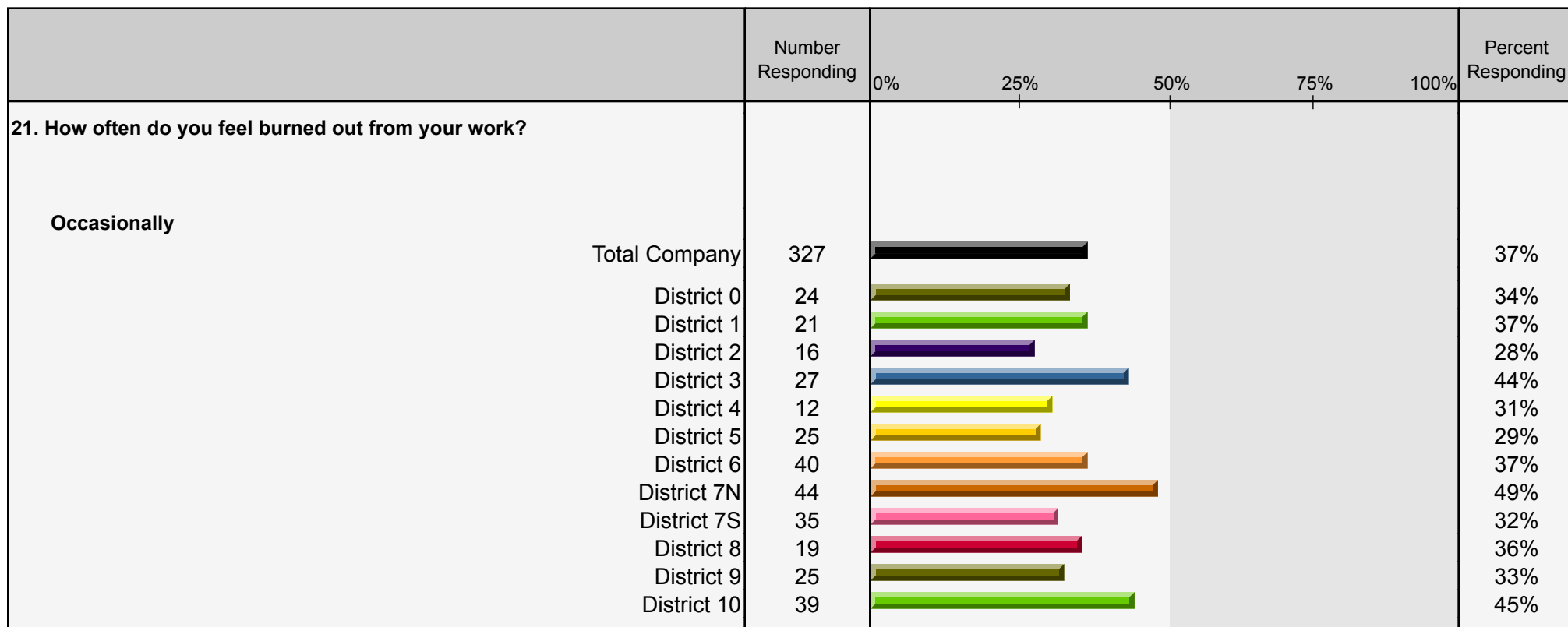
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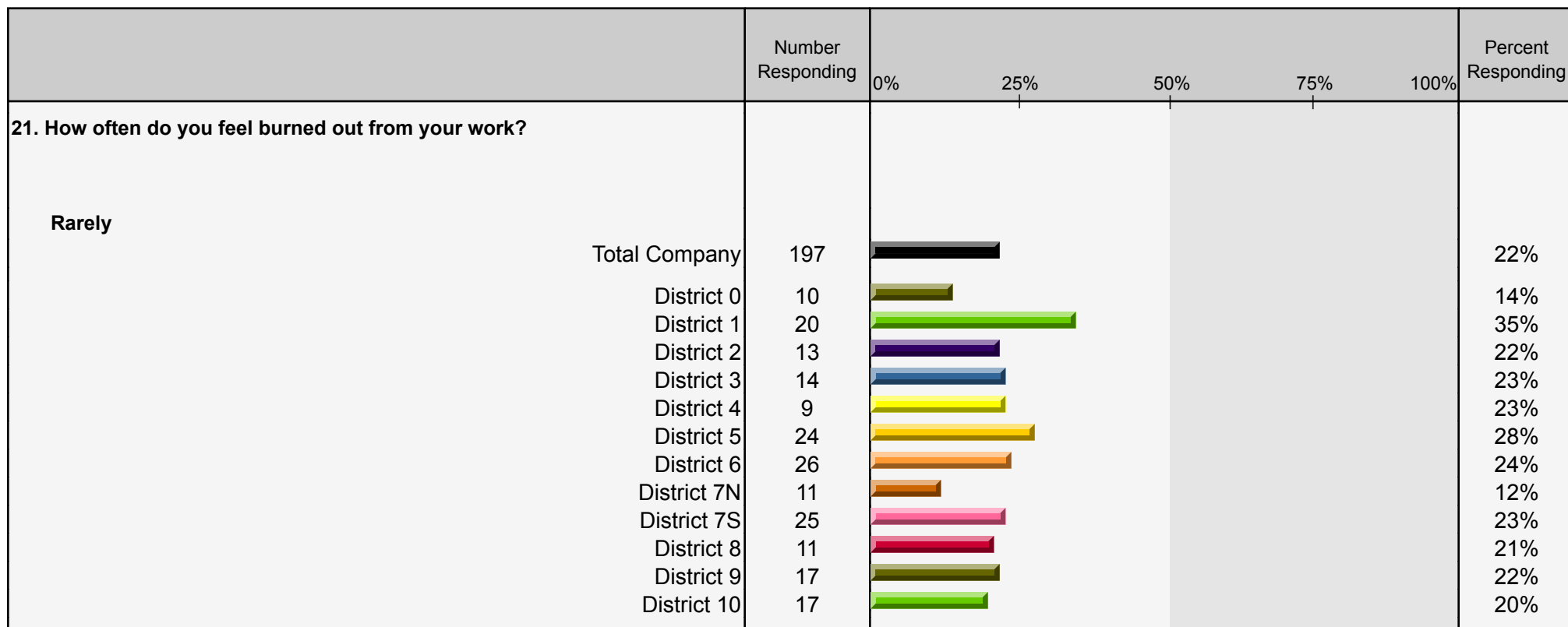
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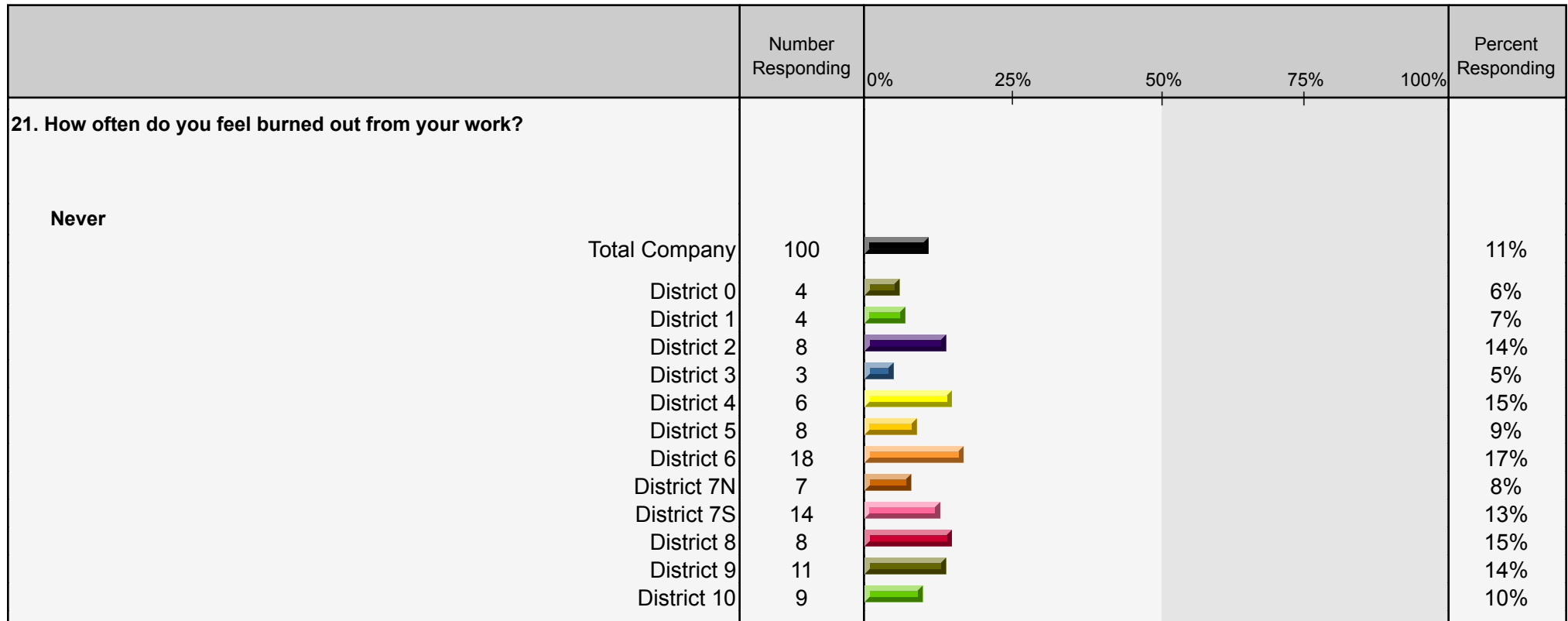
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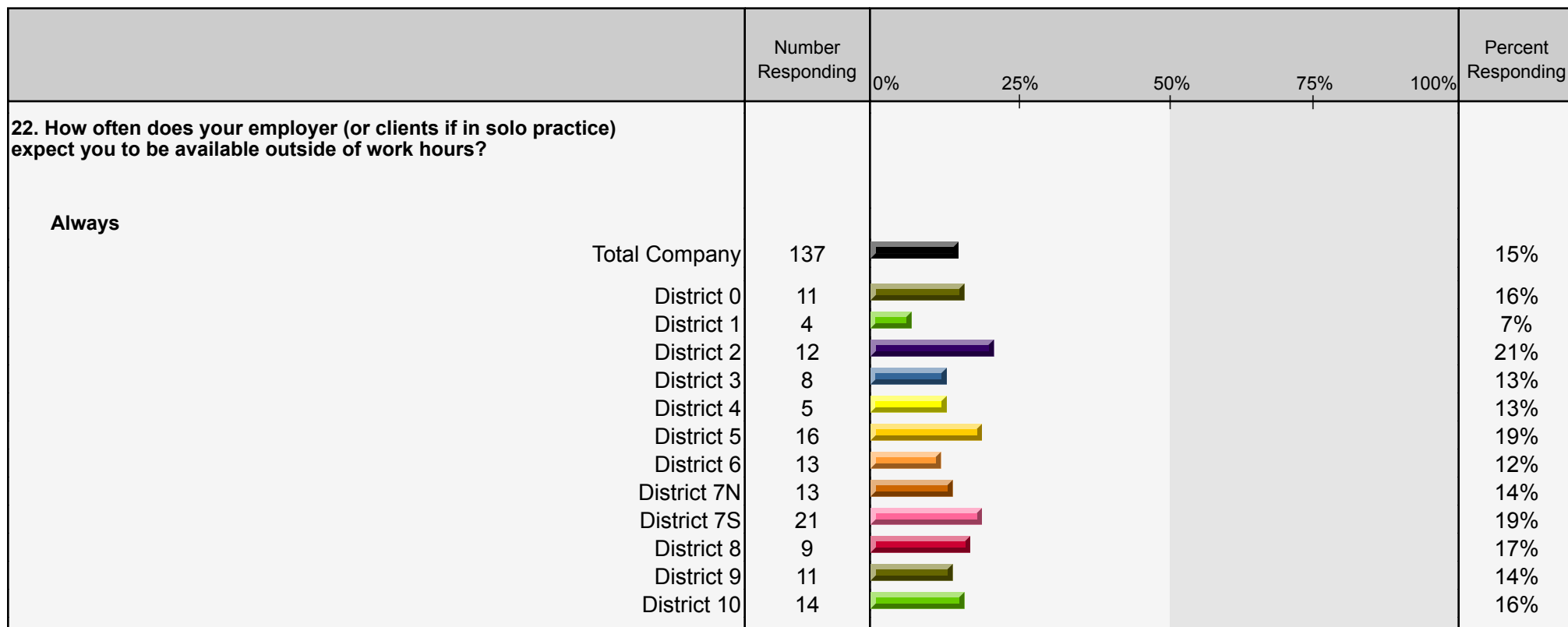
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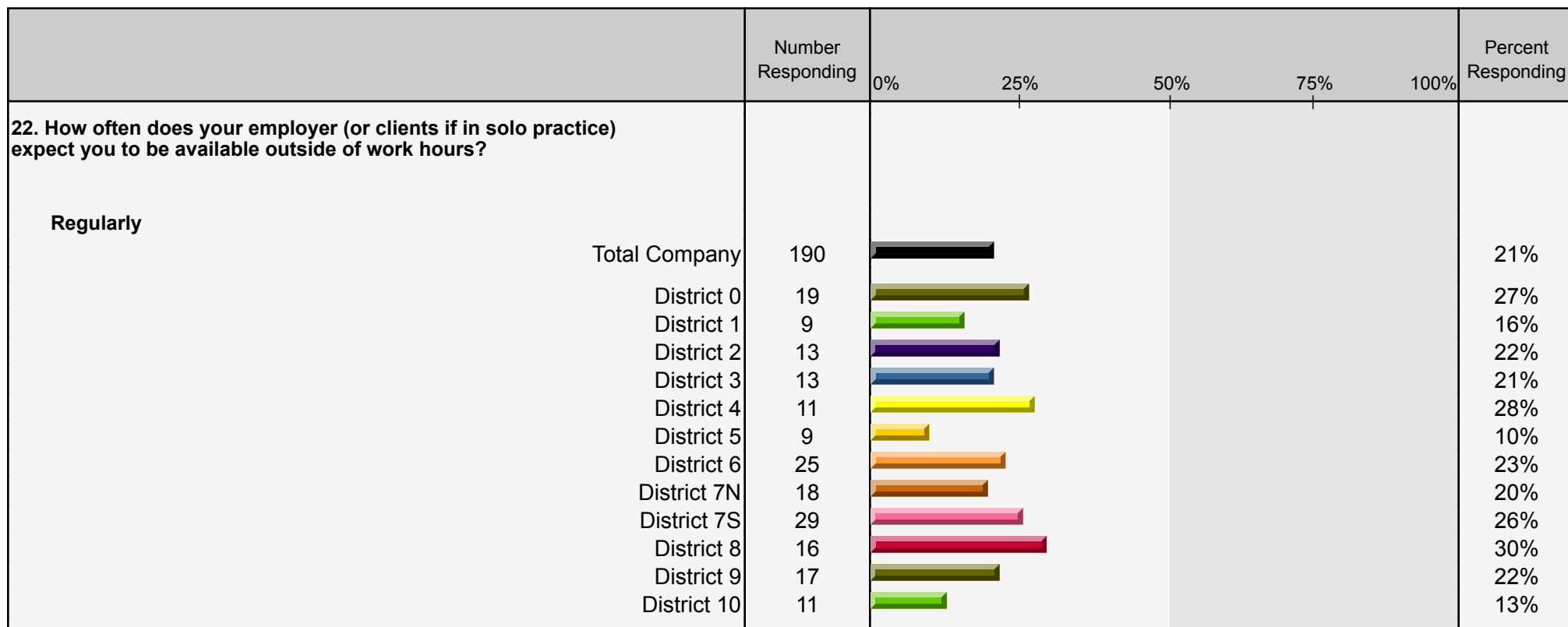
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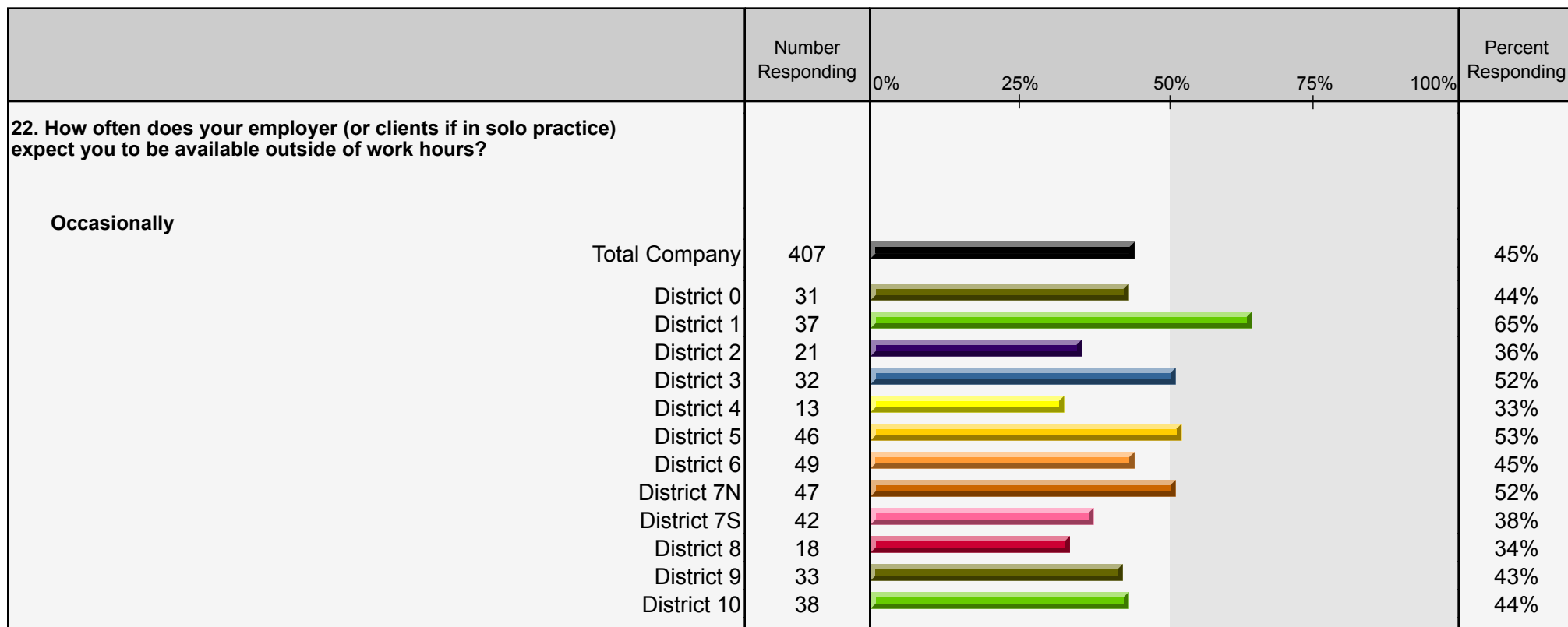
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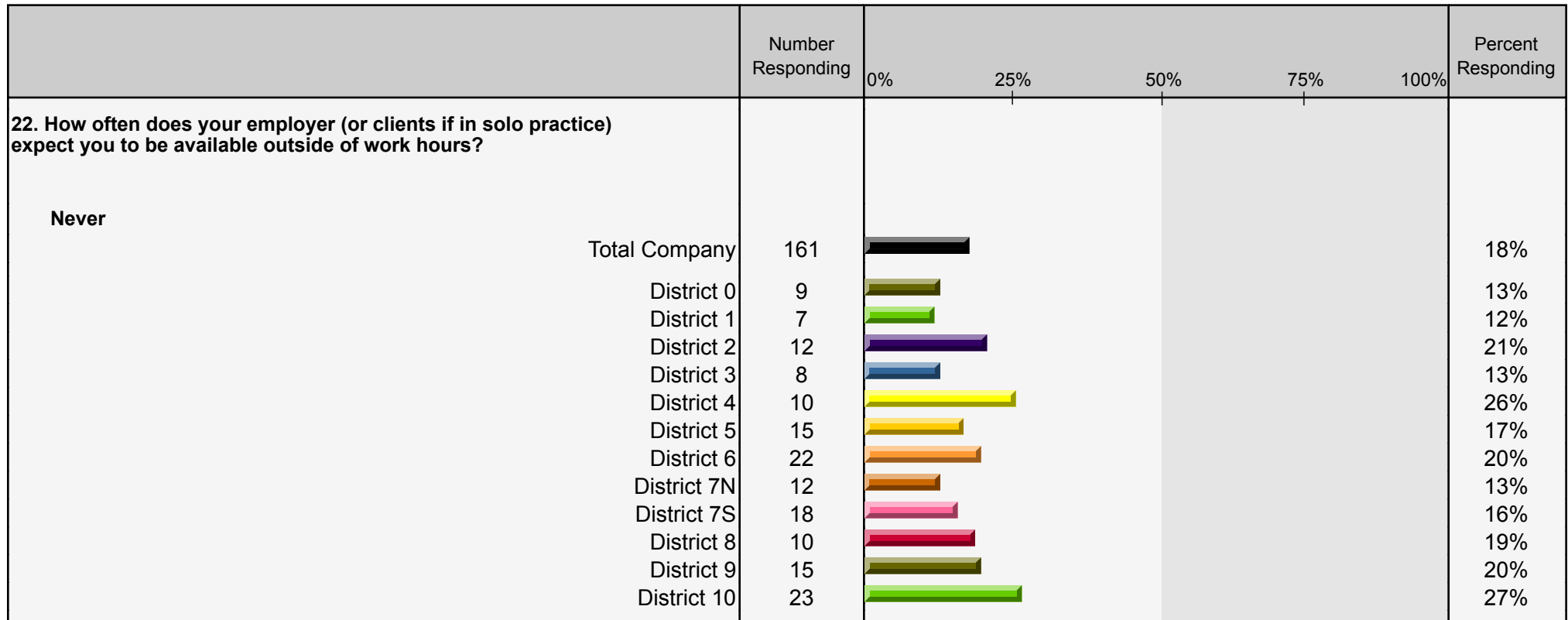
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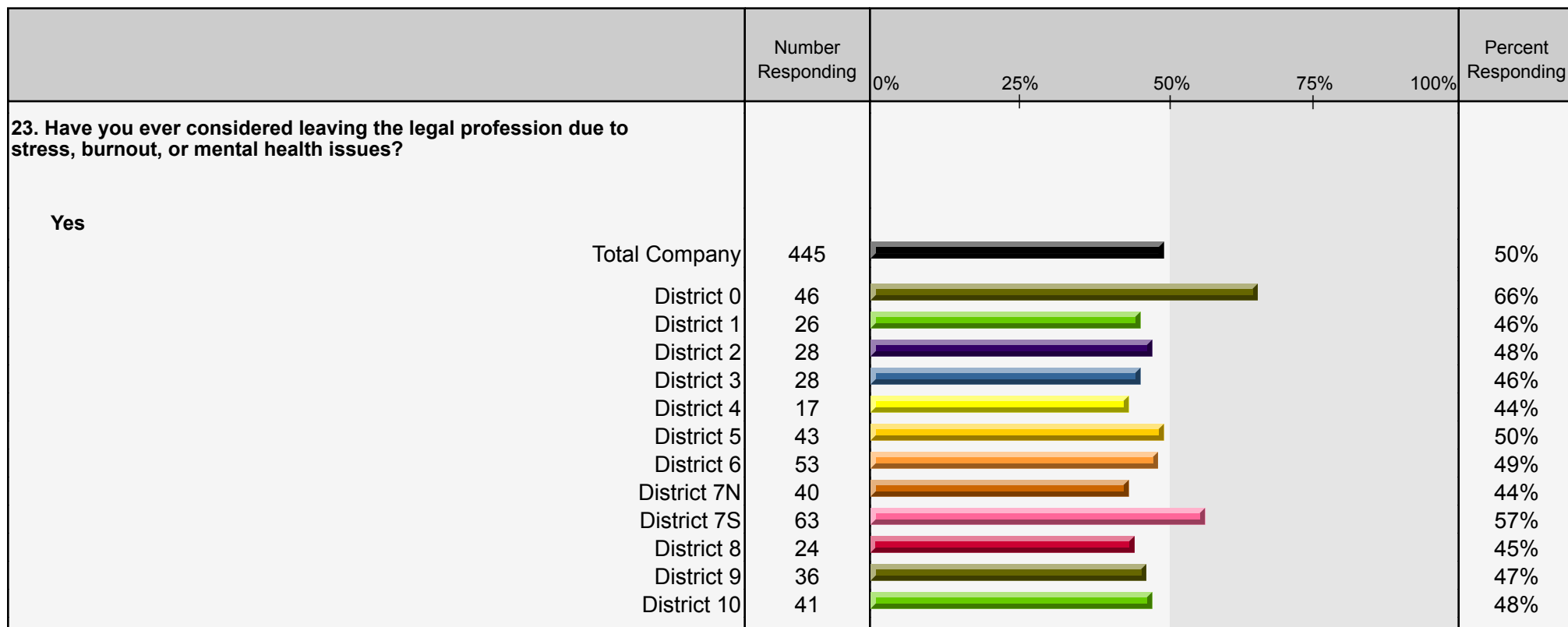
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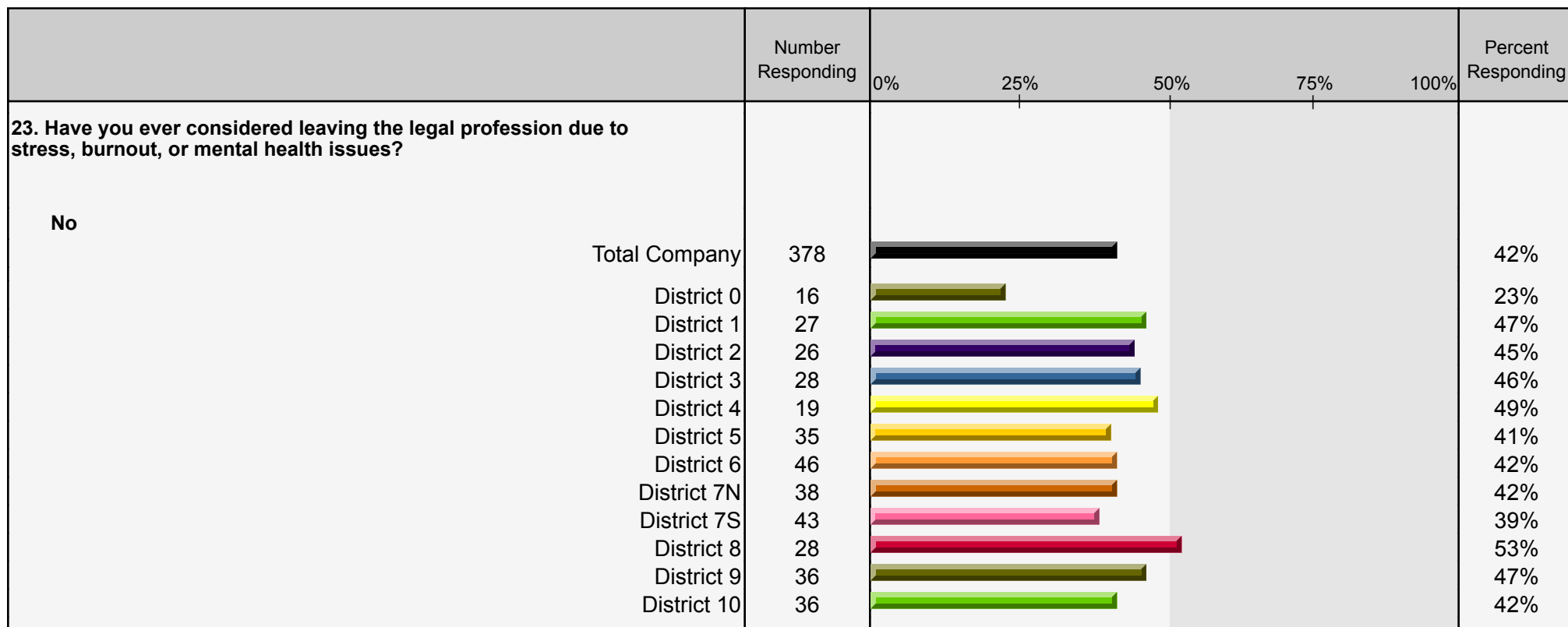
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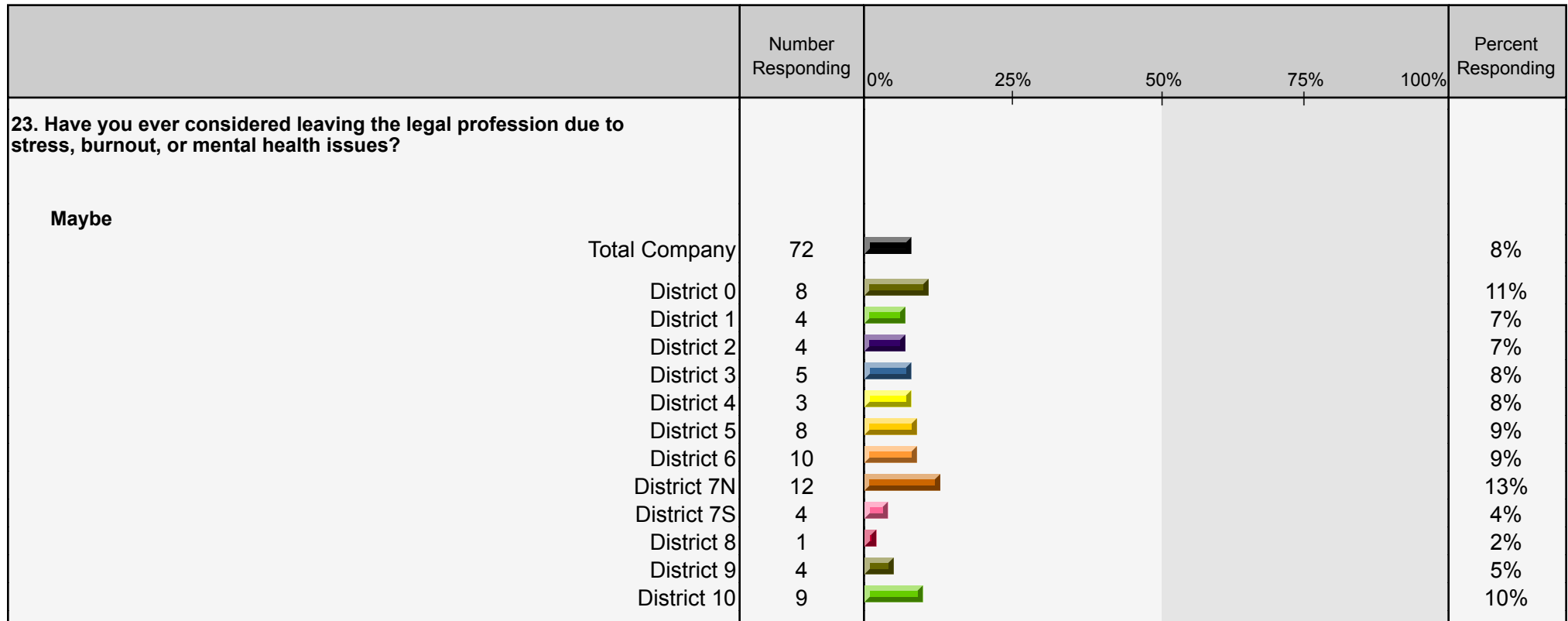
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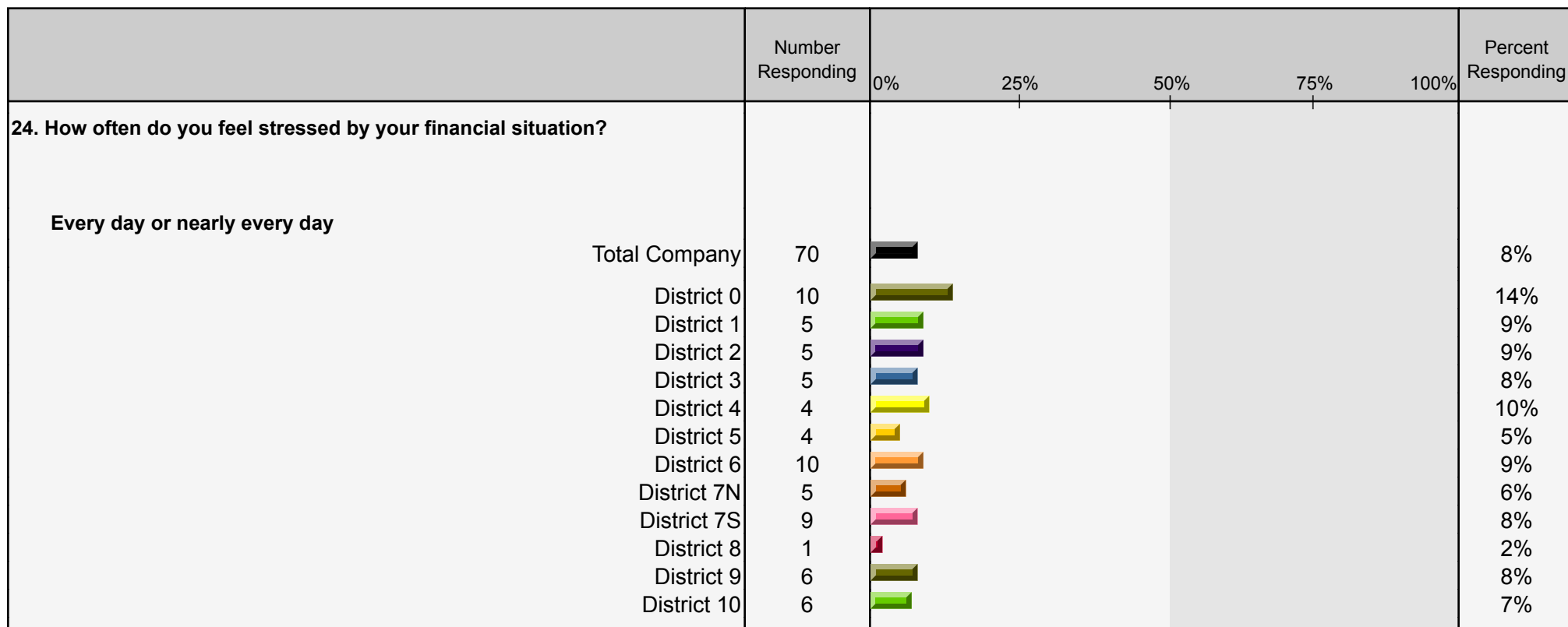
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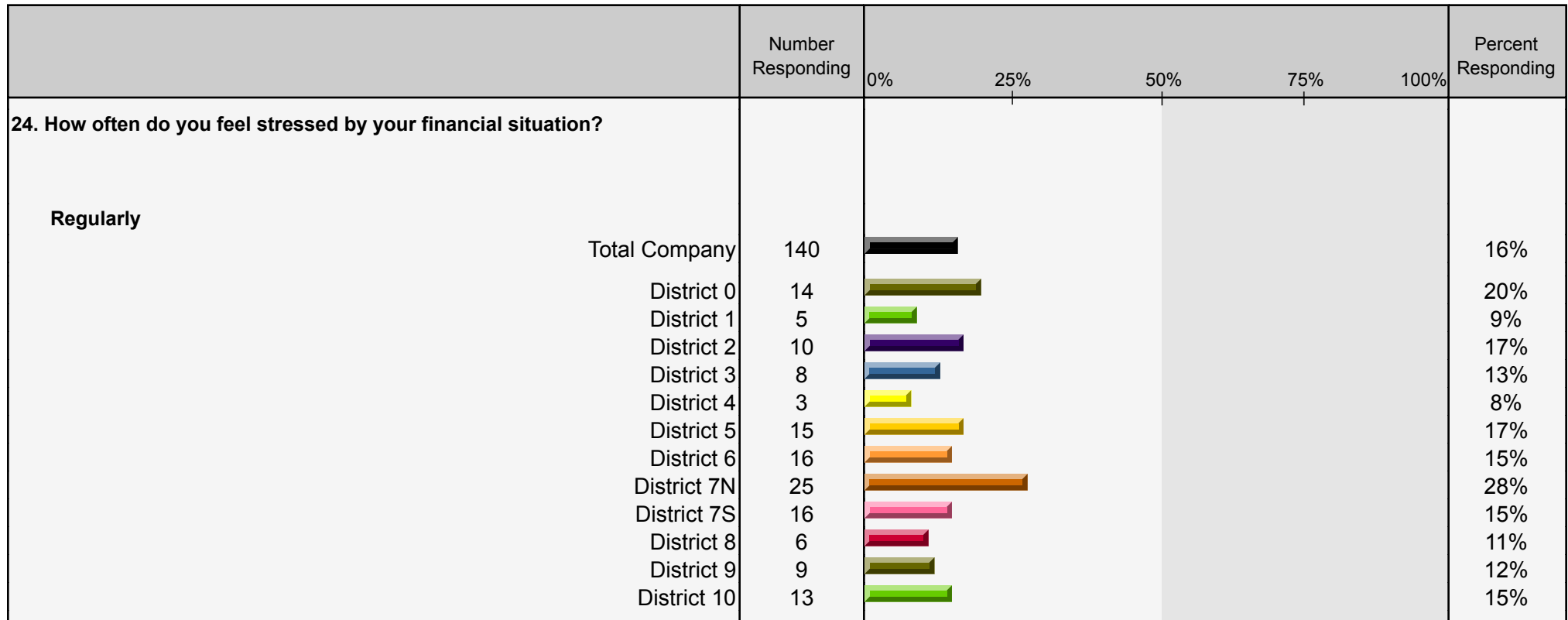
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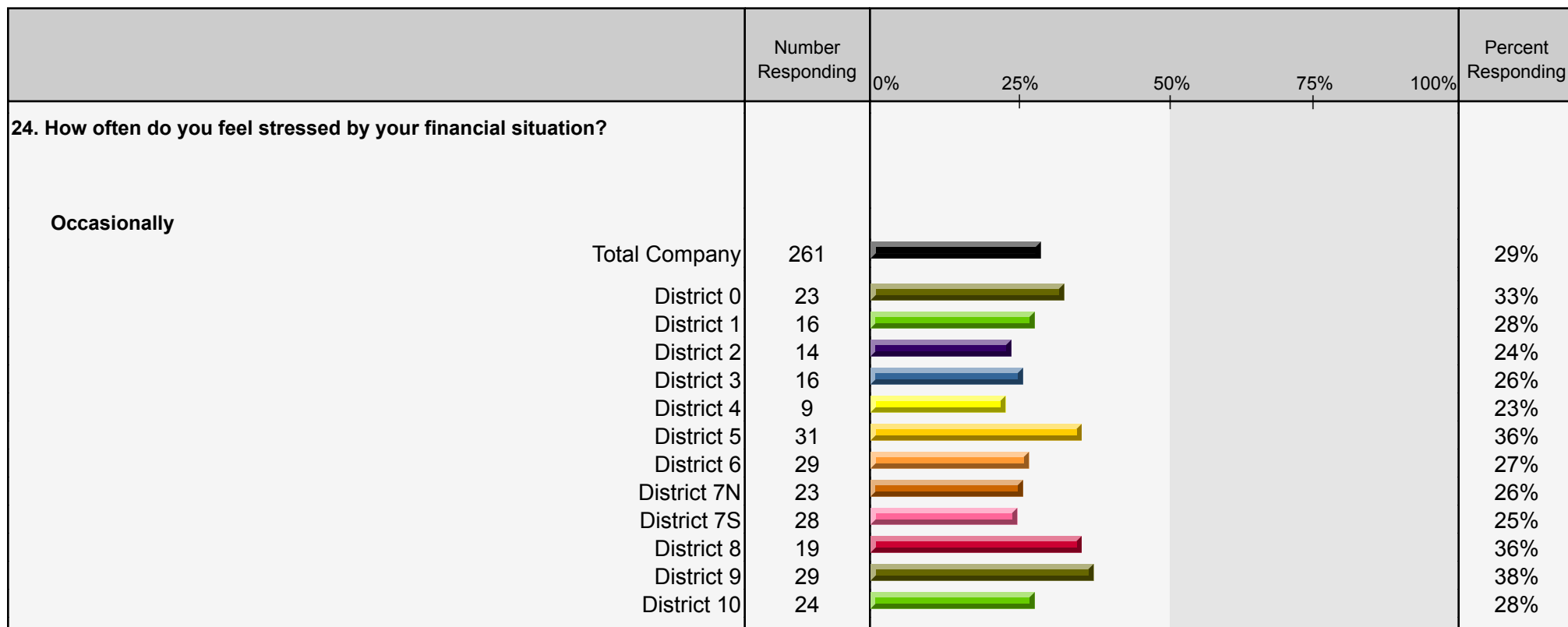
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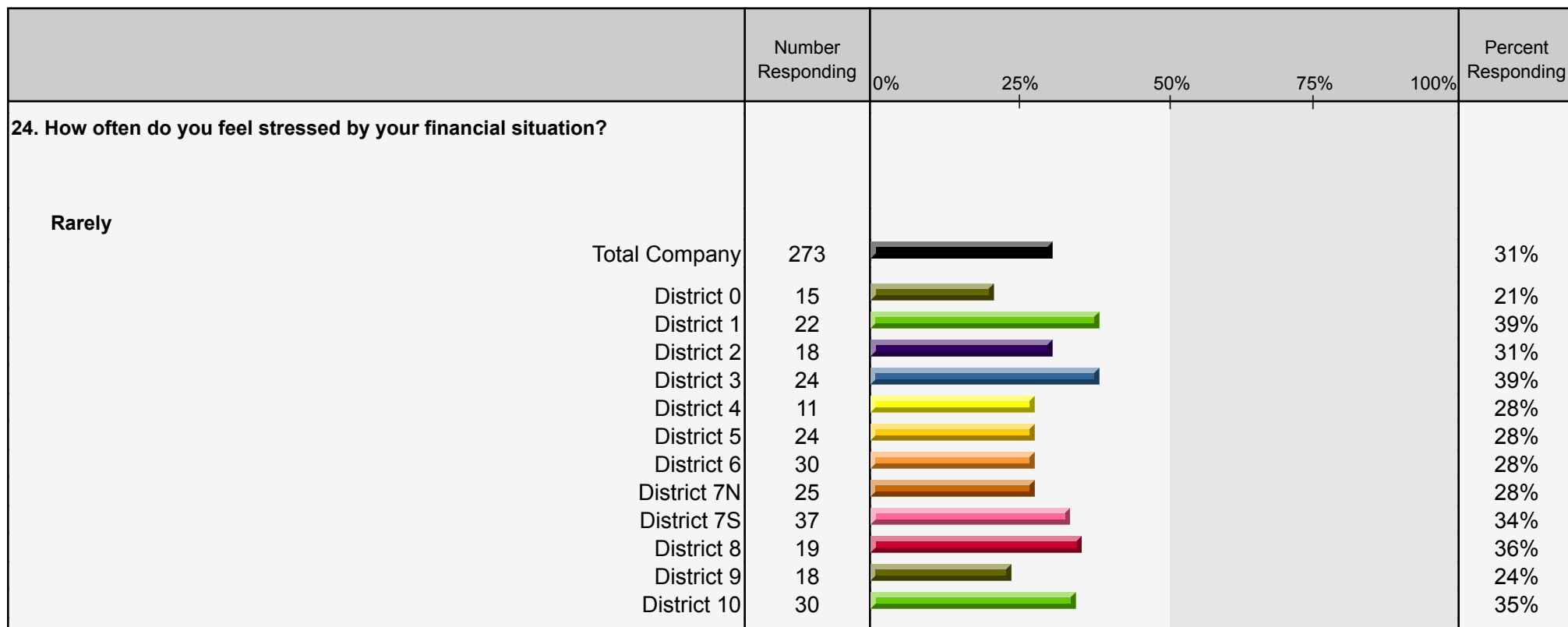
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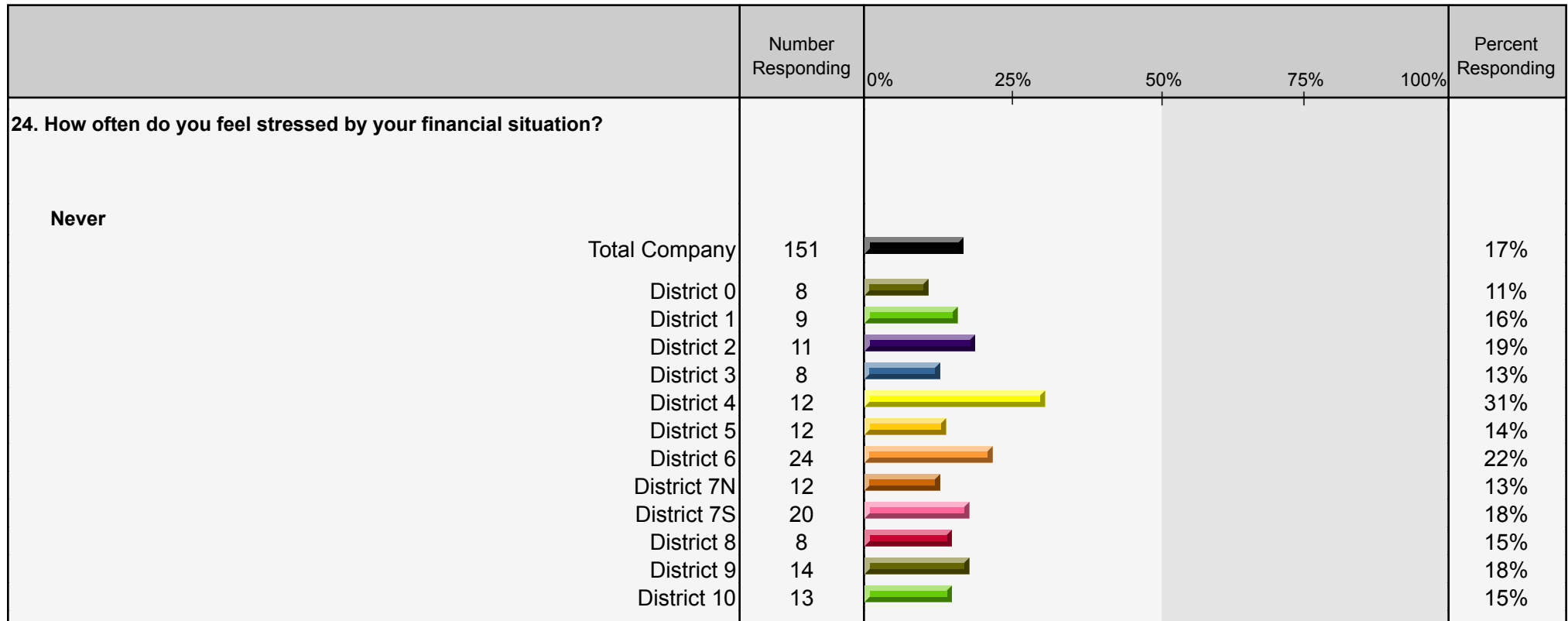
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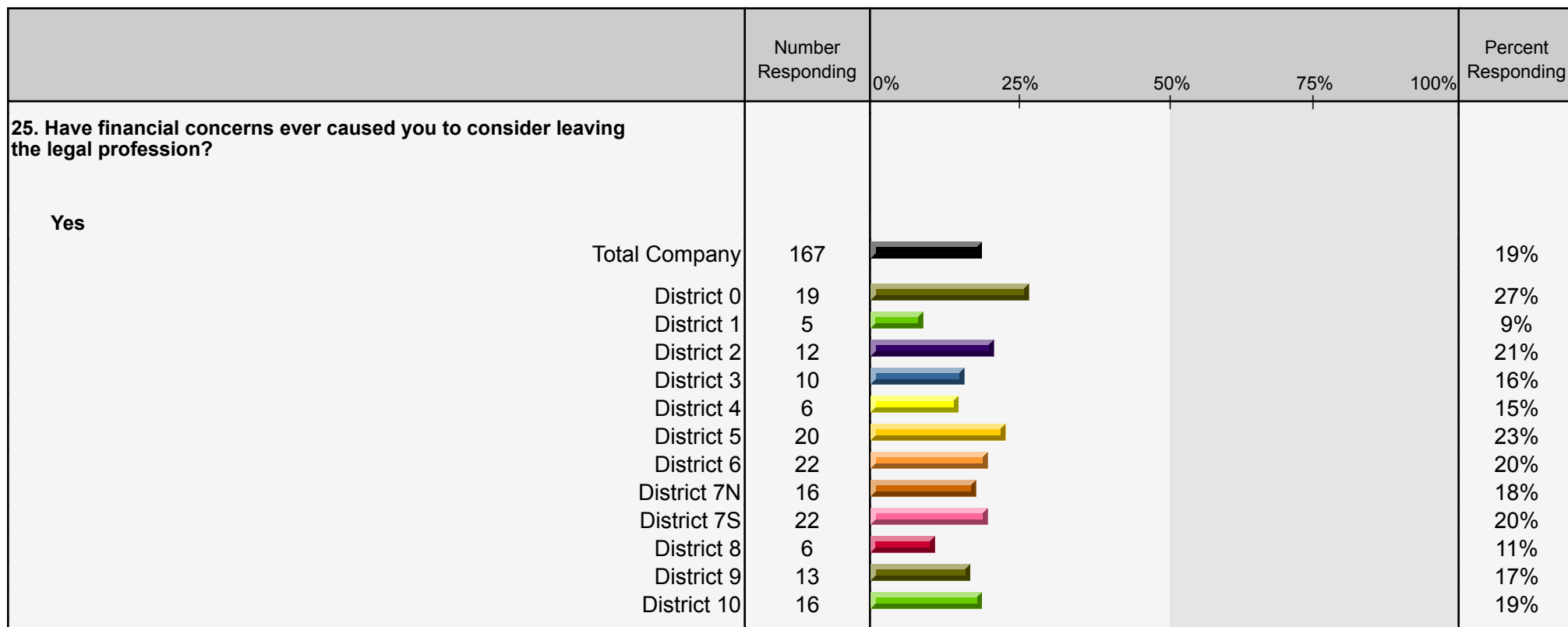
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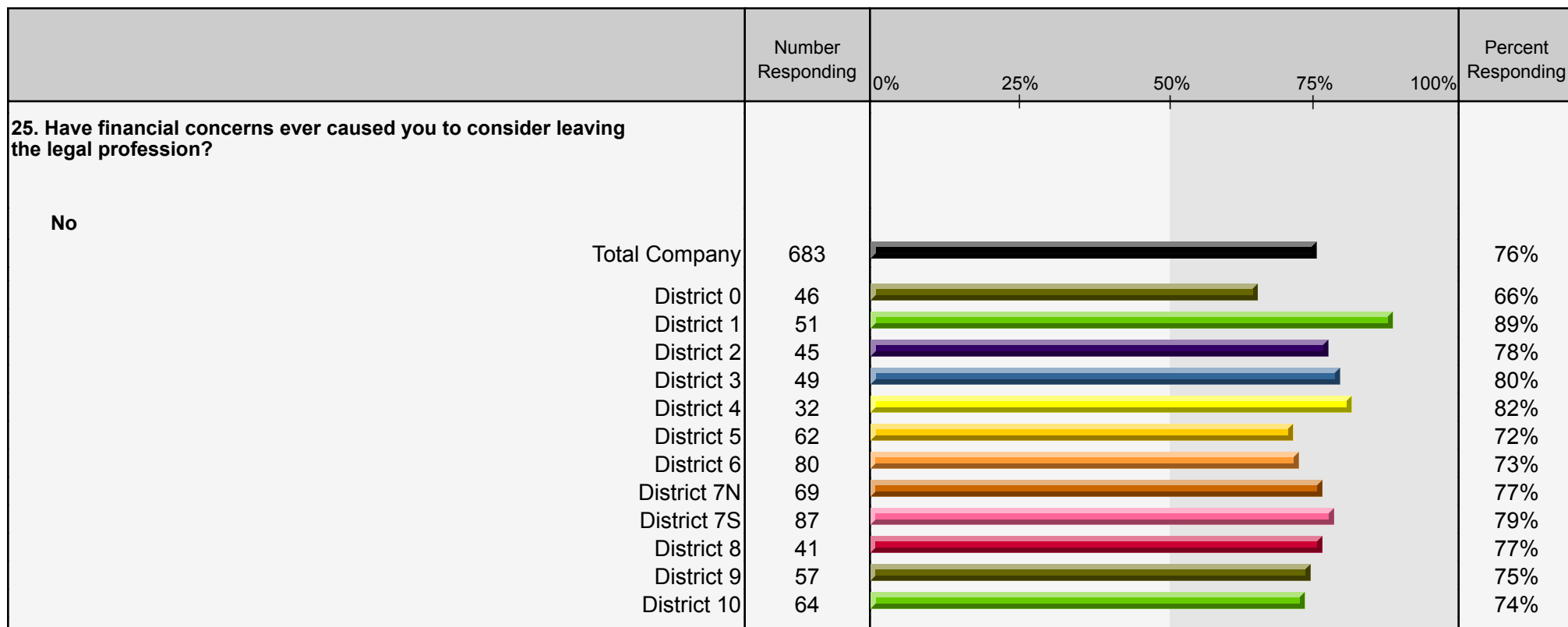
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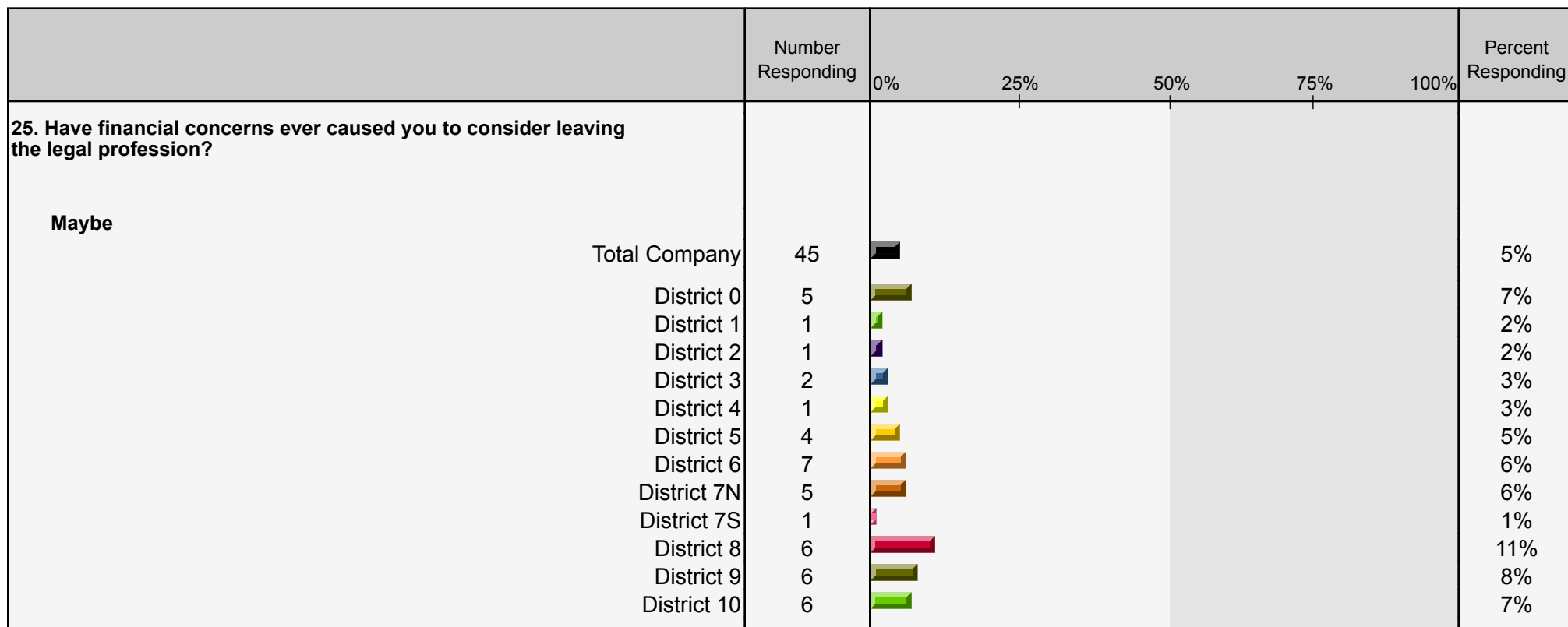
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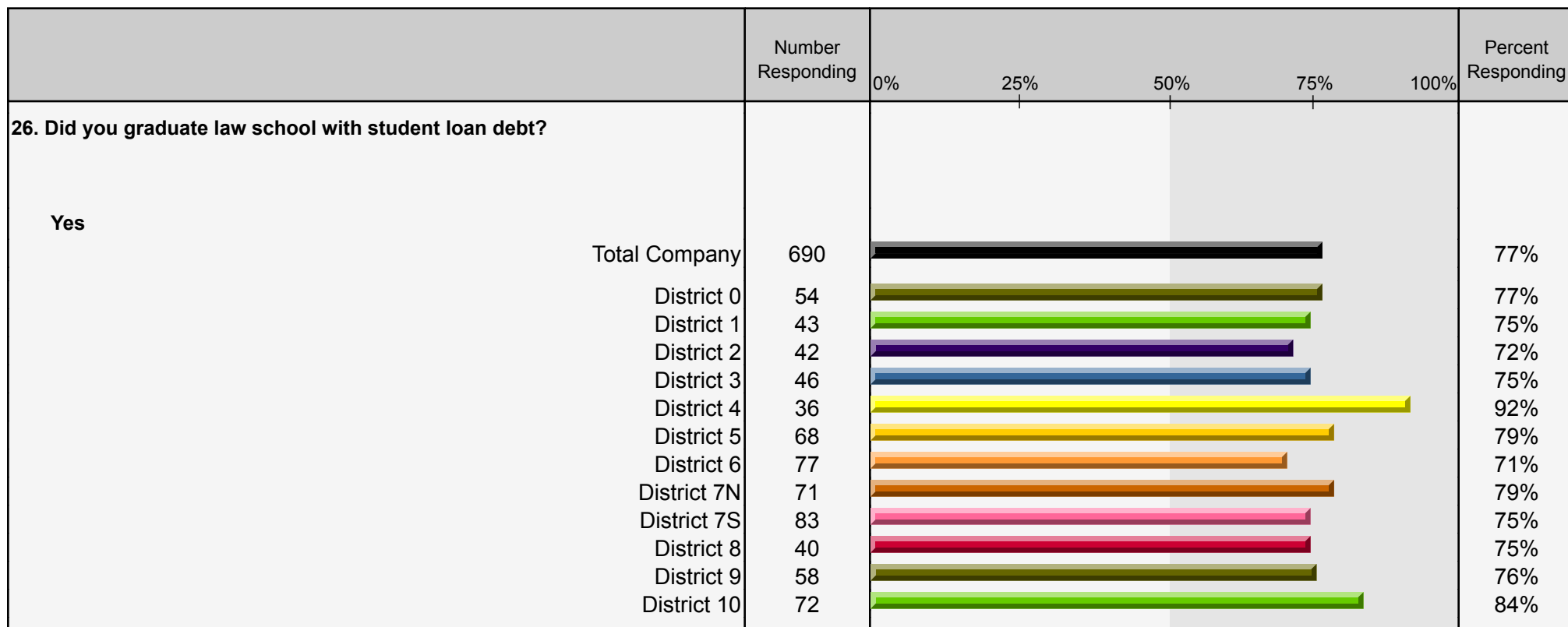
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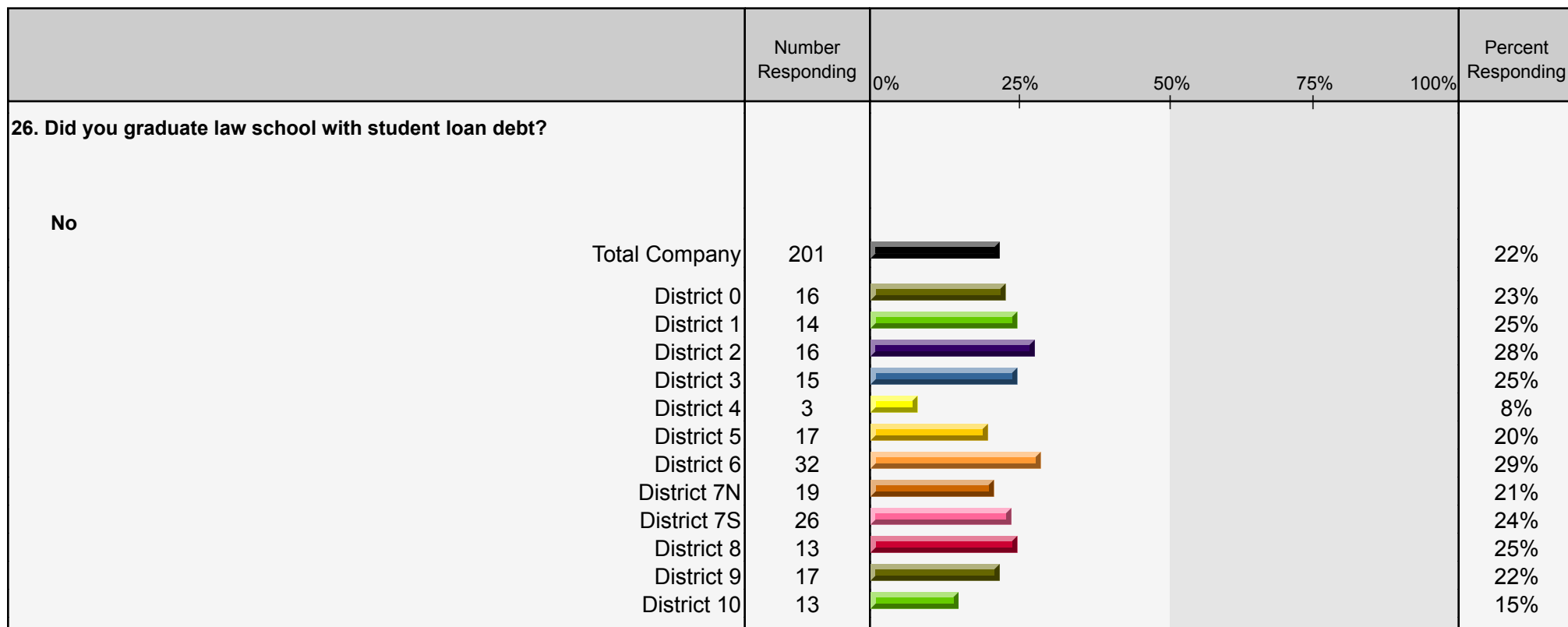
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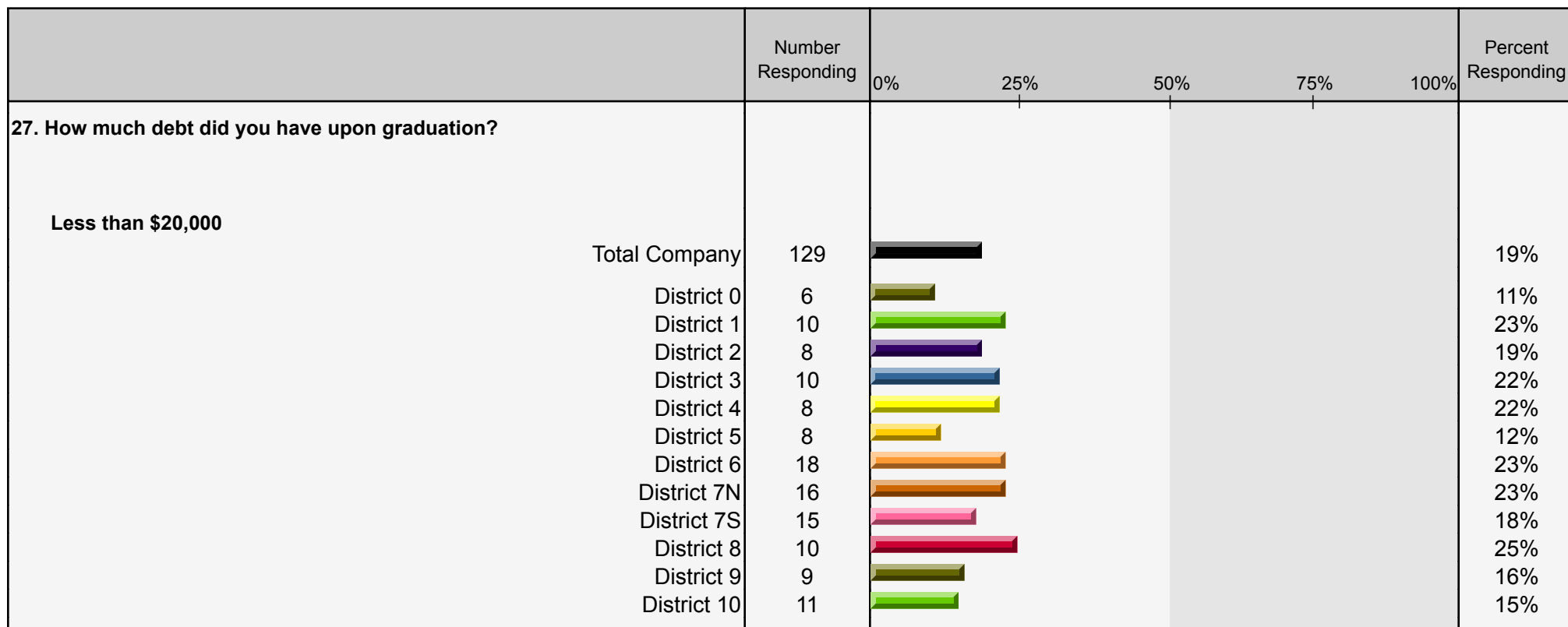
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	Number Responding	0%	25%	50%	75%	100%	Percent Responding
26. Did you graduate law school with student loan debt?							
Did not attend law school							
Total Company	4						0%
District 0	0	No valid cases					0%
District 1	0	No valid cases					0%
District 2	0	No valid cases					0%
District 3	0	No valid cases					0%
District 4	0	No valid cases					0%
District 5	1						1%
District 6	0	No valid cases					0%
District 7N	0	No valid cases					0%
District 7S	1						1%
District 8	0	No valid cases					0%
District 9	1						1%
District 10	1						1%

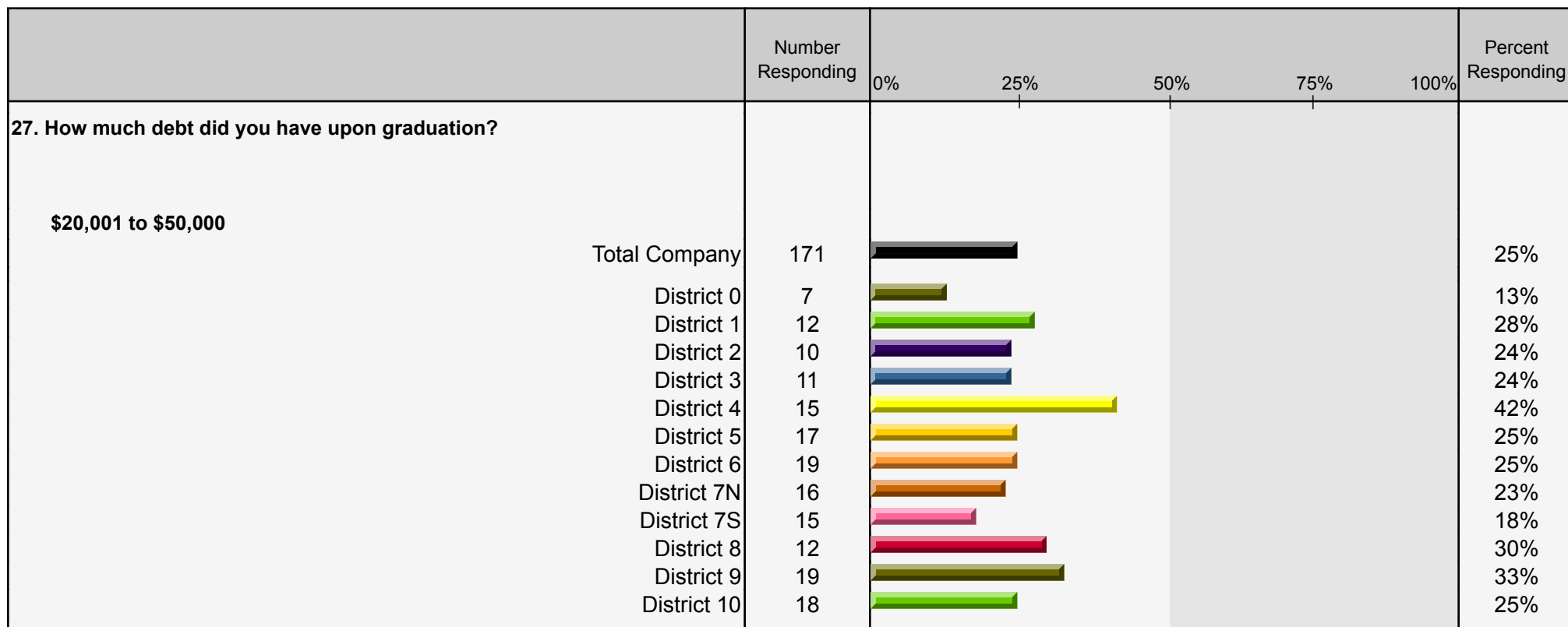
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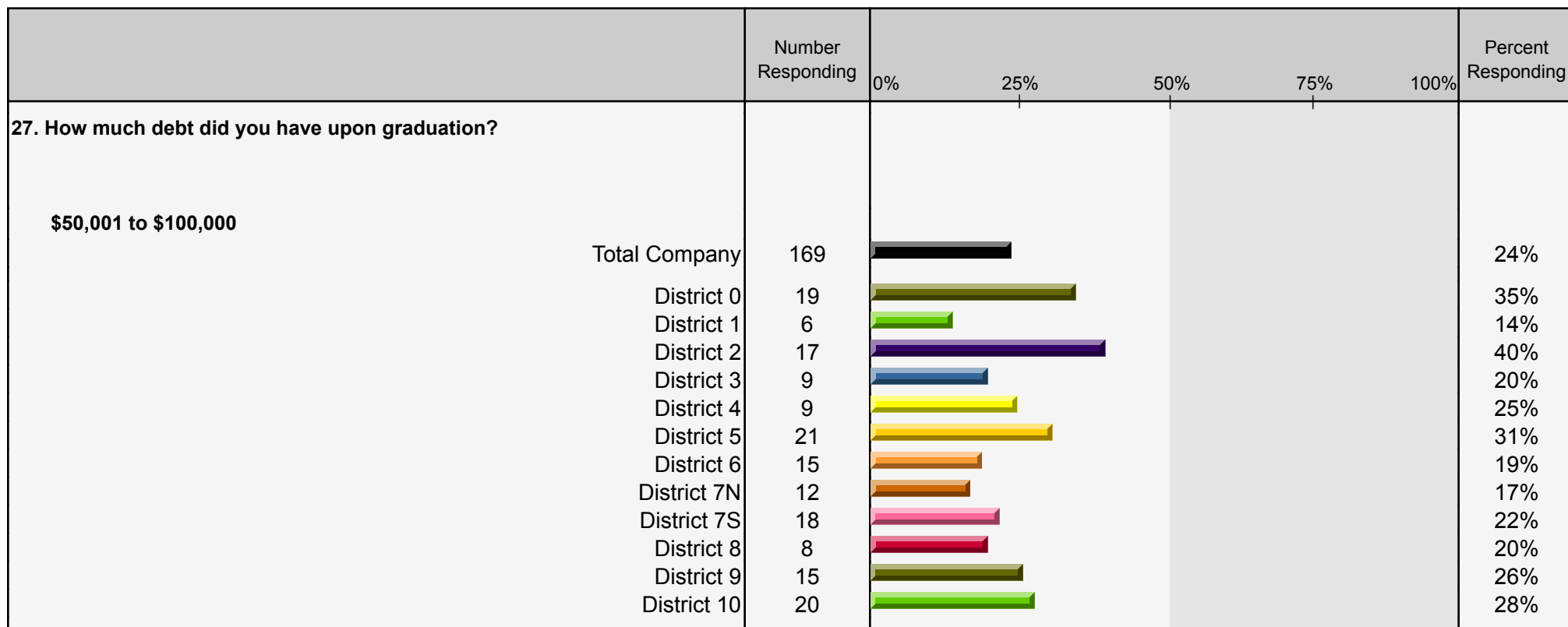
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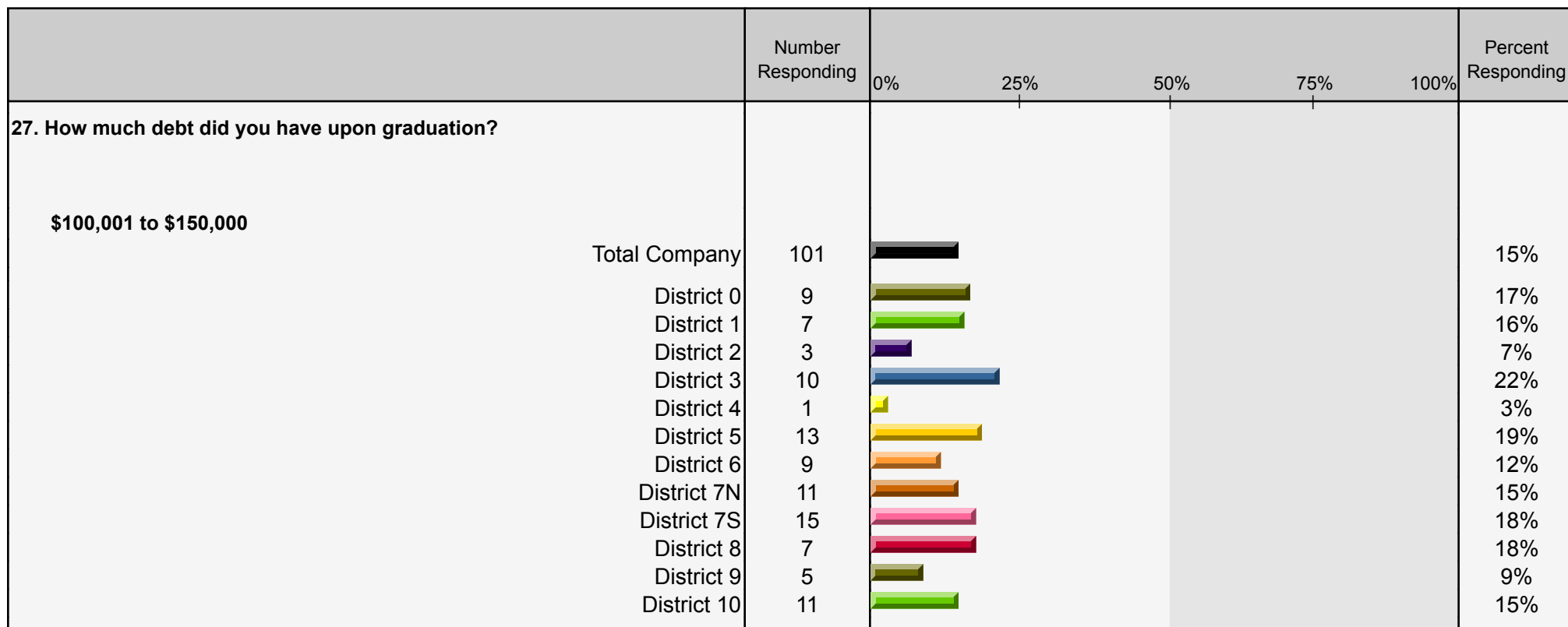
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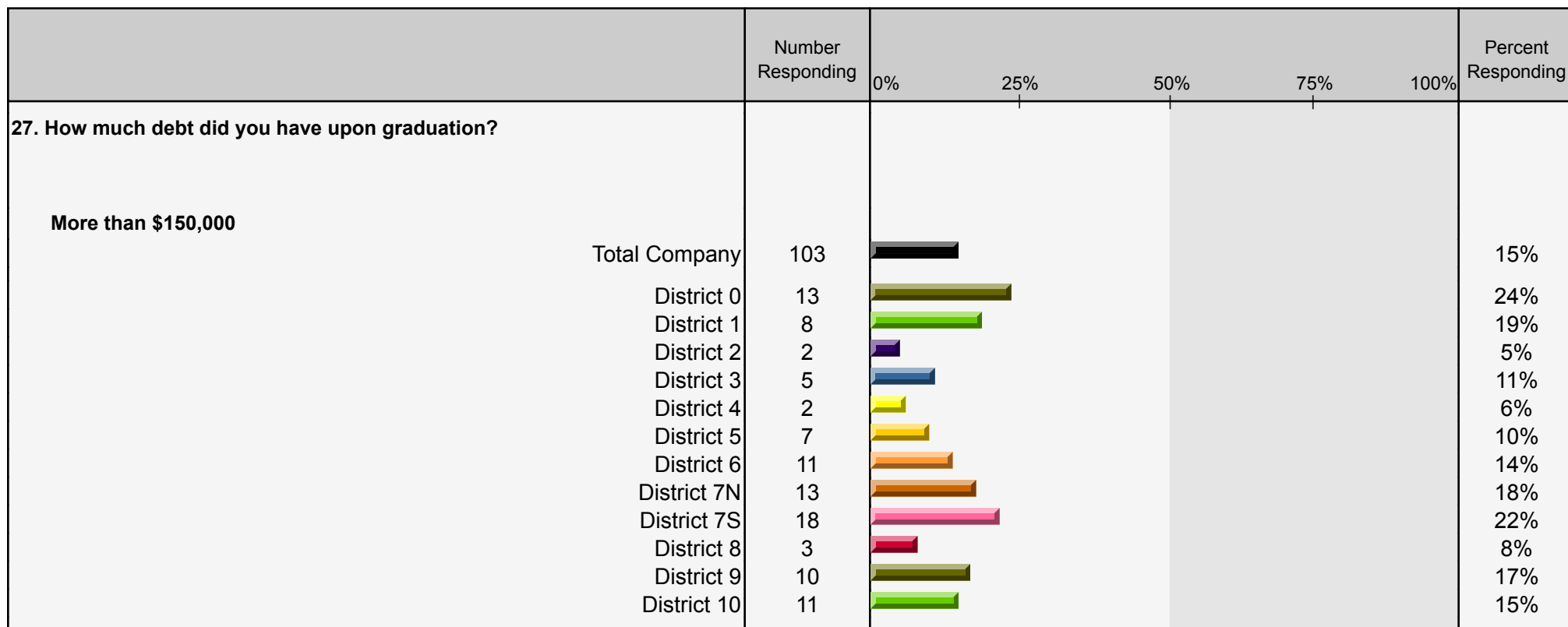
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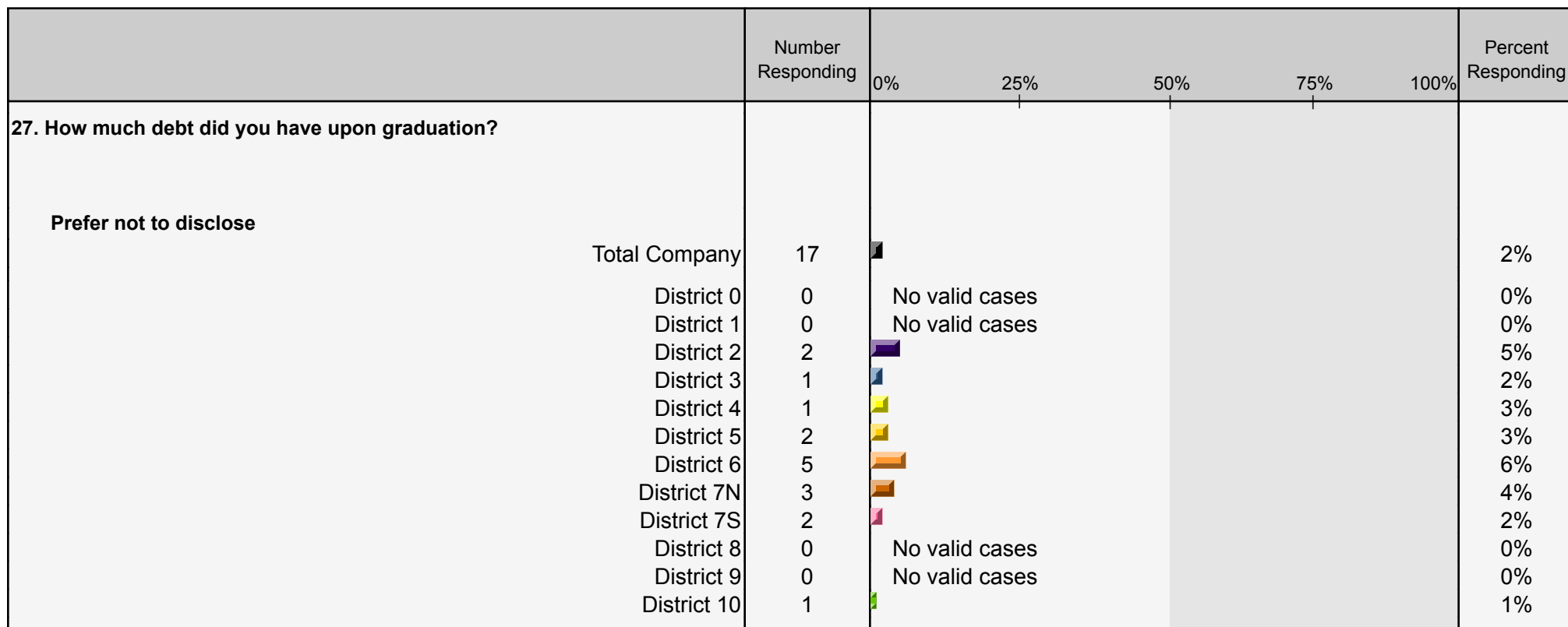
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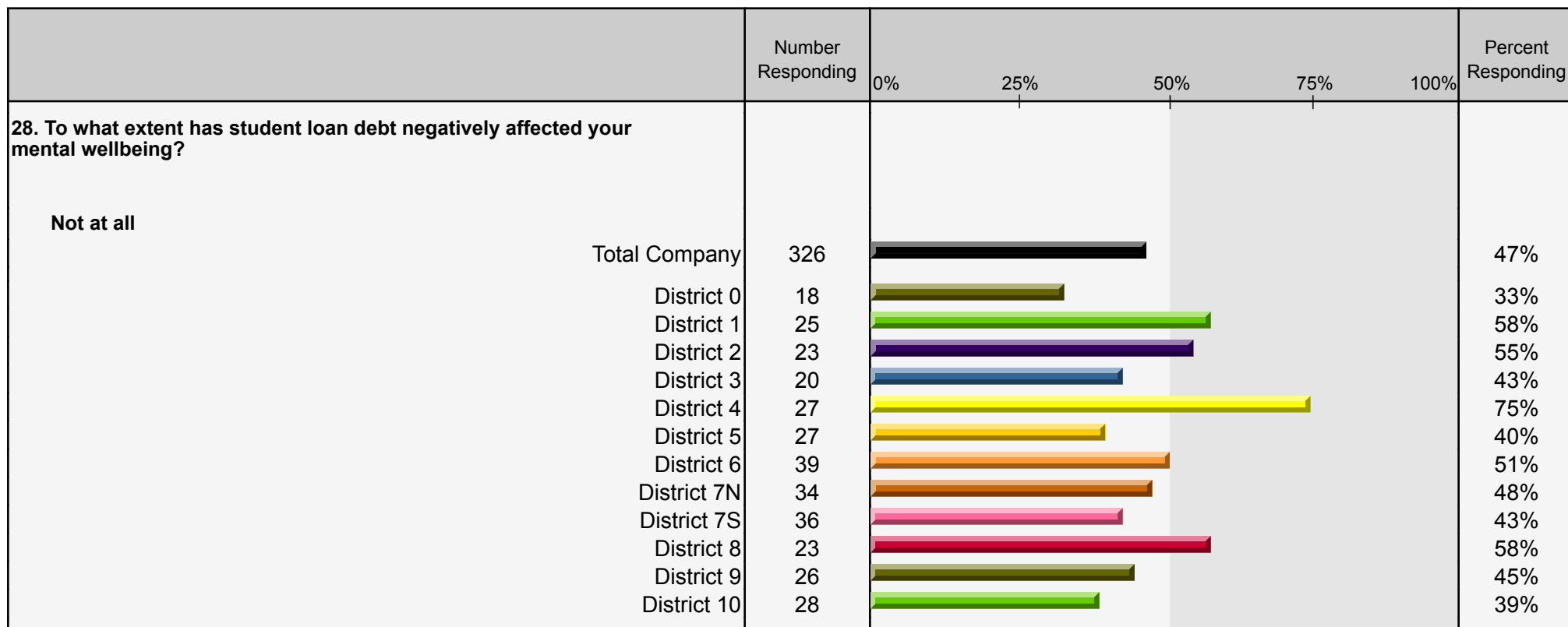
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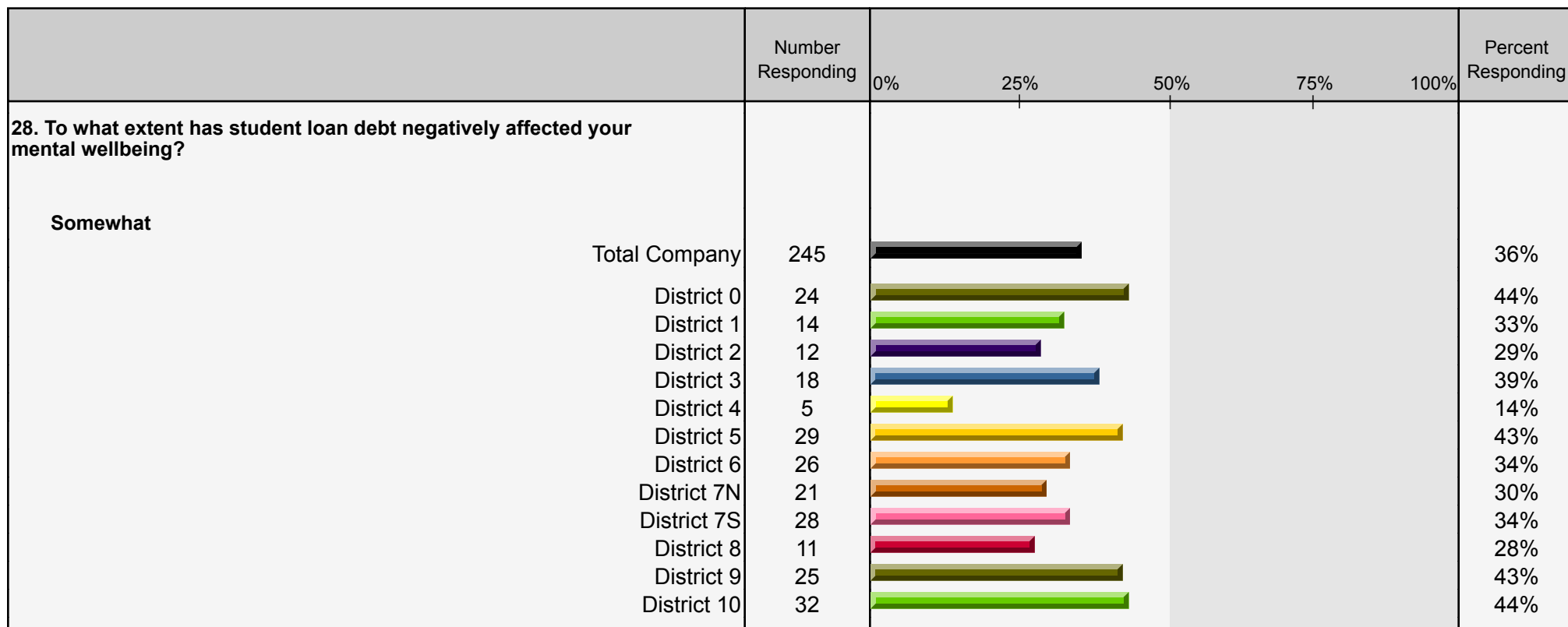
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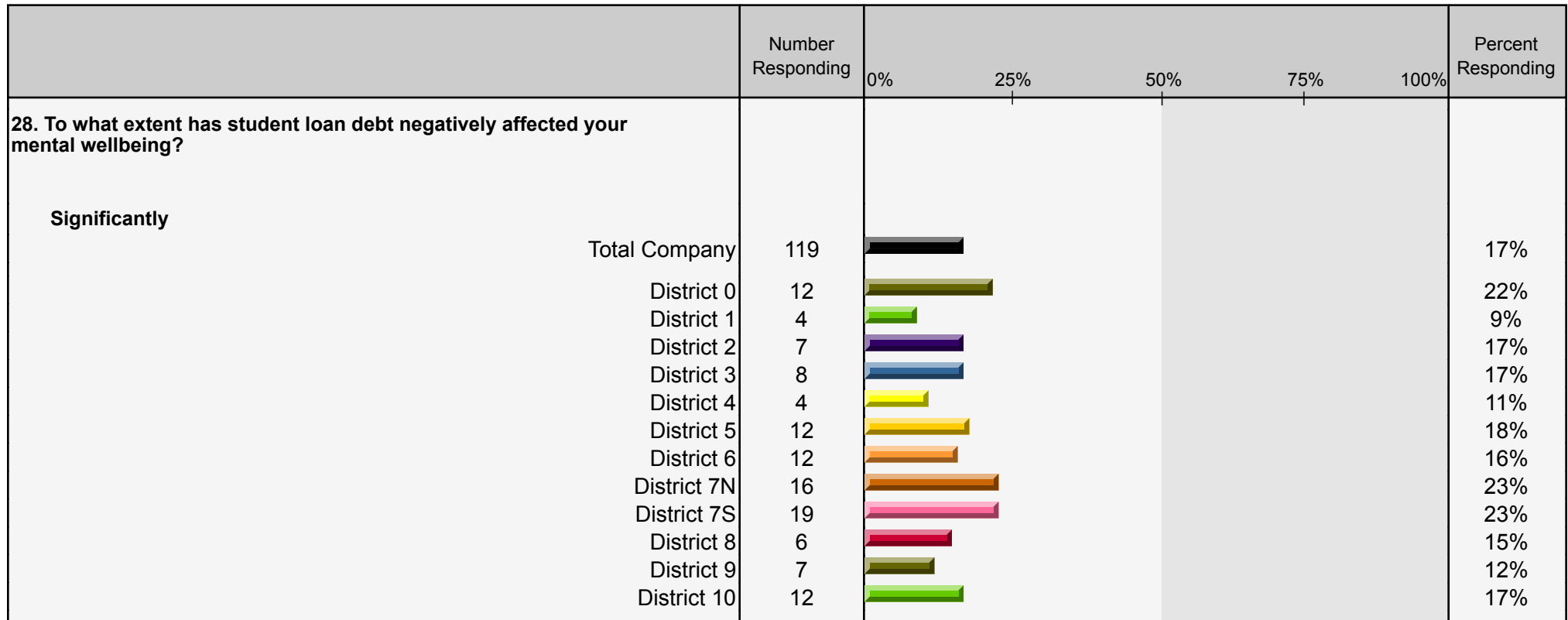
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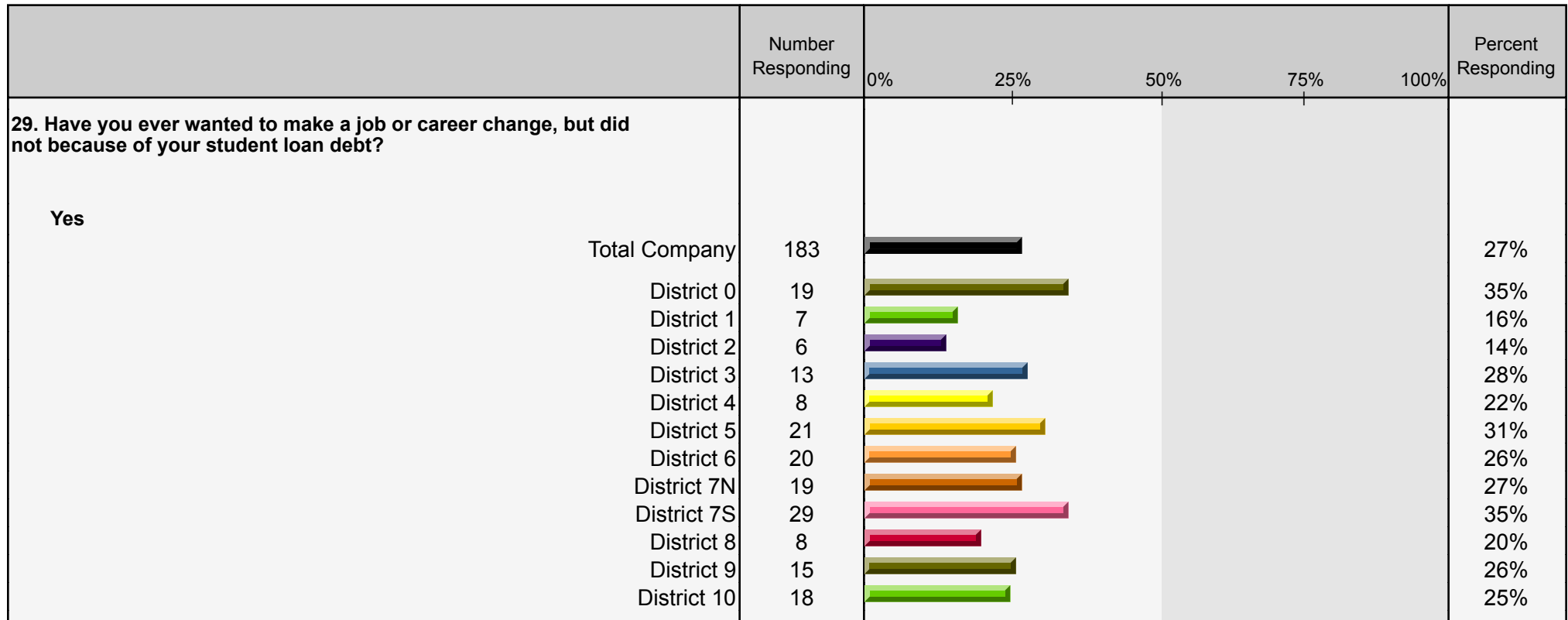
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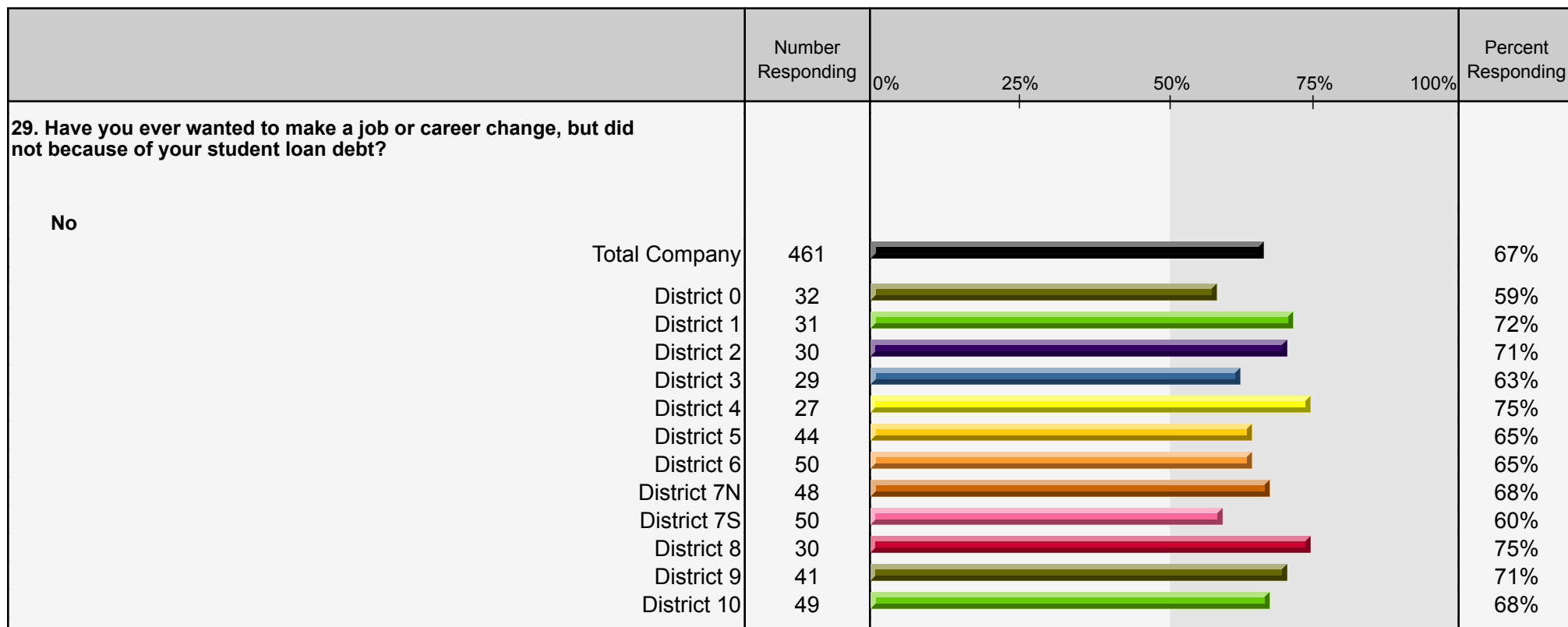
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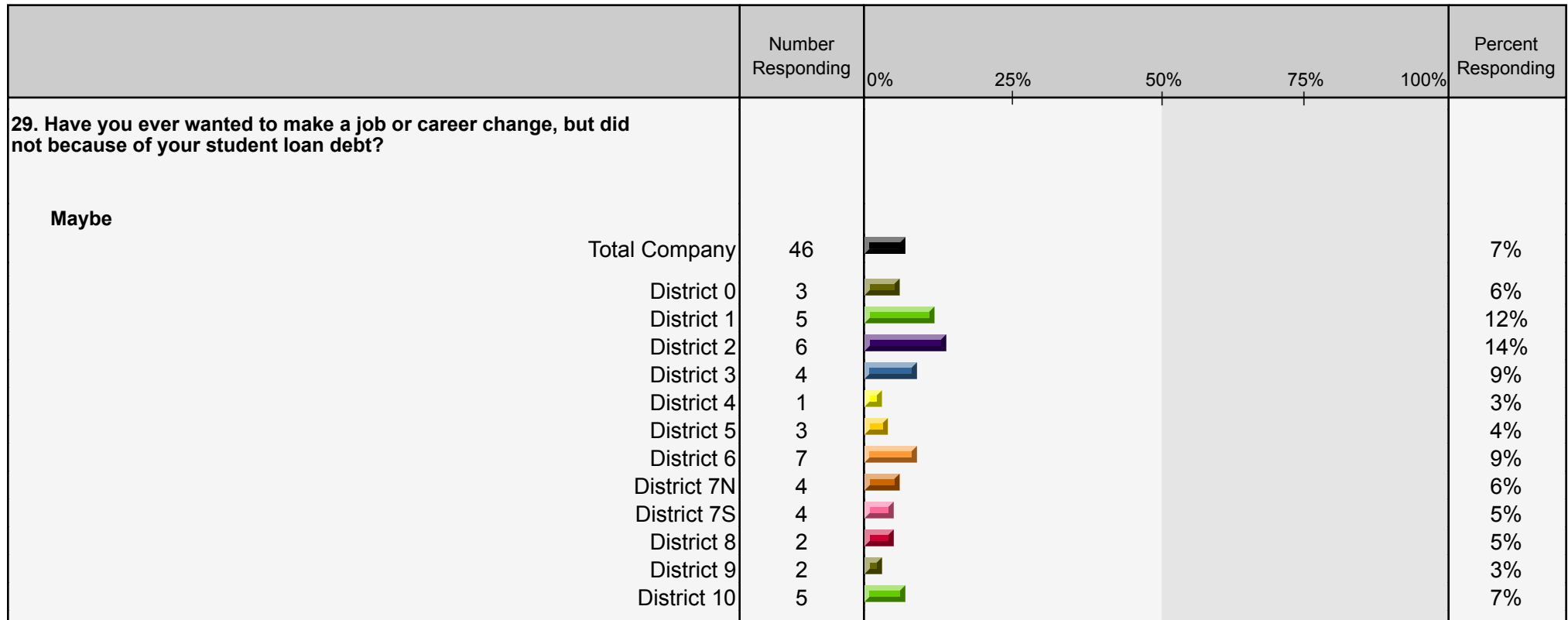
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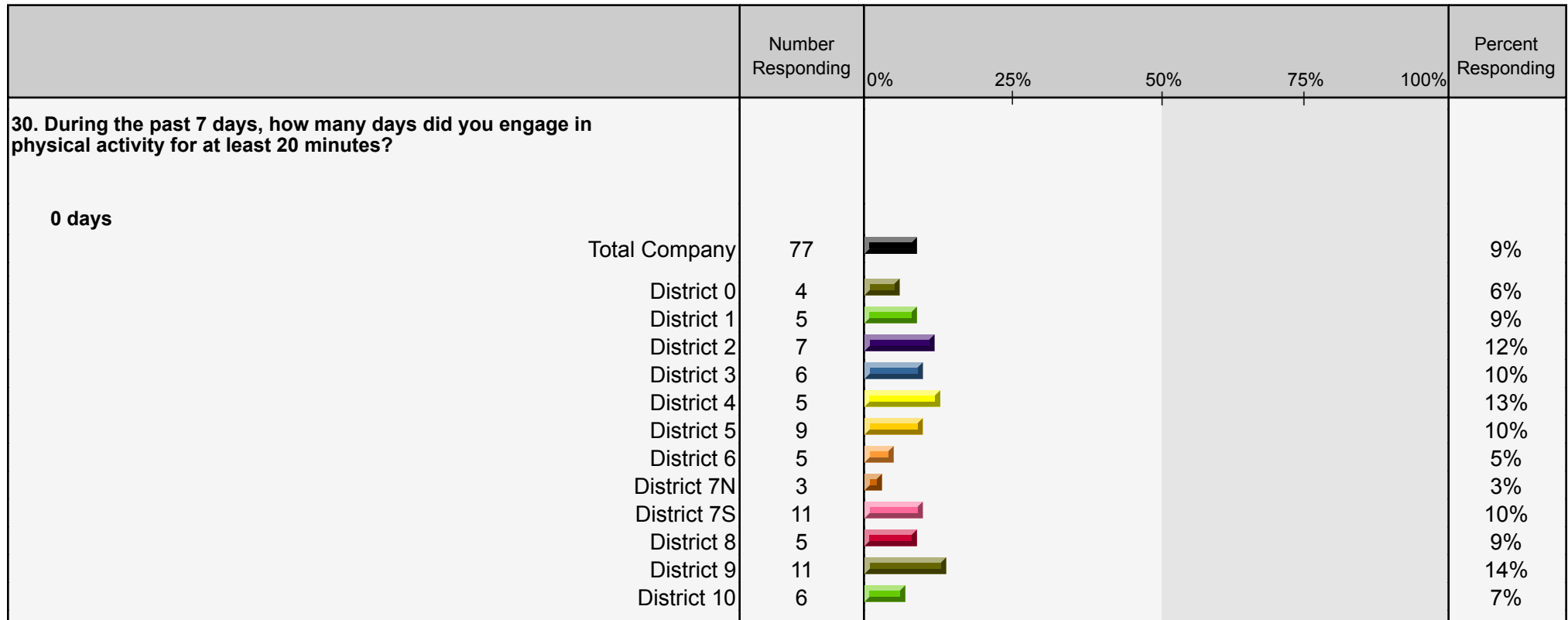
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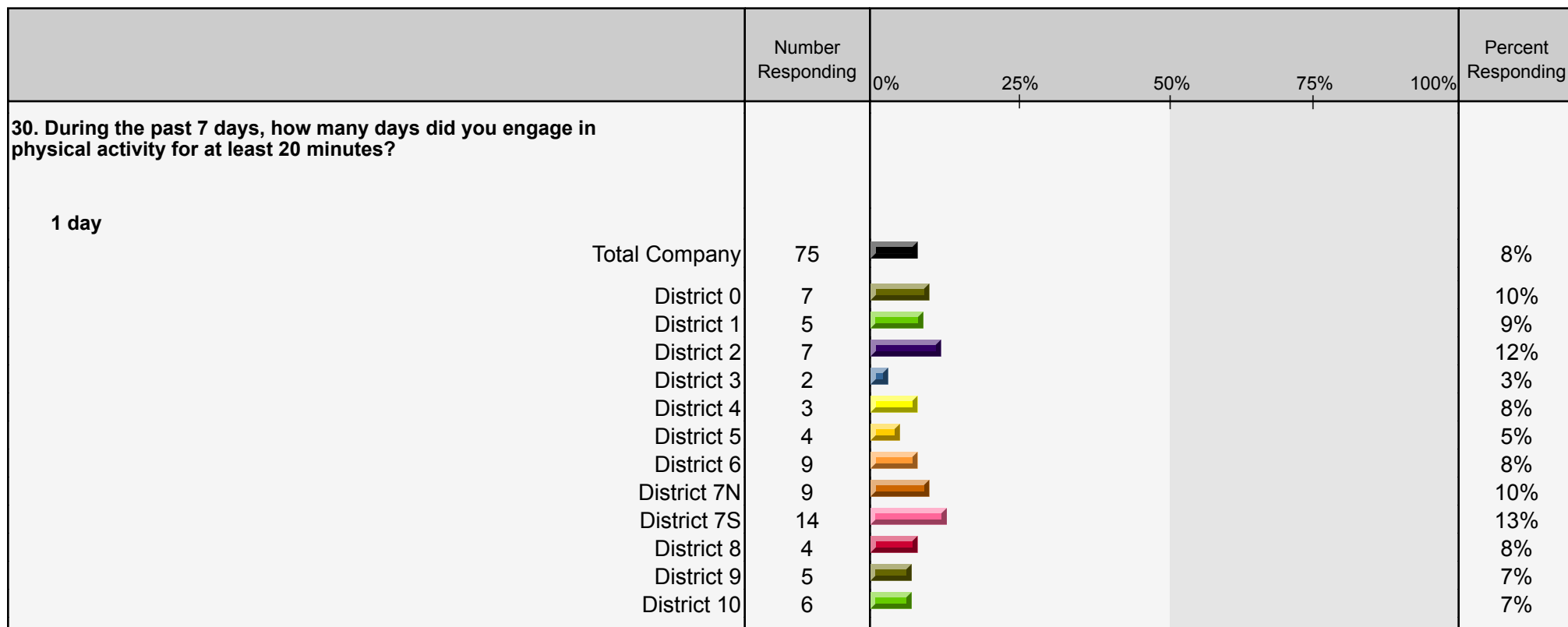
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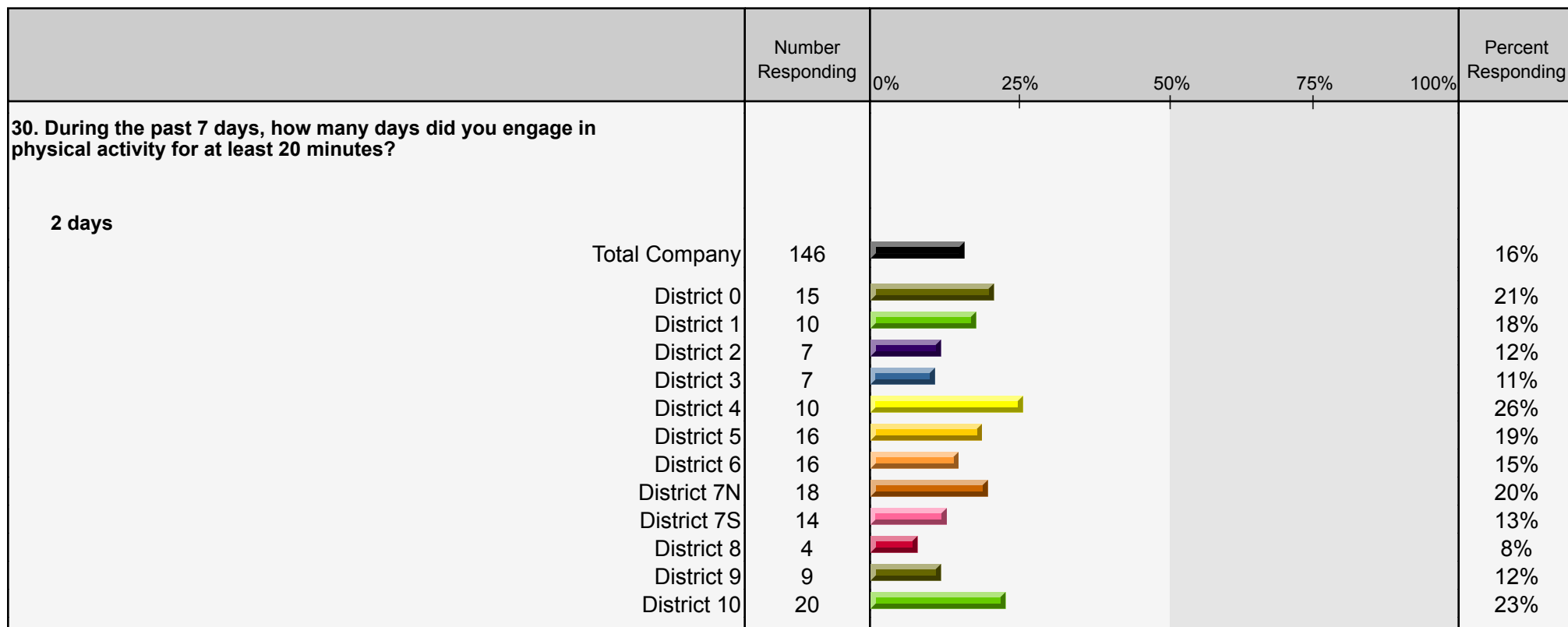
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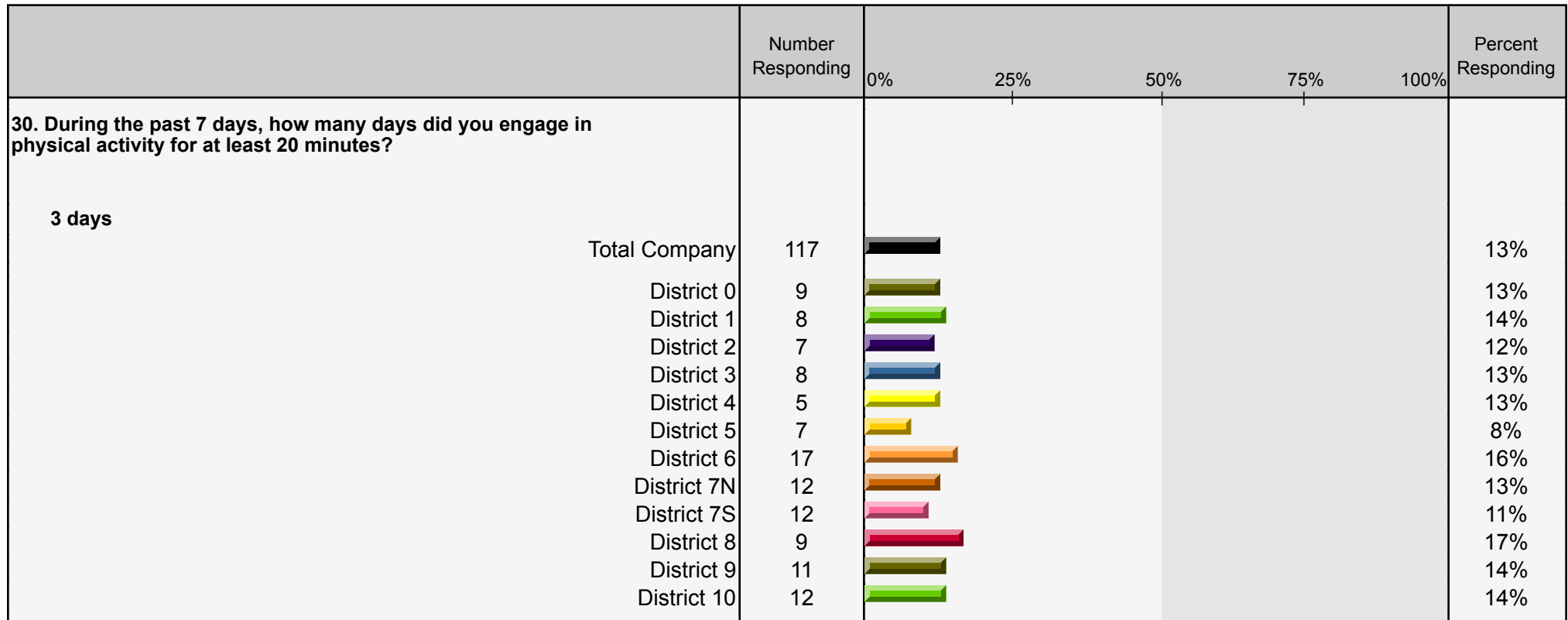
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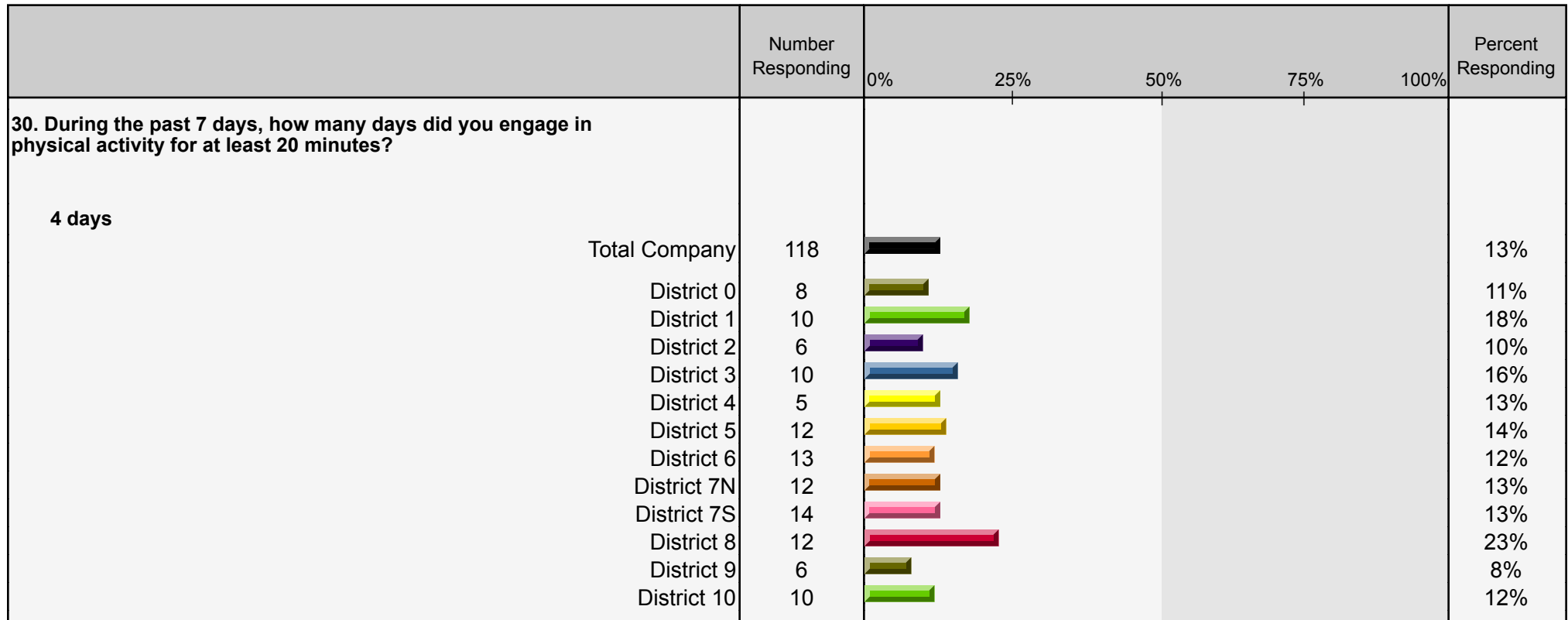
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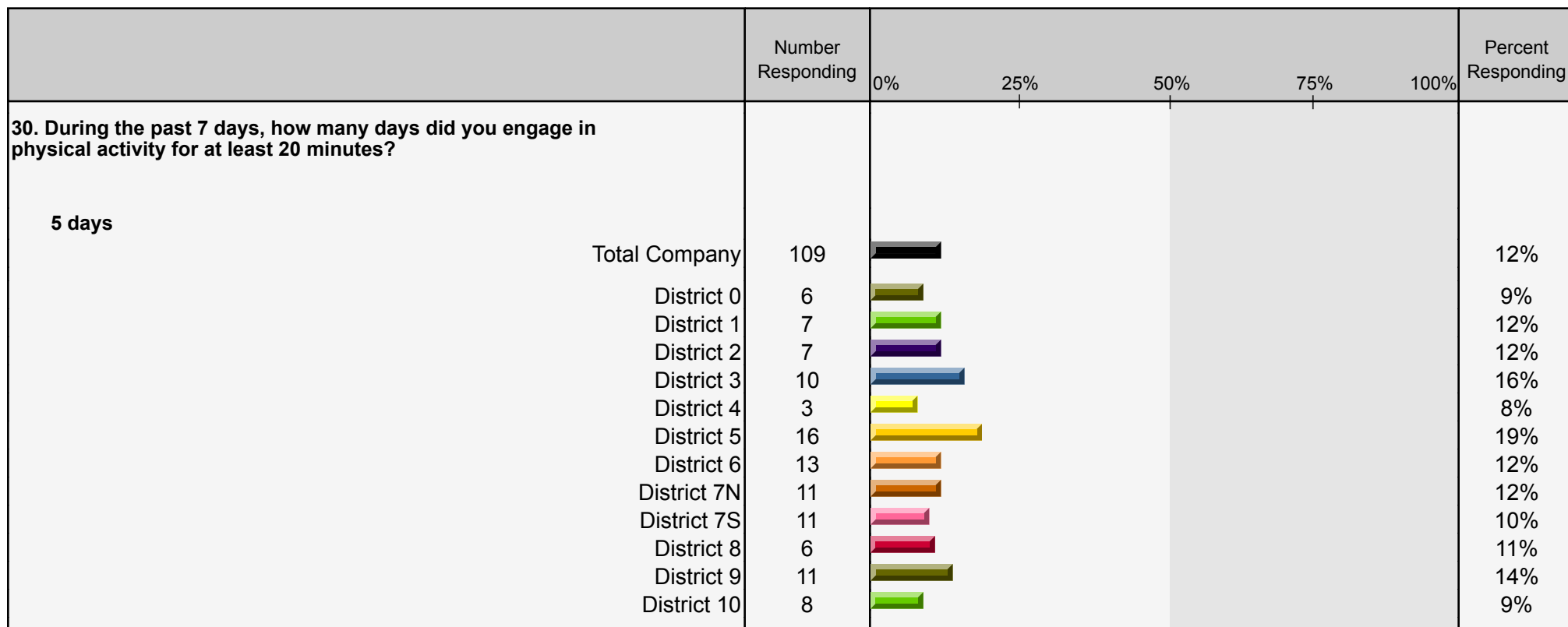
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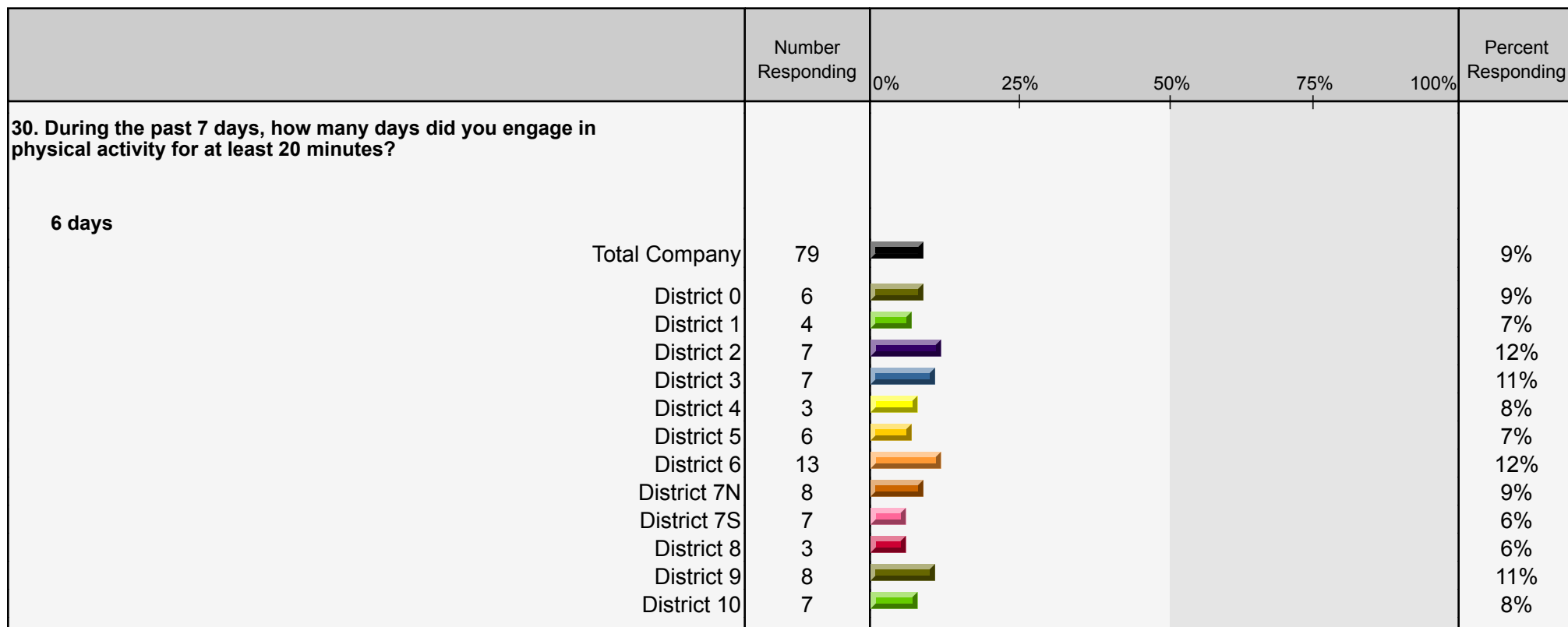
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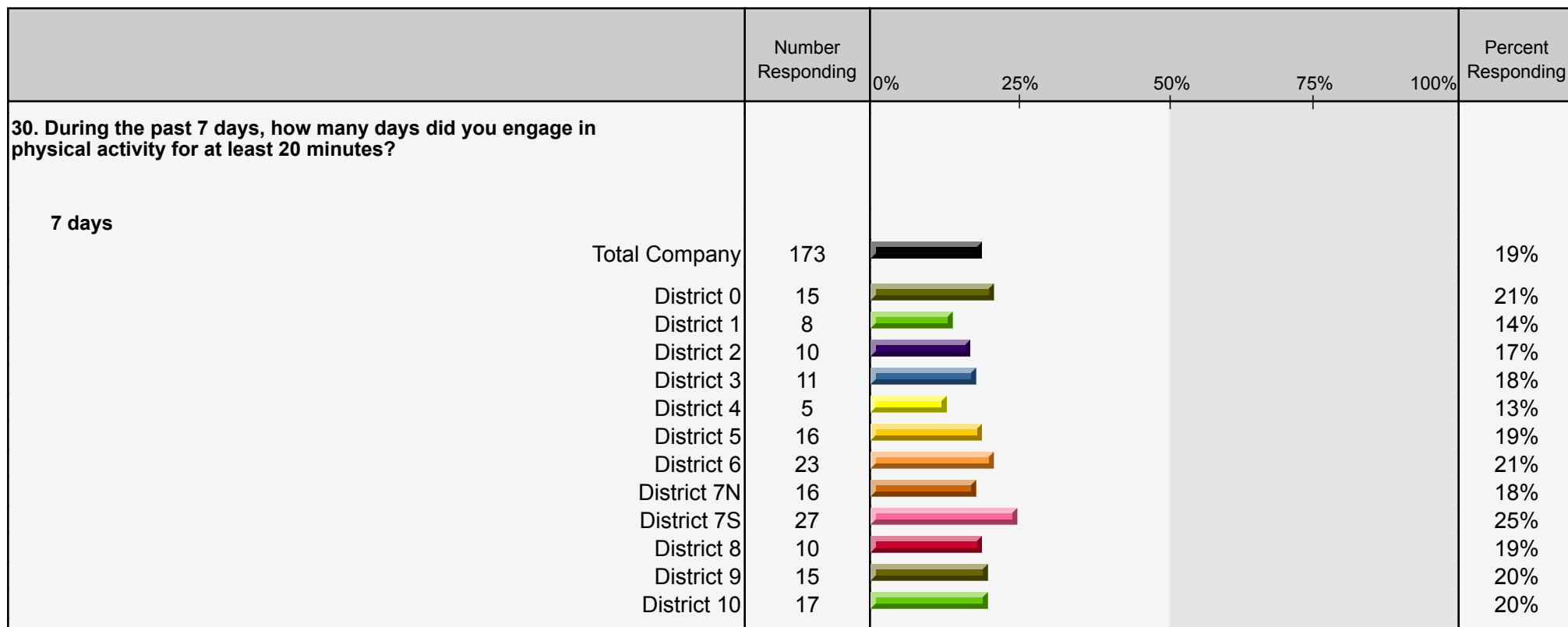
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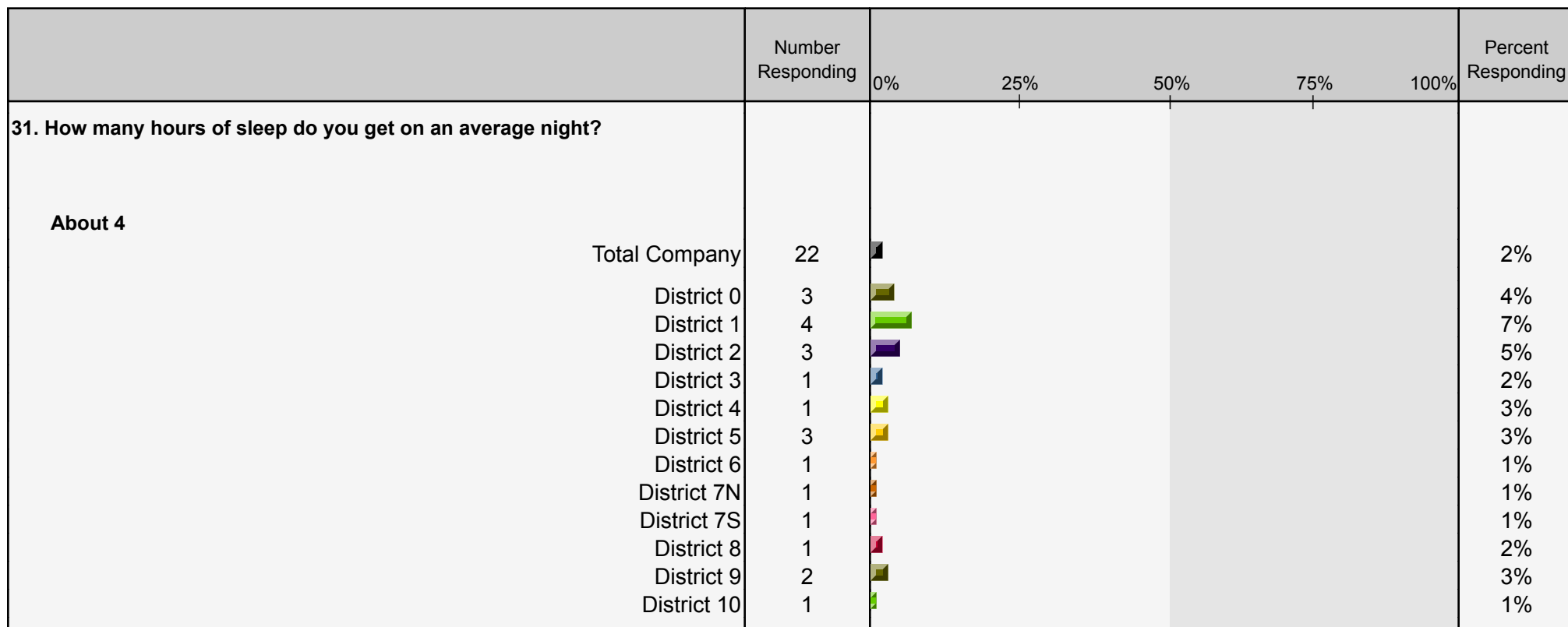
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		Number Responding	0%	25%	50%	75%	100%	Percent Responding
31. How many hours of sleep do you get on an average night?								
Less than 4								
	Total Company	0	No valid cases					0%
	District 0	0	No valid cases					0%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	0	No valid cases					0%
	District 4	0	No valid cases					0%
	District 5	0	No valid cases					0%
	District 6	0	No valid cases					0%
	District 7N	0	No valid cases					0%
	District 7S	0	No valid cases					0%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	0	No valid cases					0%

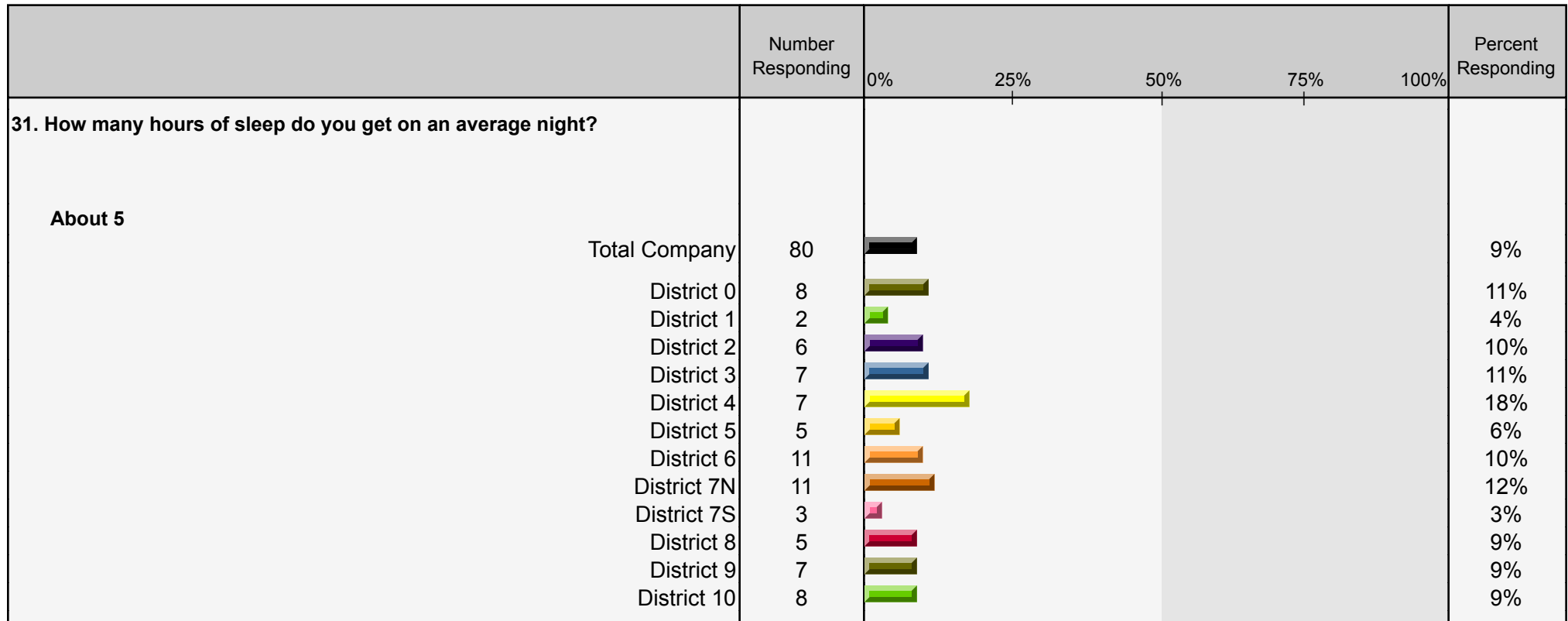
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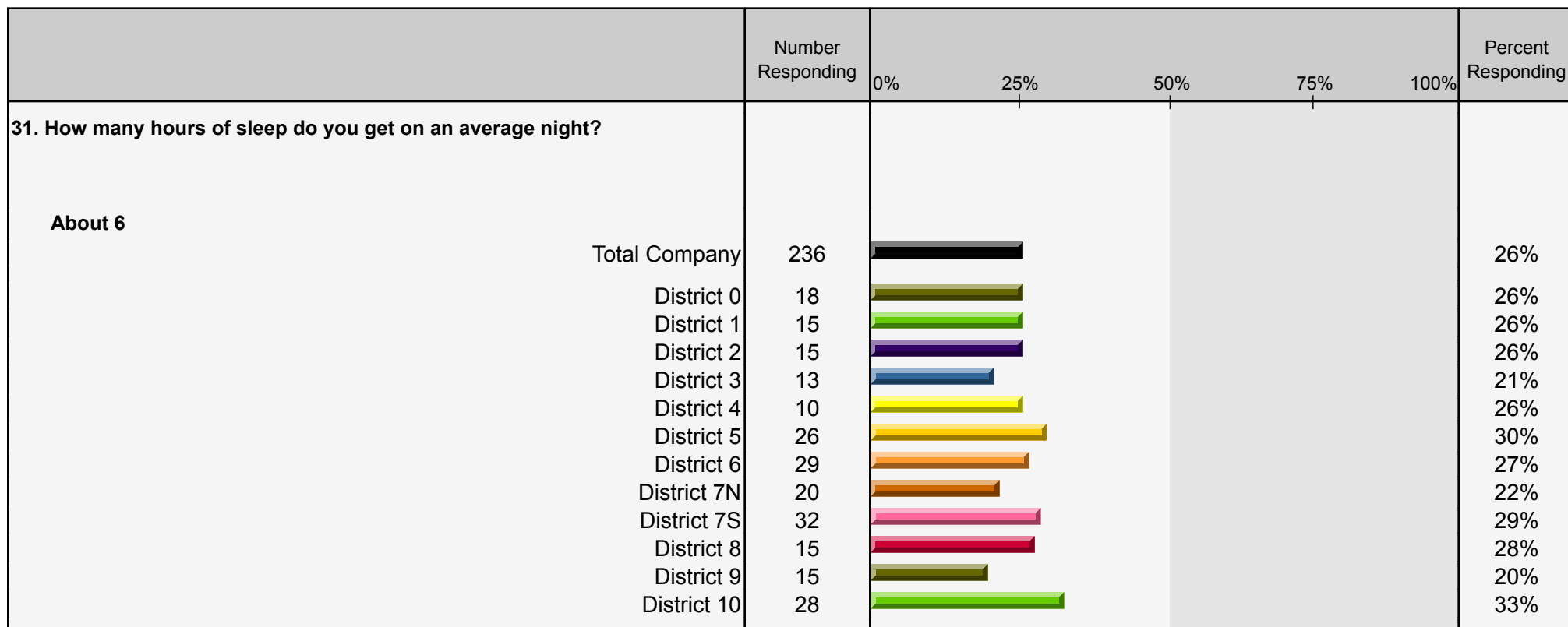
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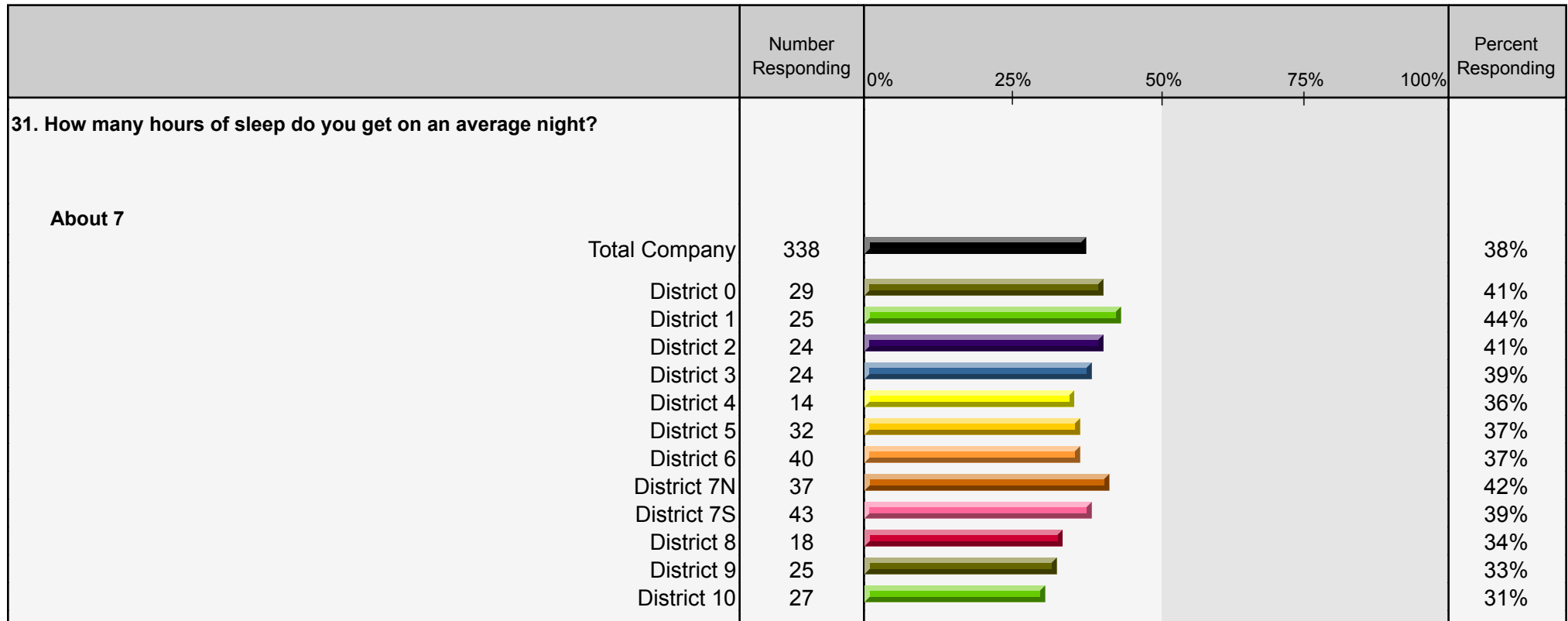
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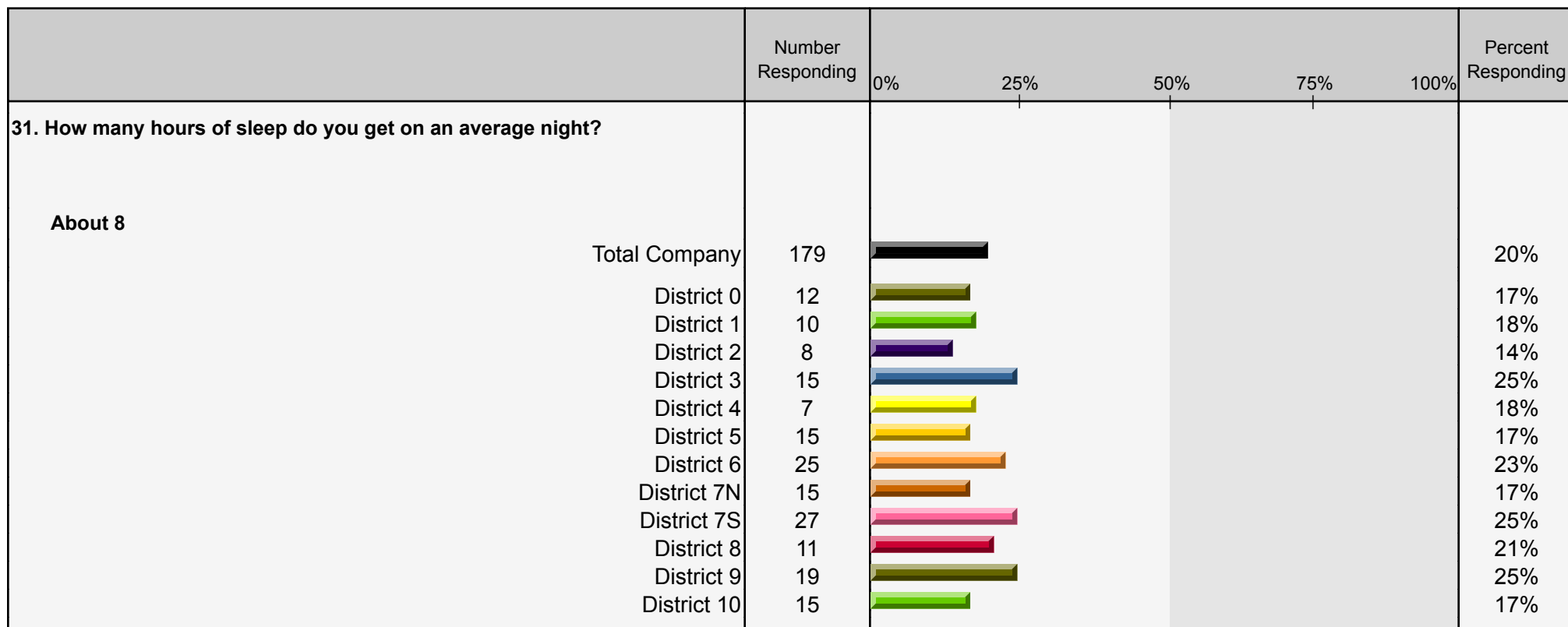
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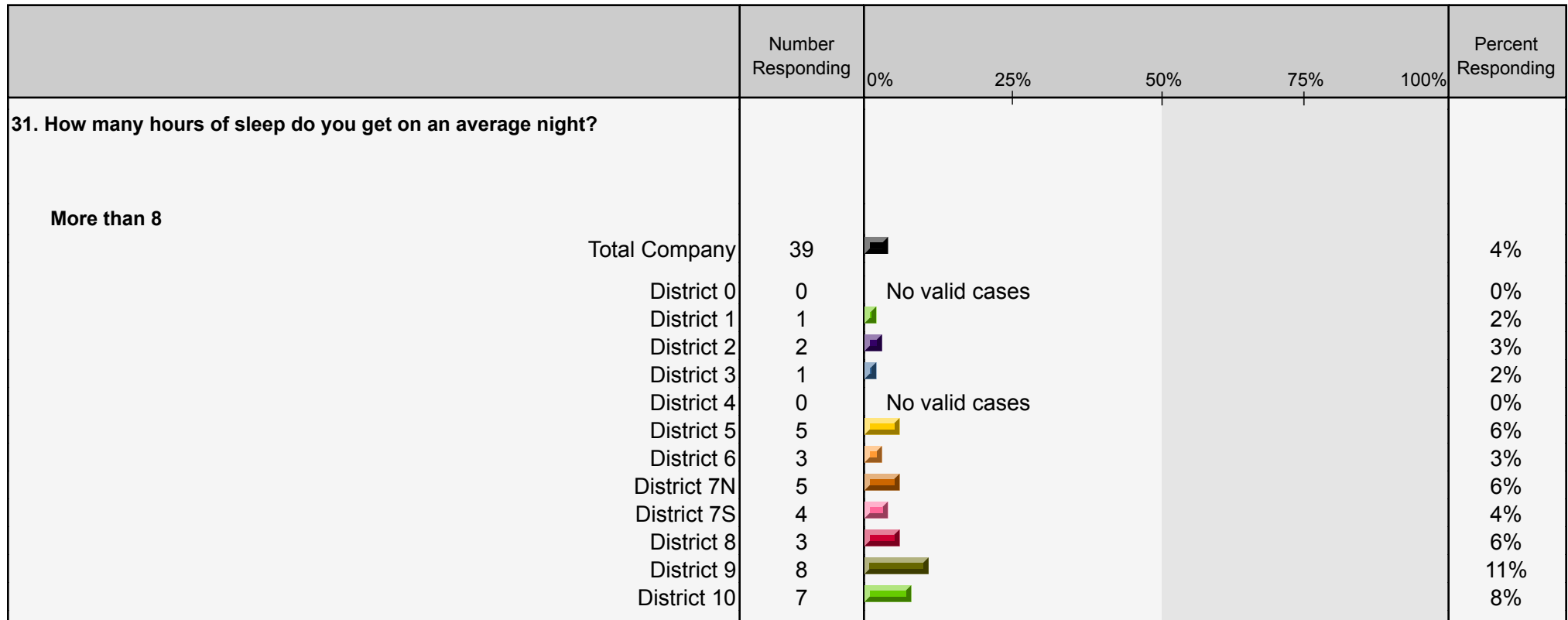
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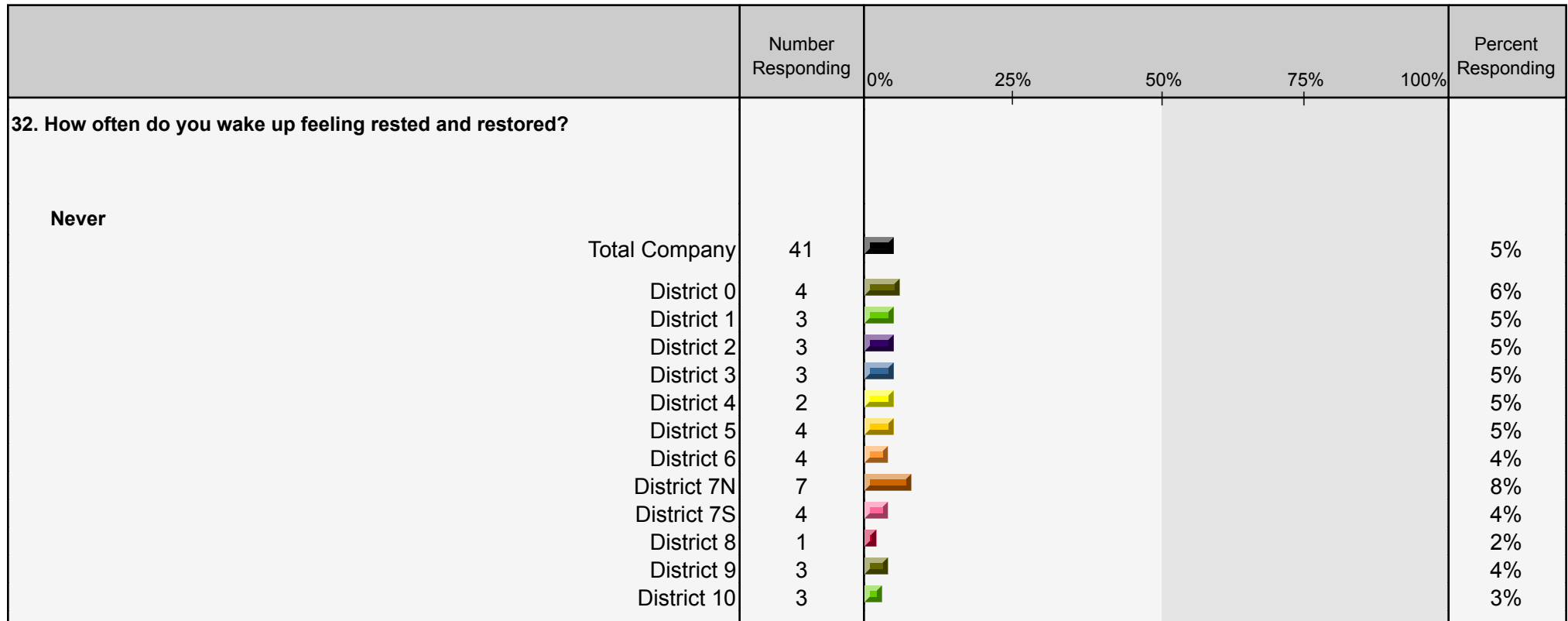
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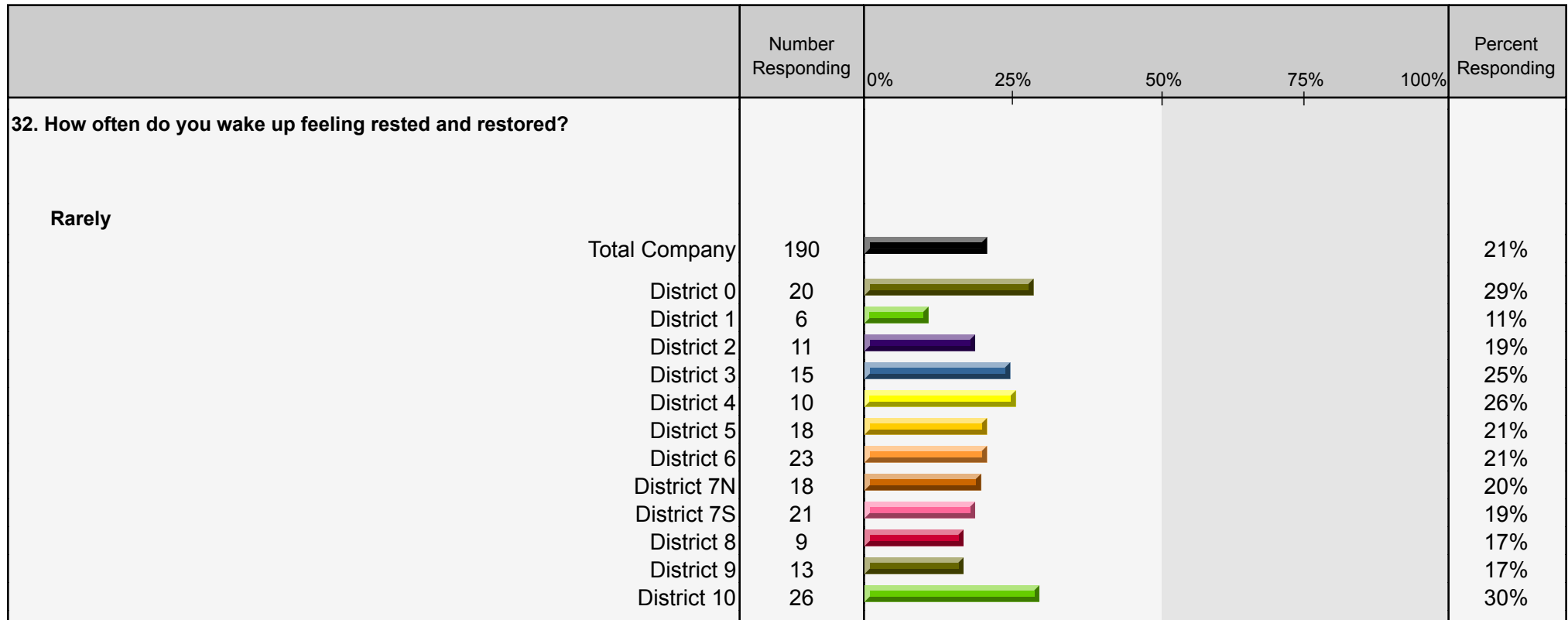
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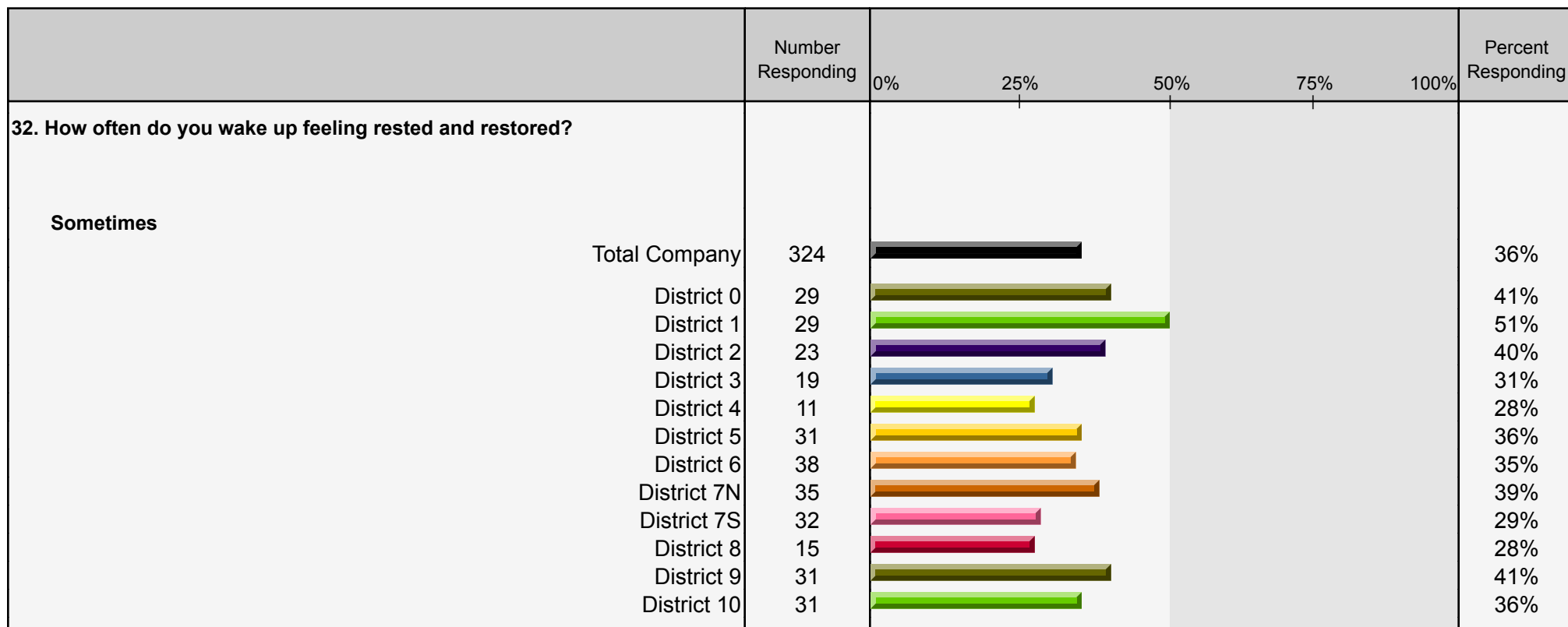
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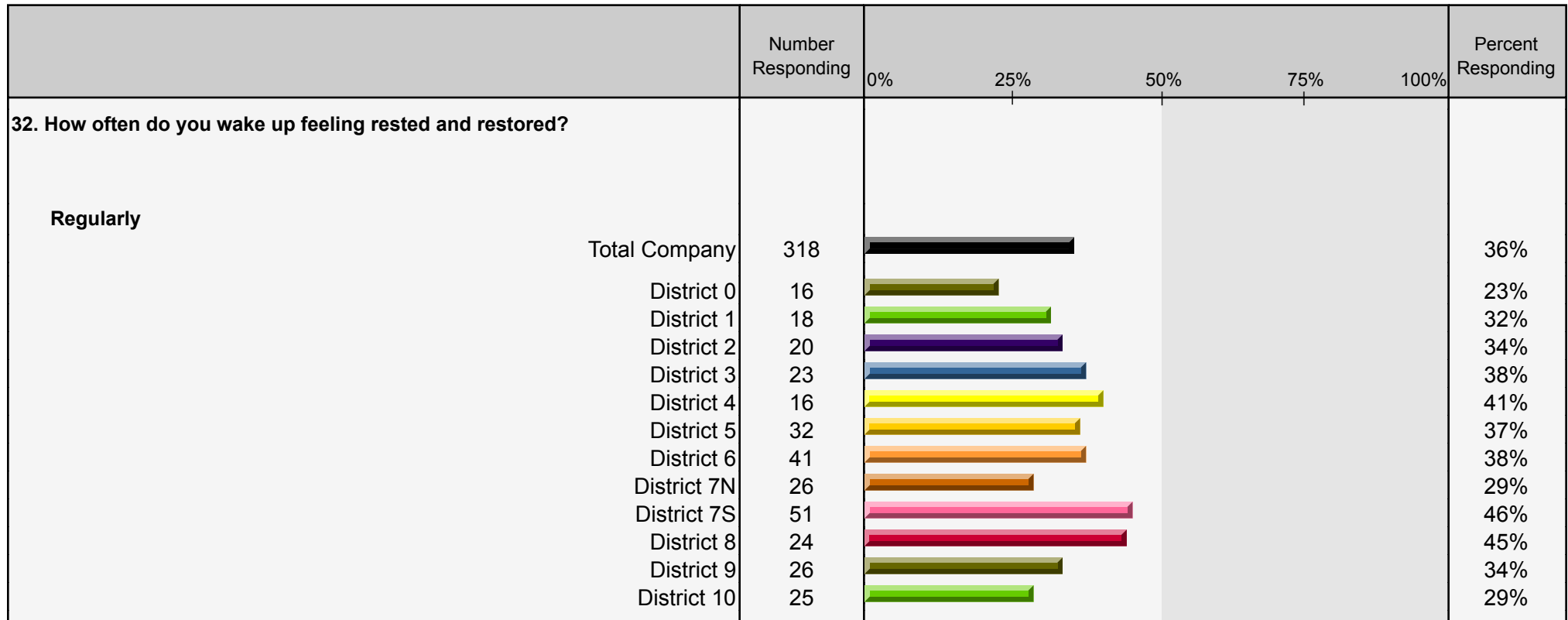
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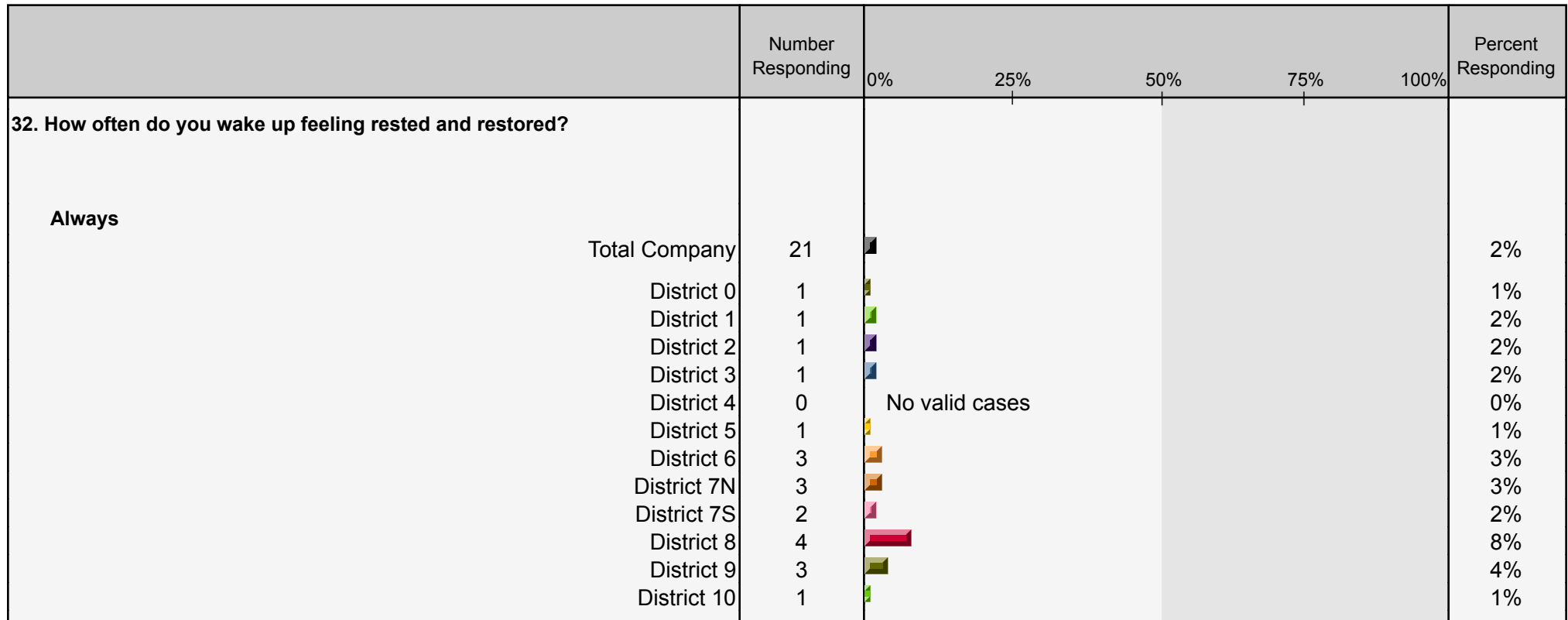
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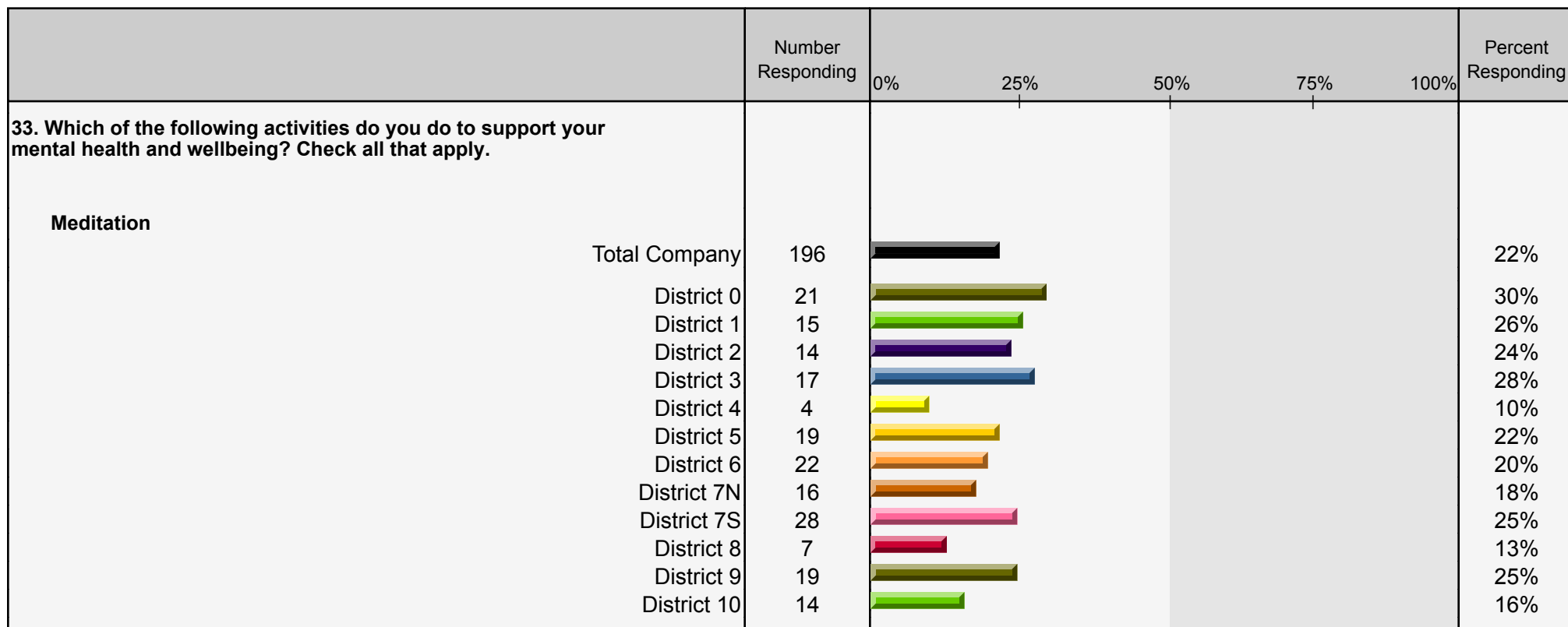
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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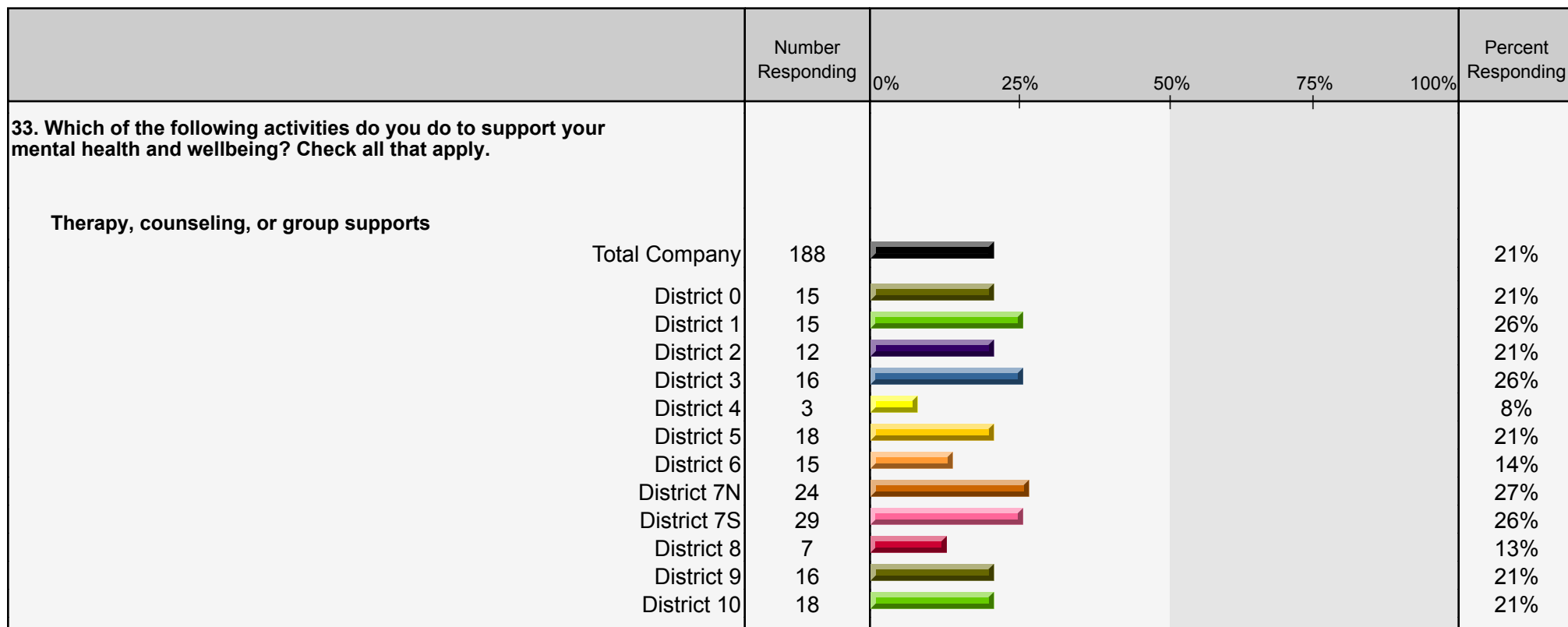
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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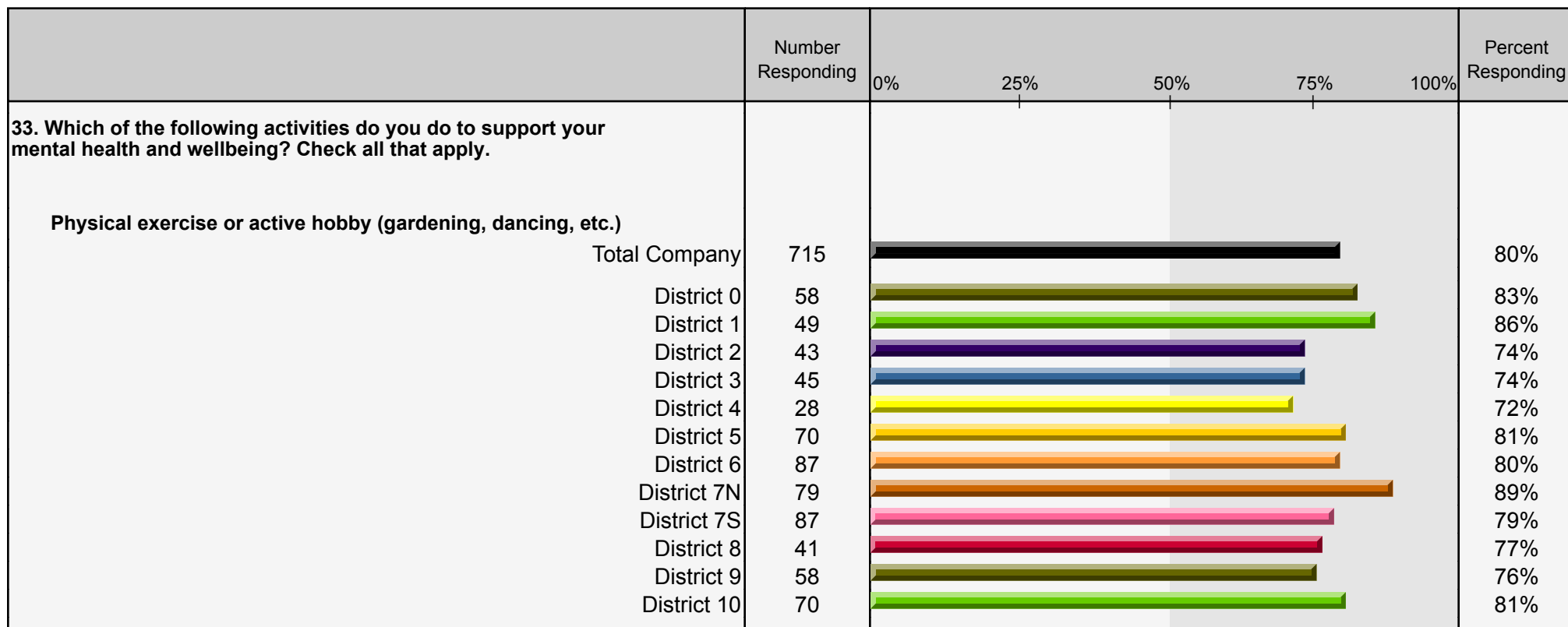
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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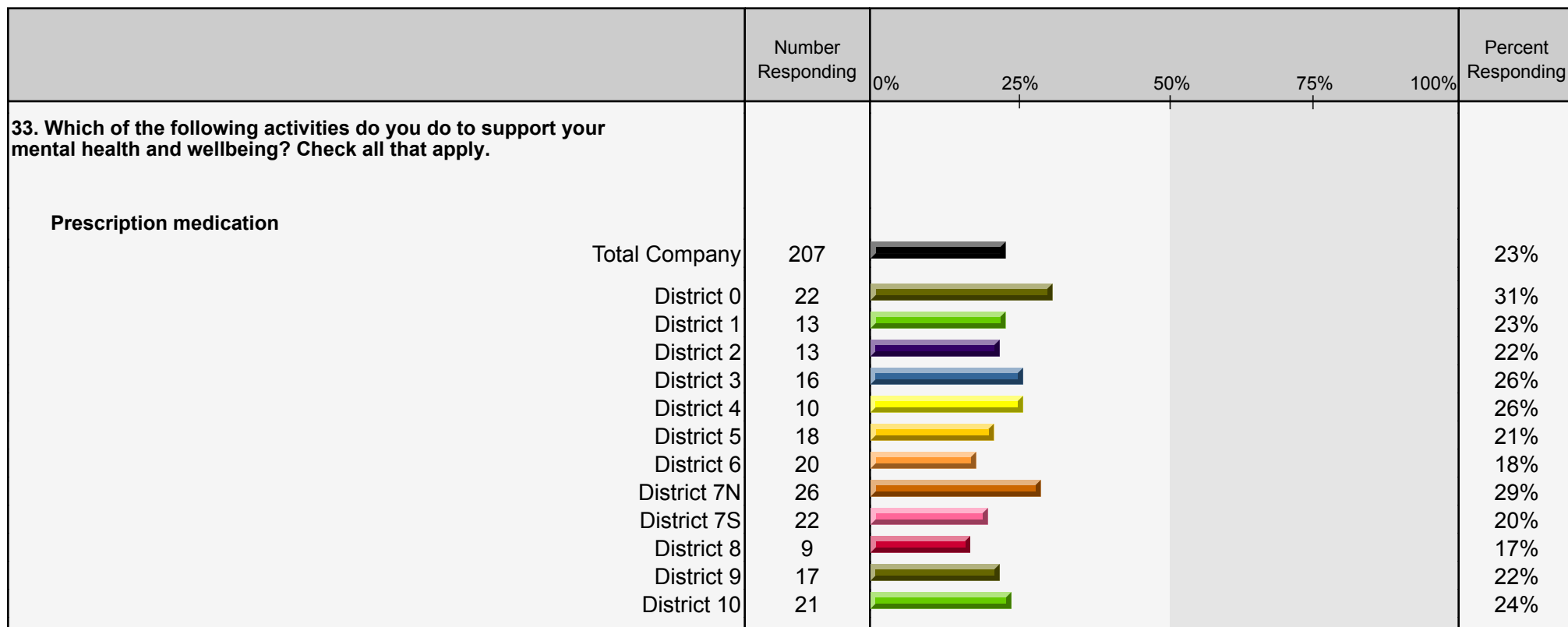
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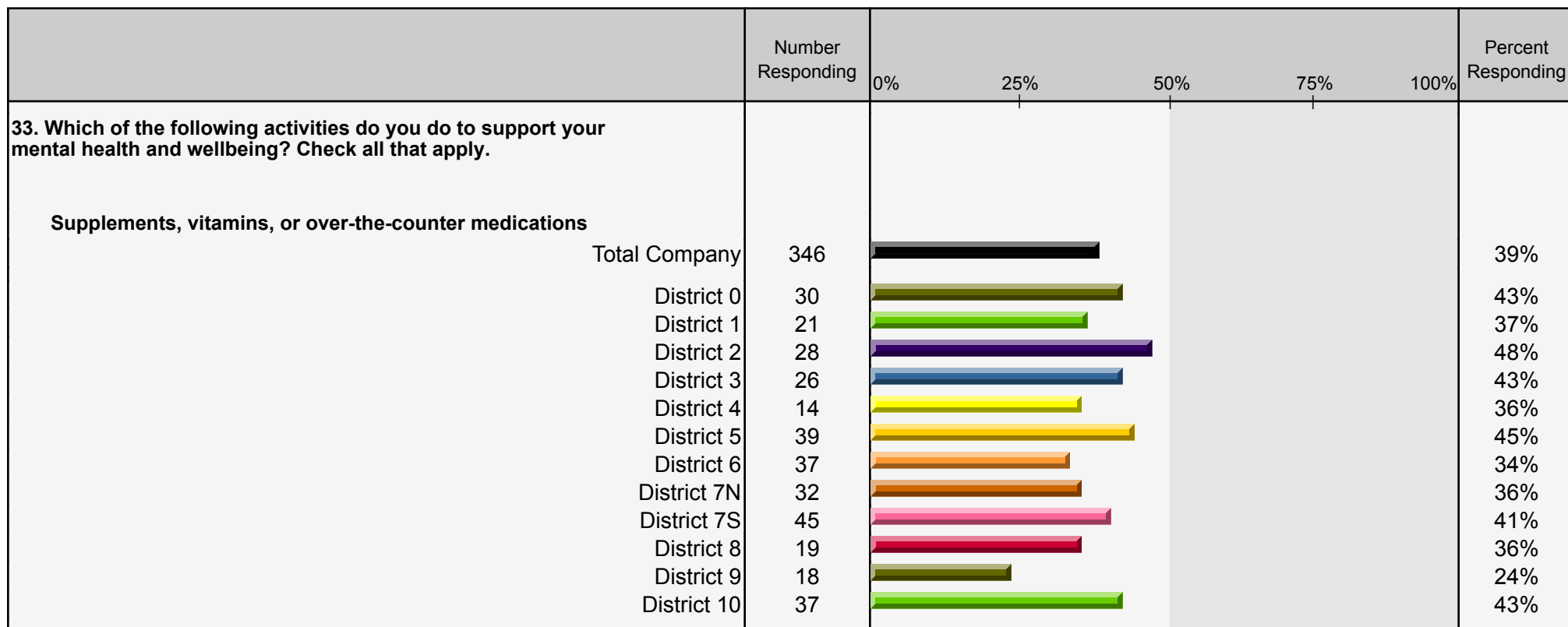
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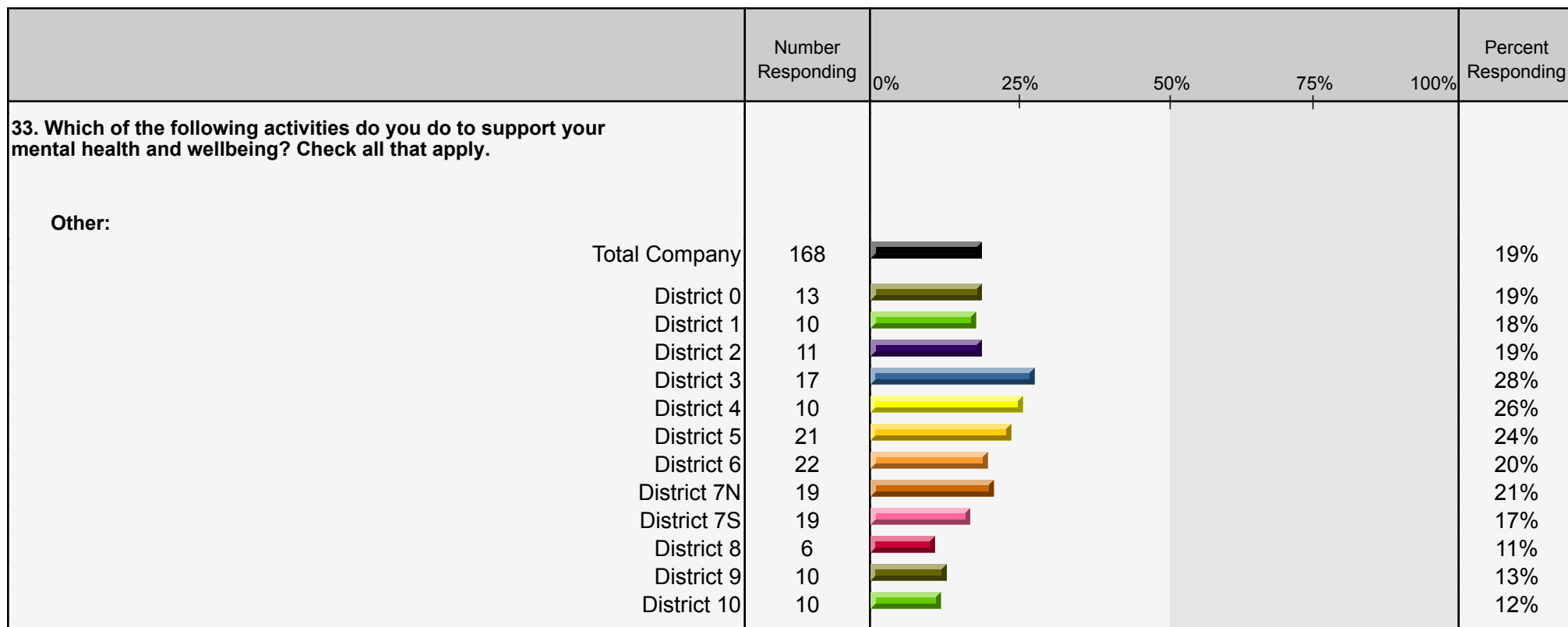
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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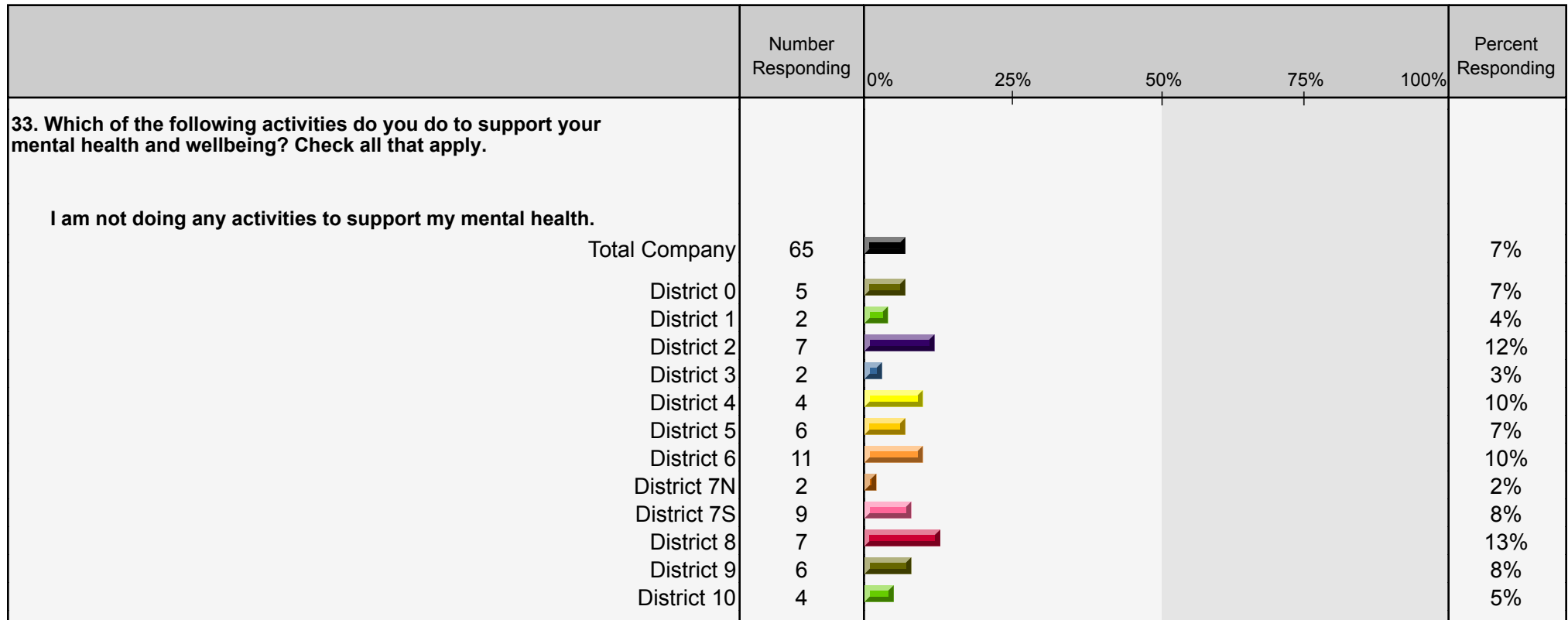
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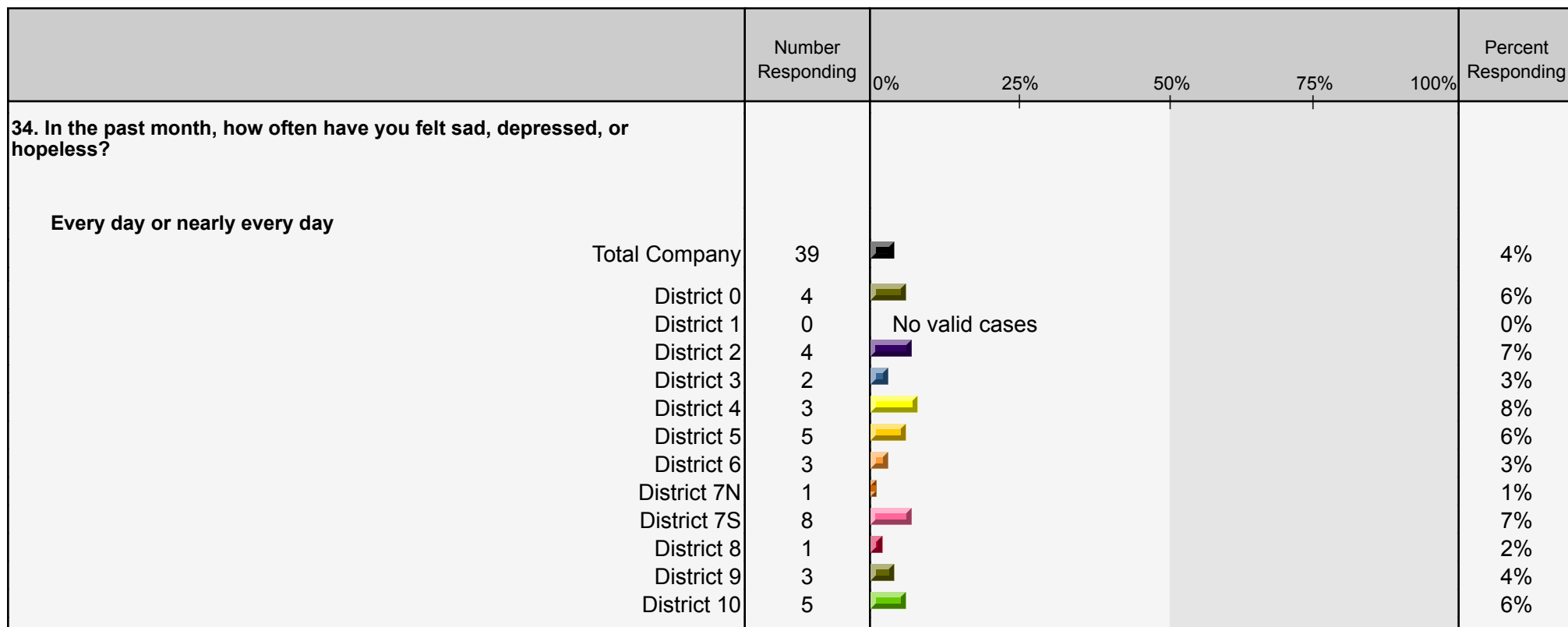
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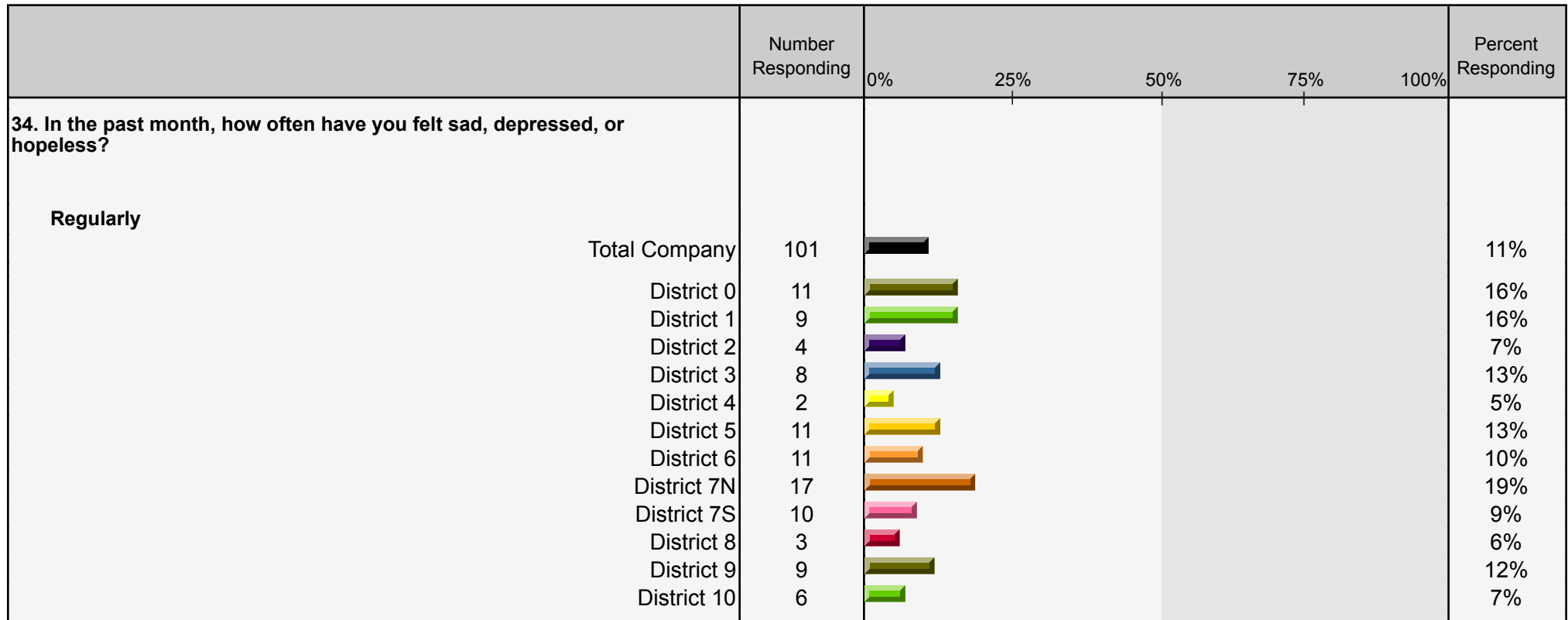
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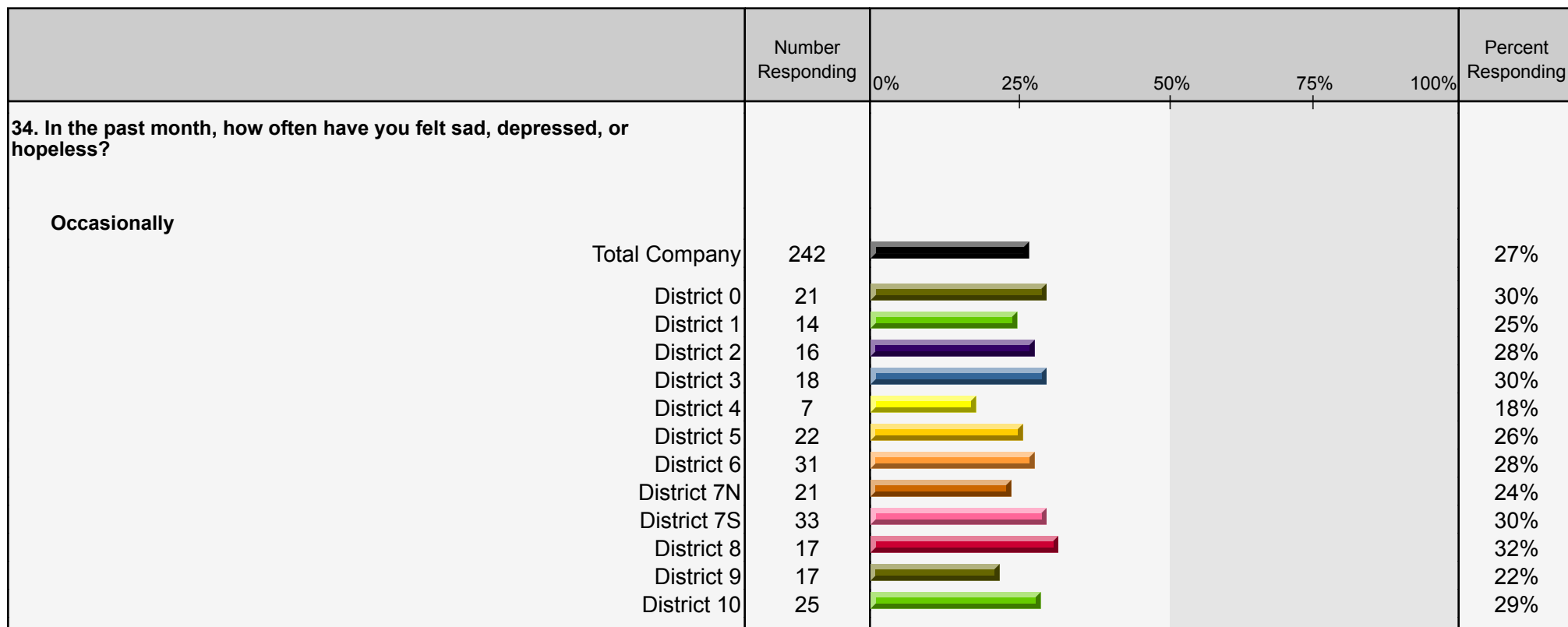
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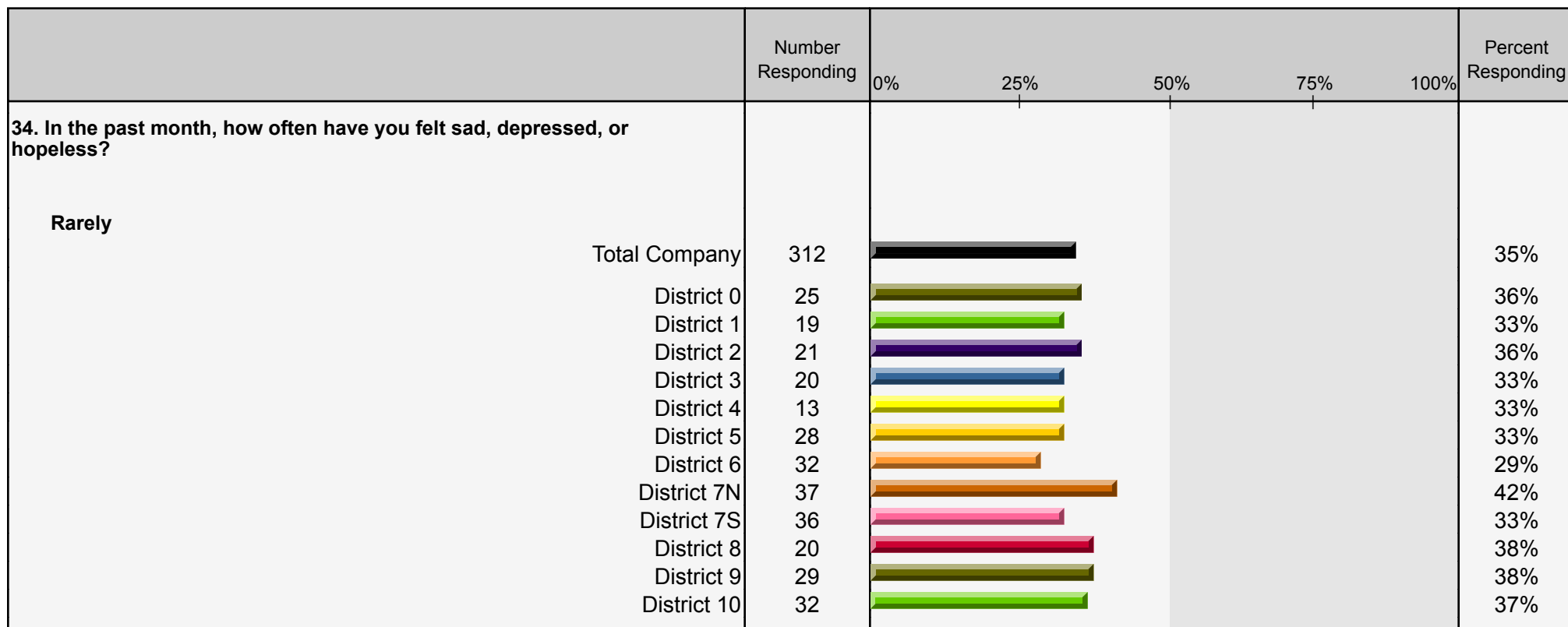
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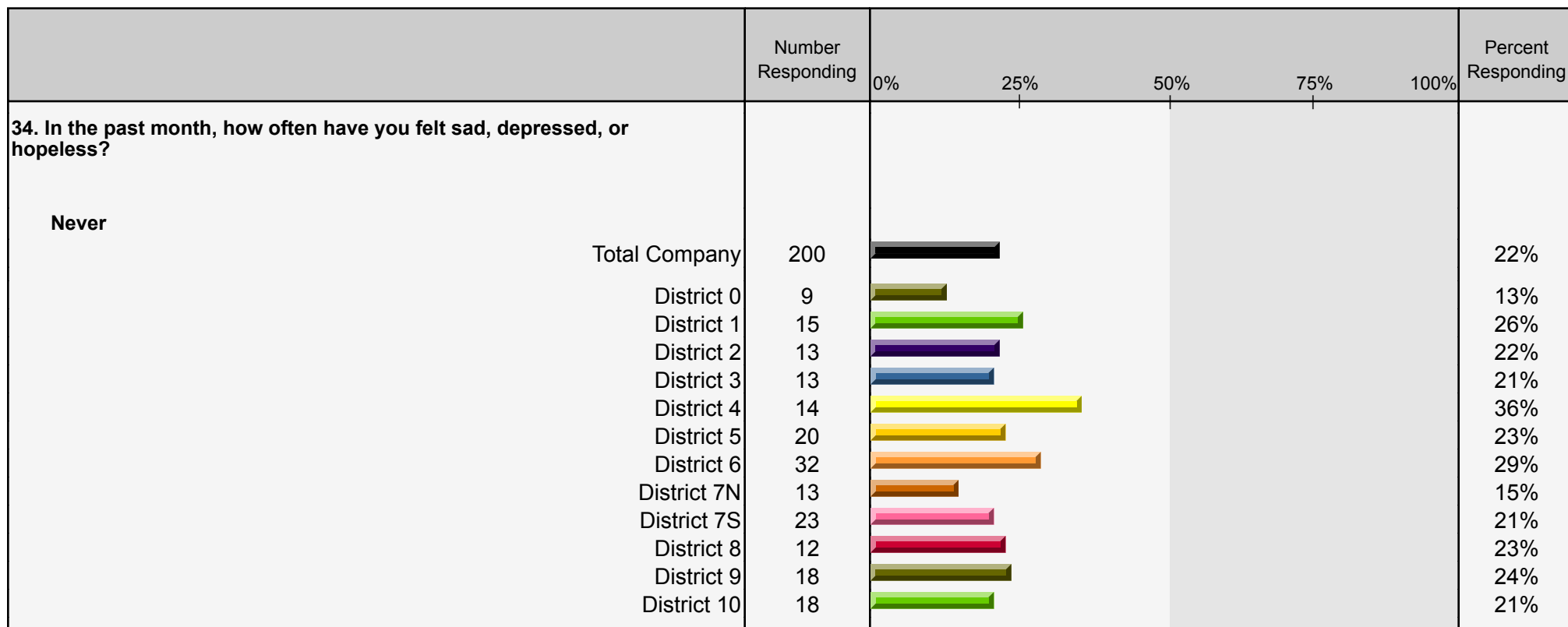
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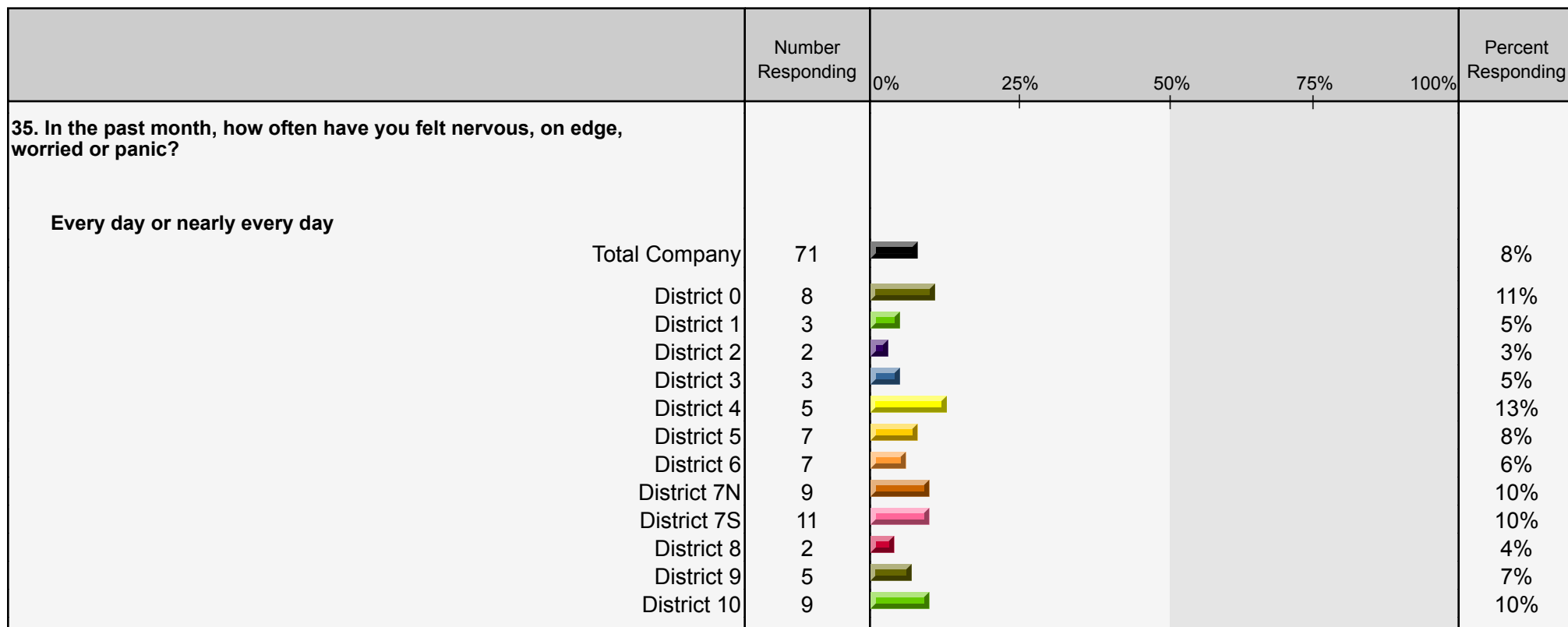
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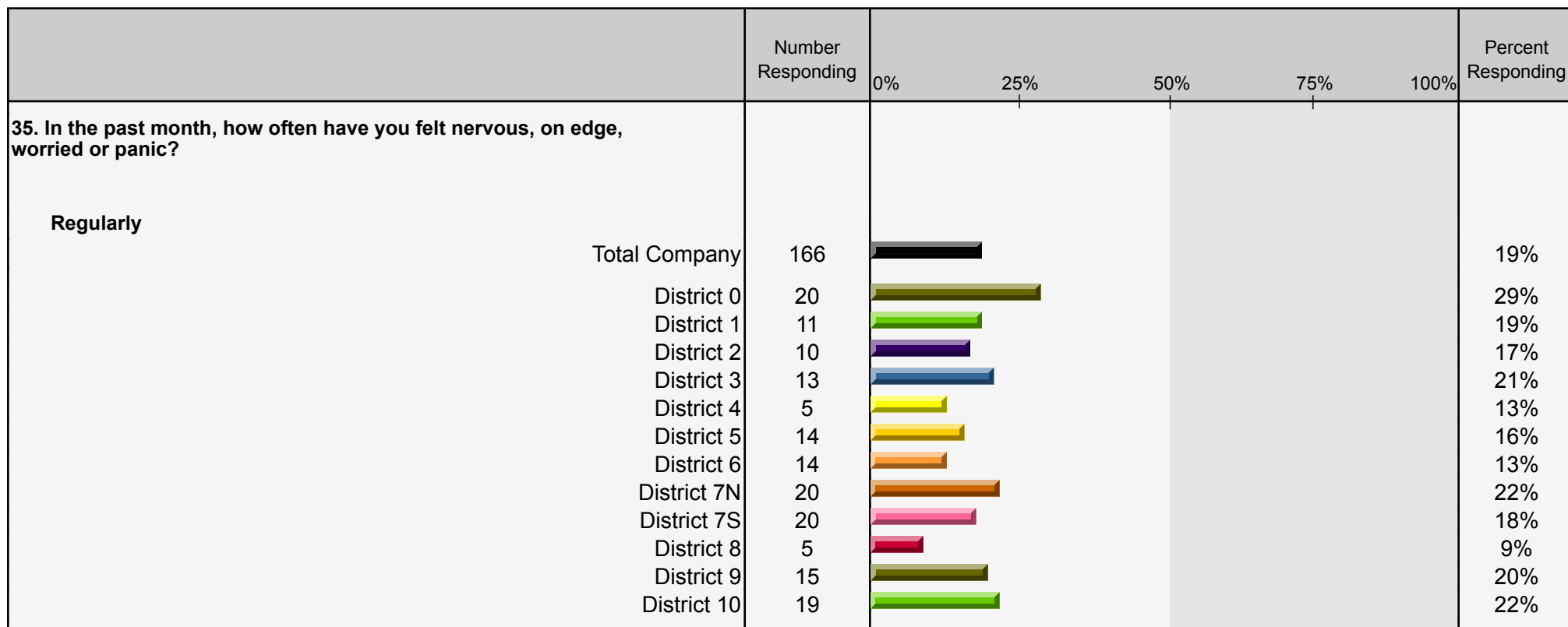
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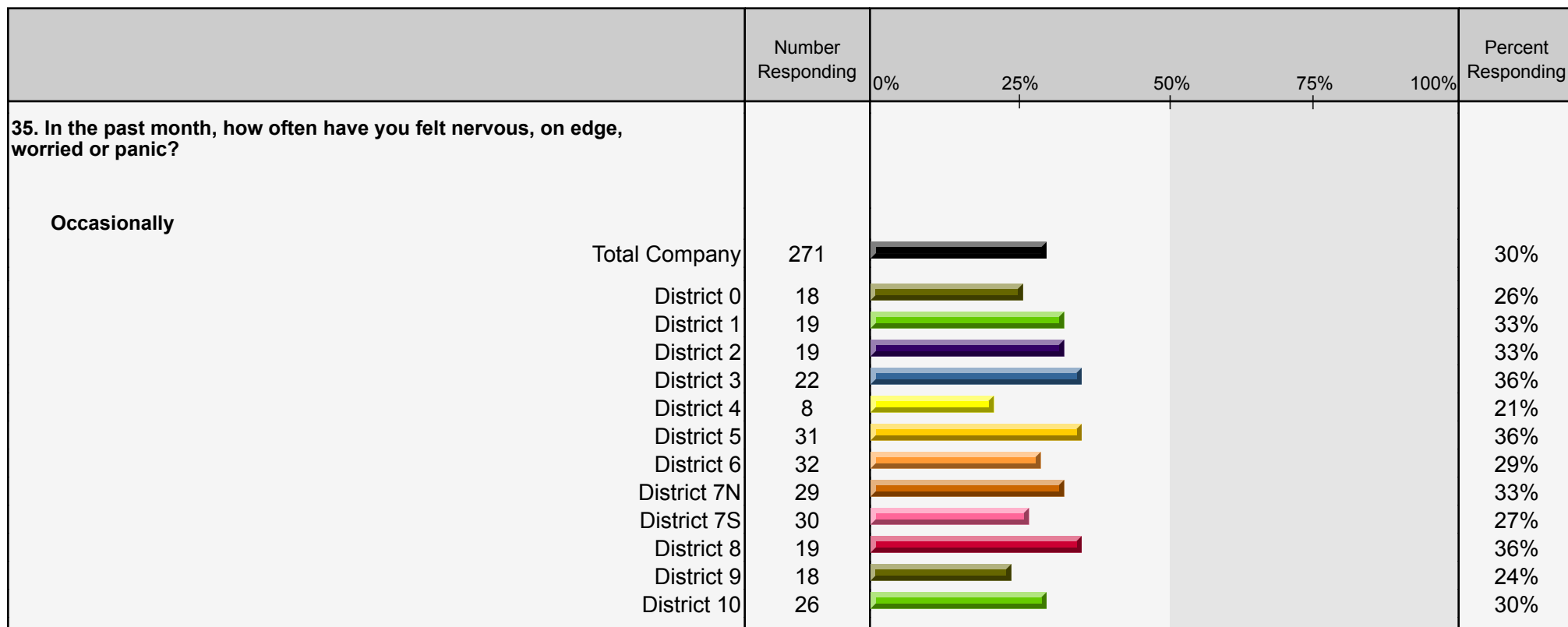
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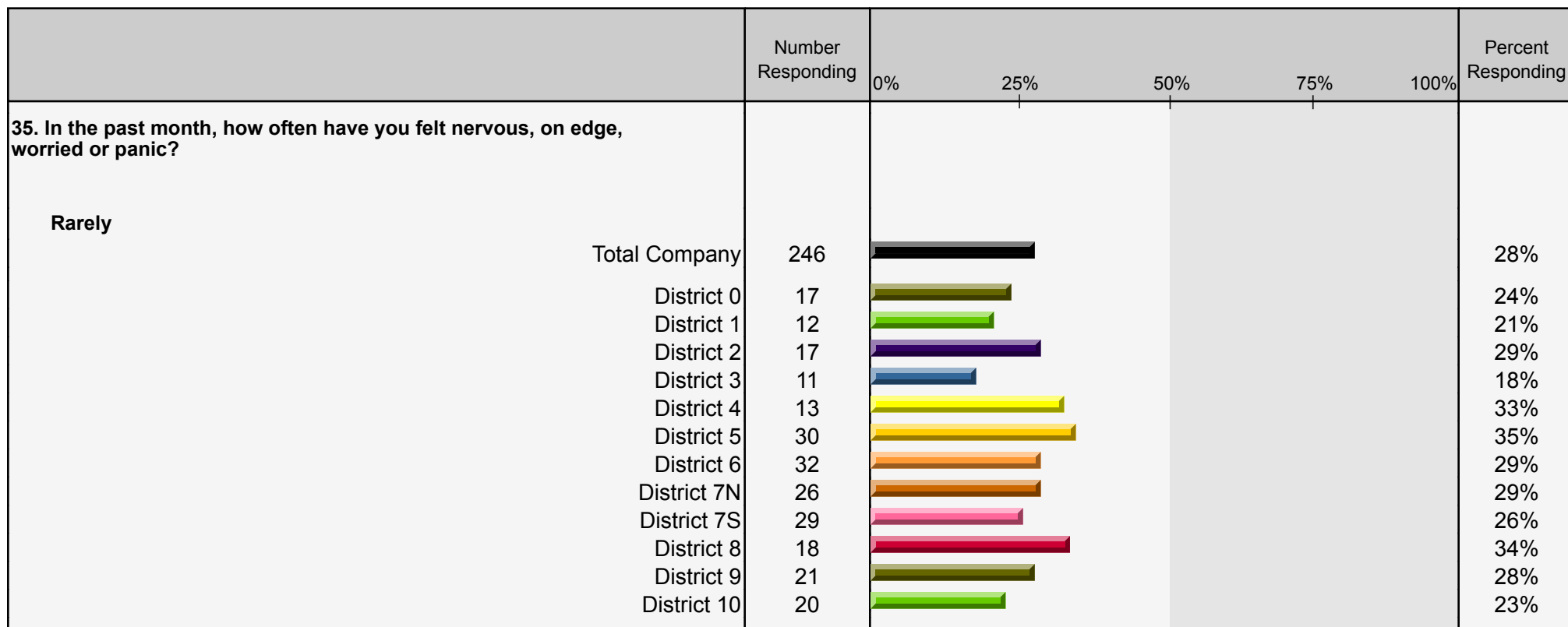
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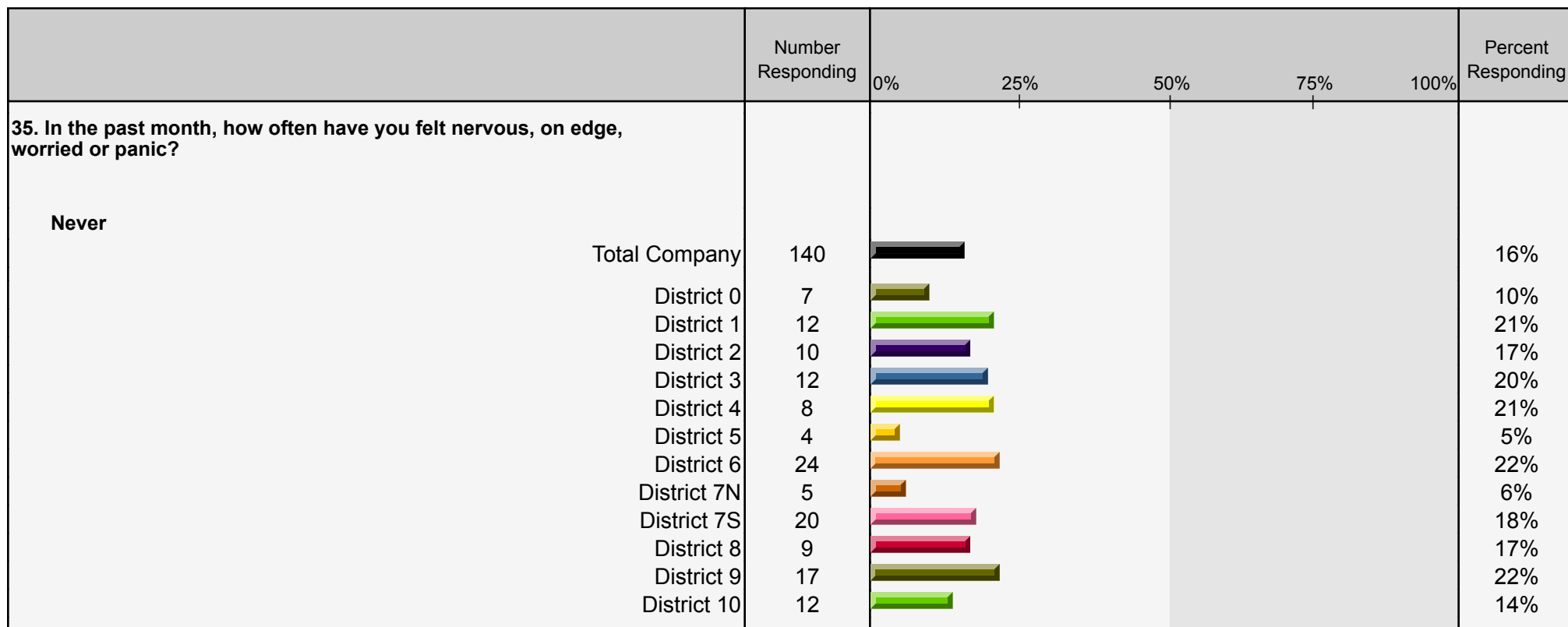
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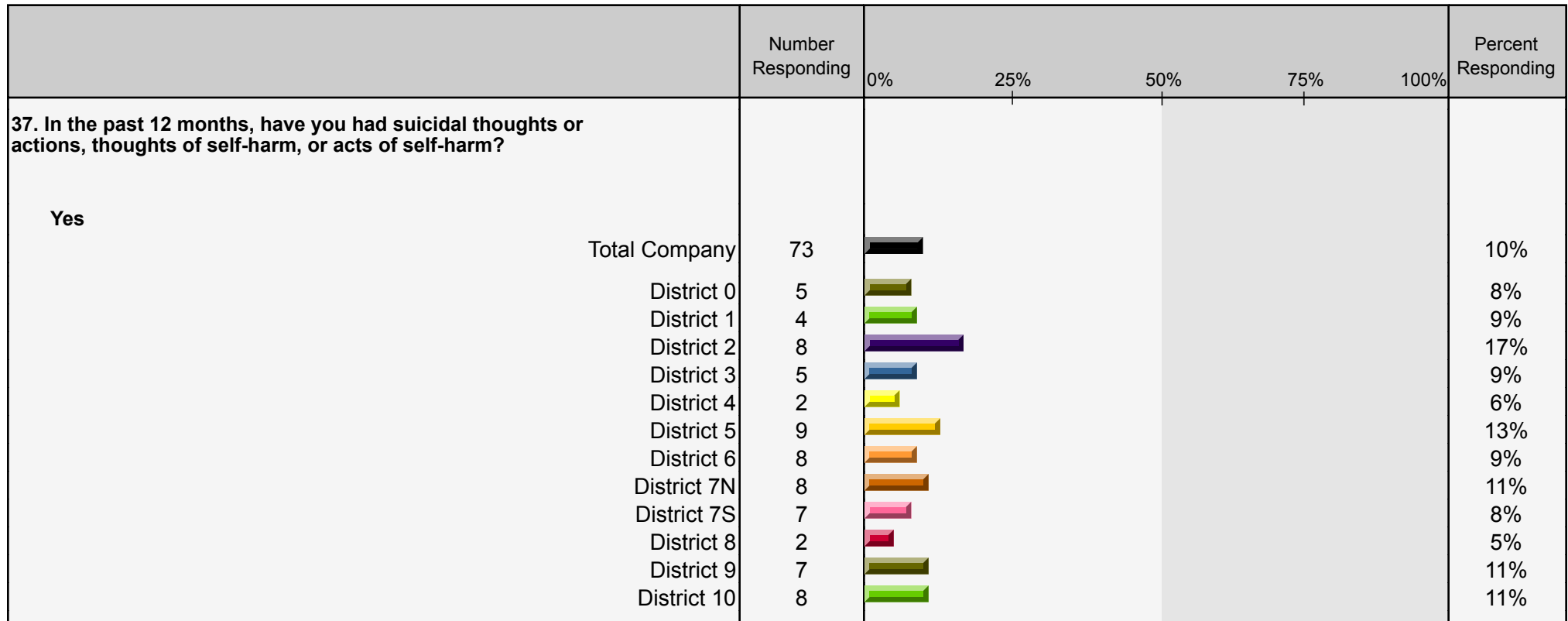
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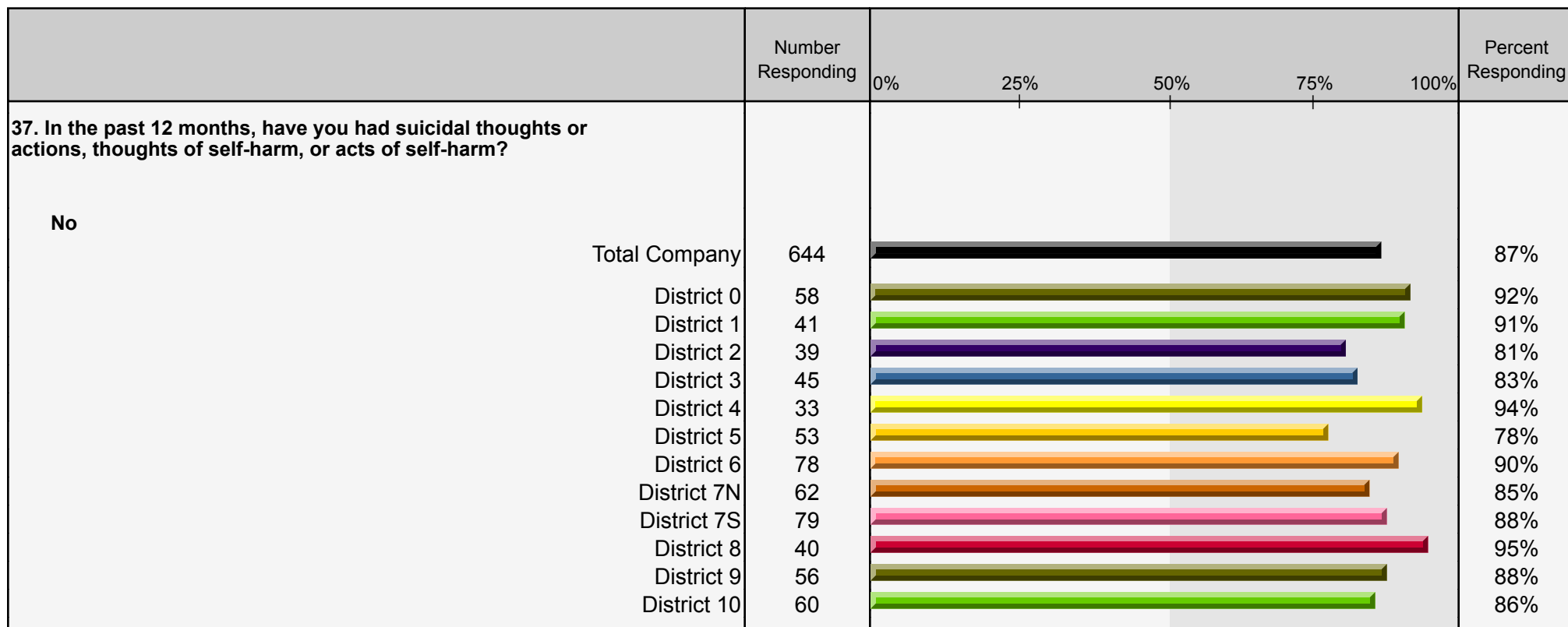
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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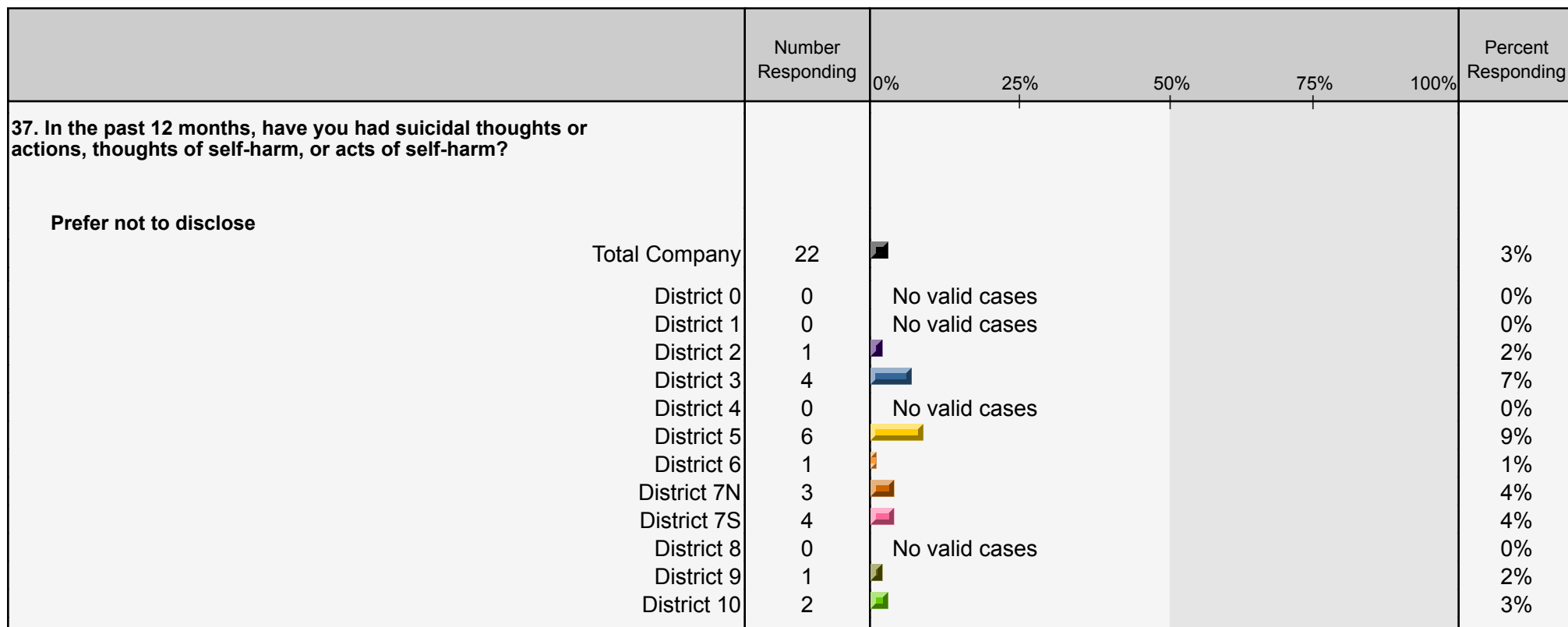
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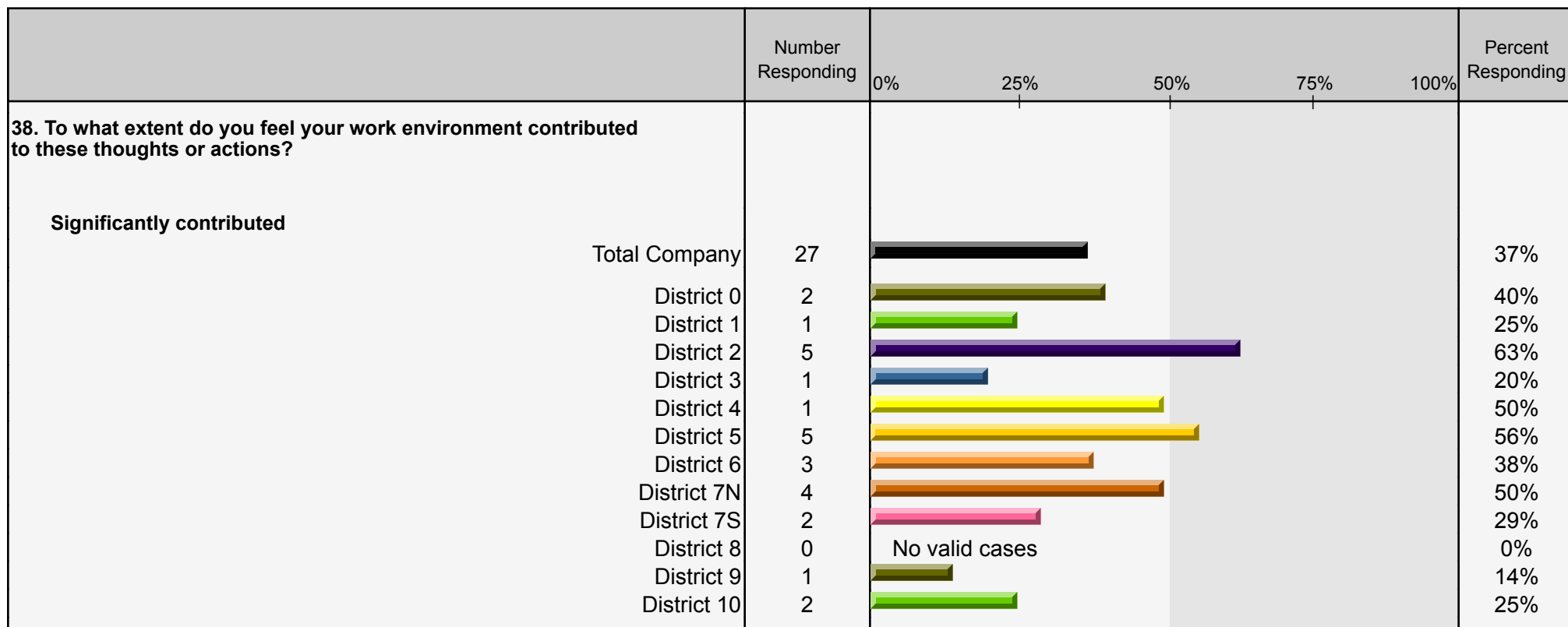
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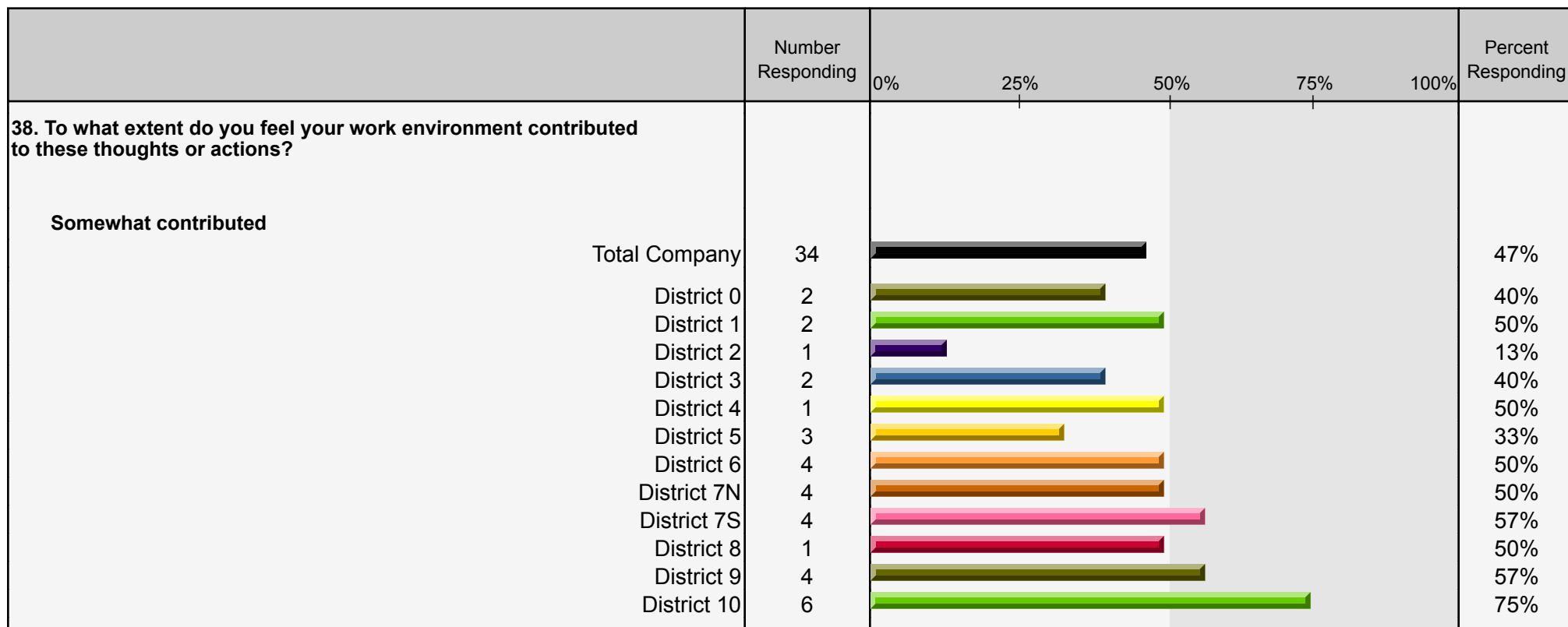
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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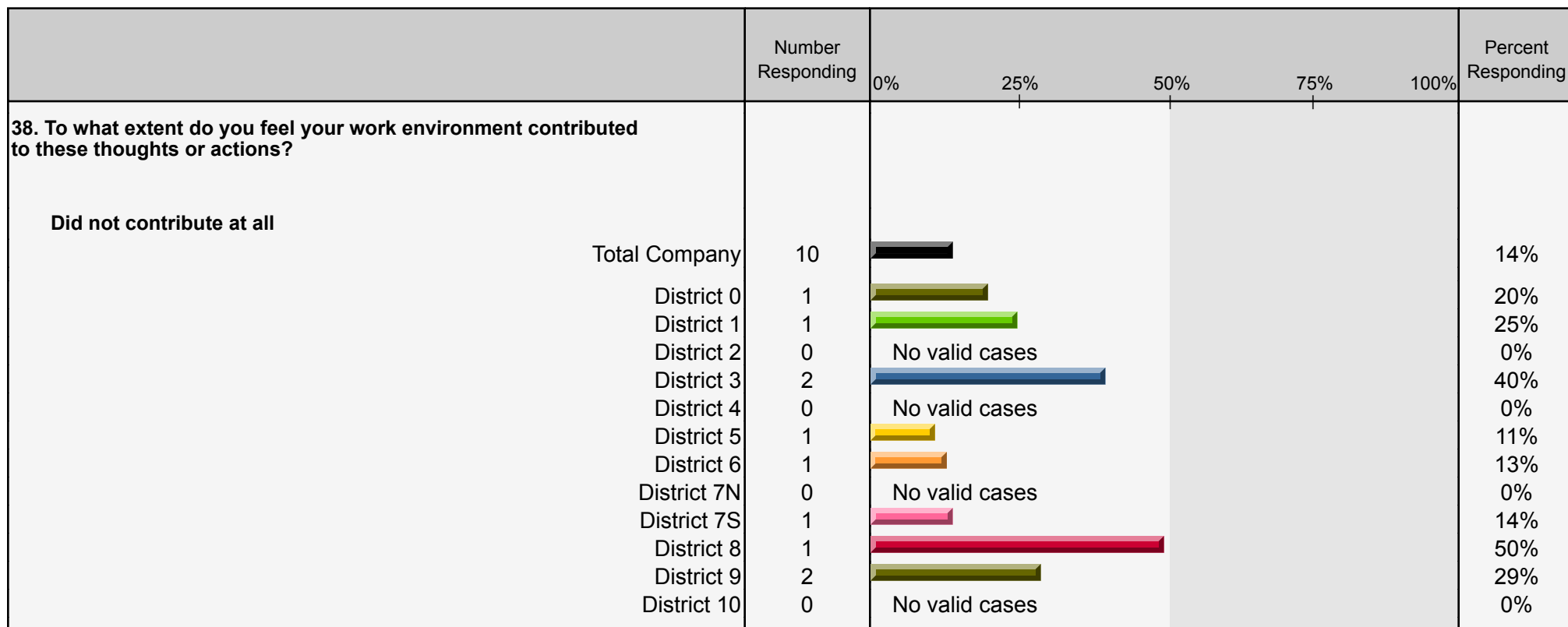
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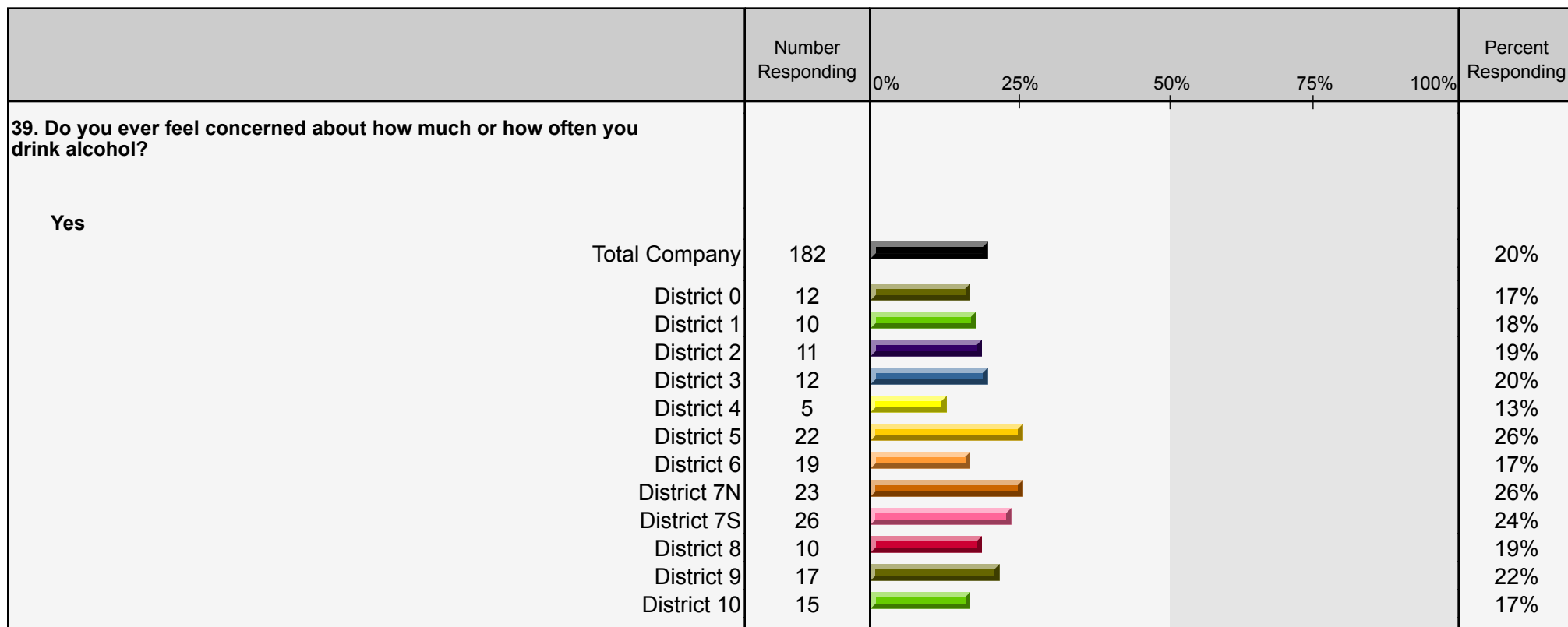
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Section III: Client Specific

	Number Responding	0%25%50%75%100%	Percent Responding
38. To what extent do you feel your work environment contributed to these thoughts or actions?			
Prefer not to disclose			
Total Company	2		3%
District 0	0	No valid cases	0%
District 1	0	No valid cases	0%
District 2	2		25%
District 3	0	No valid cases	0%
District 4	0	No valid cases	0%
District 5	0	No valid cases	0%
District 6	0	No valid cases	0%
District 7N	0	No valid cases	0%
District 7S	0	No valid cases	0%
District 8	0	No valid cases	0%
District 9	0	No valid cases	0%
District 10	0	No valid cases	0%

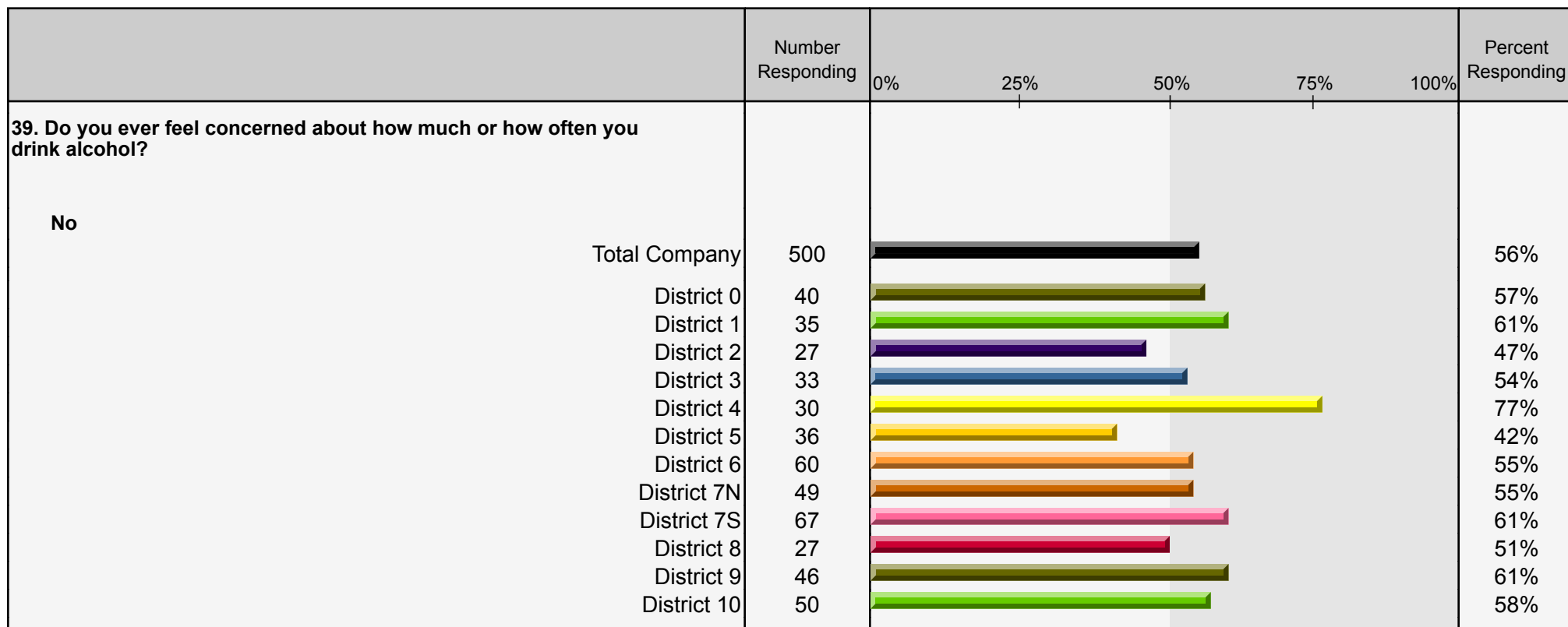
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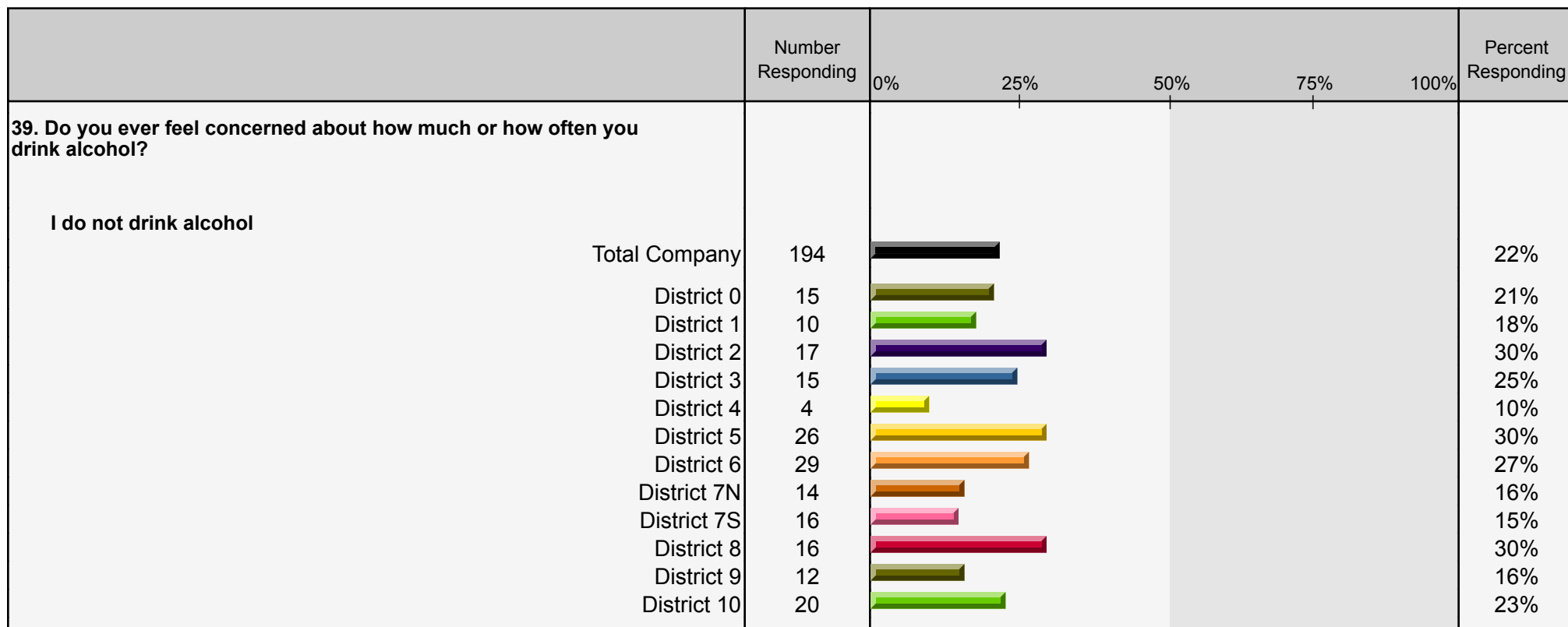
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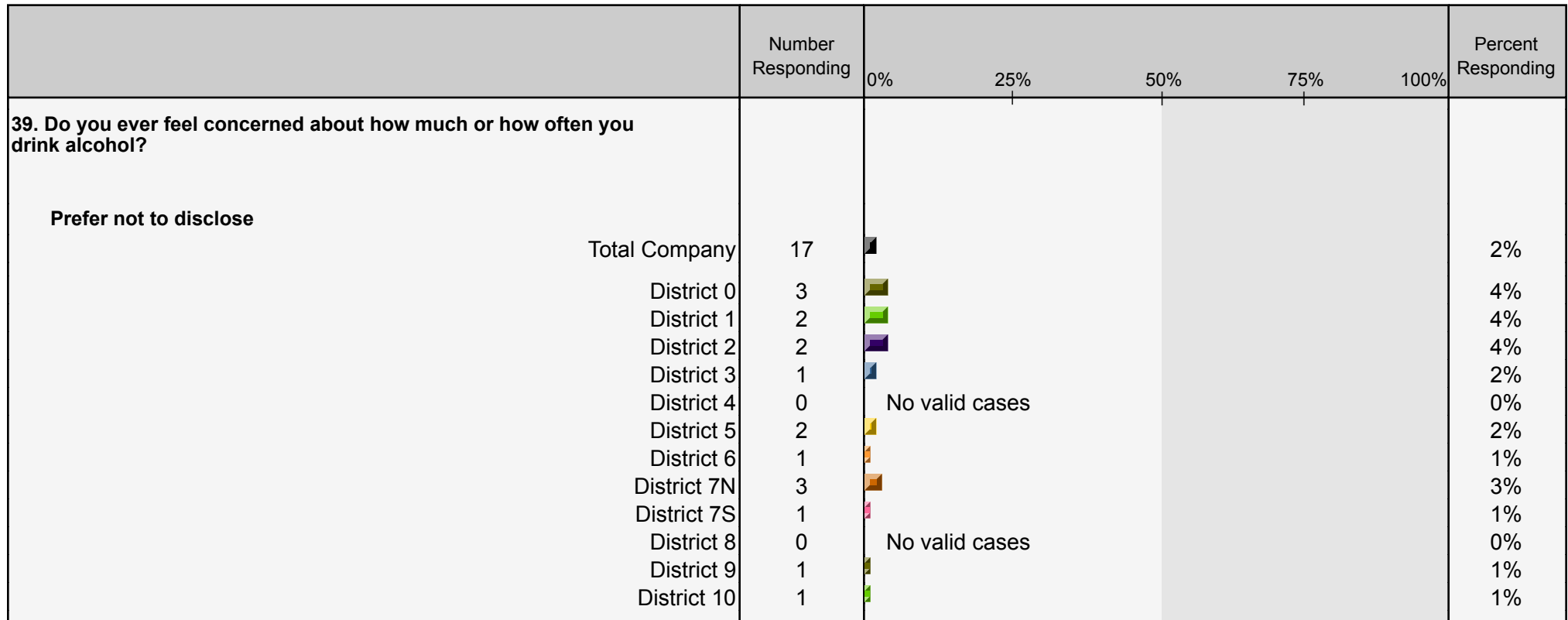
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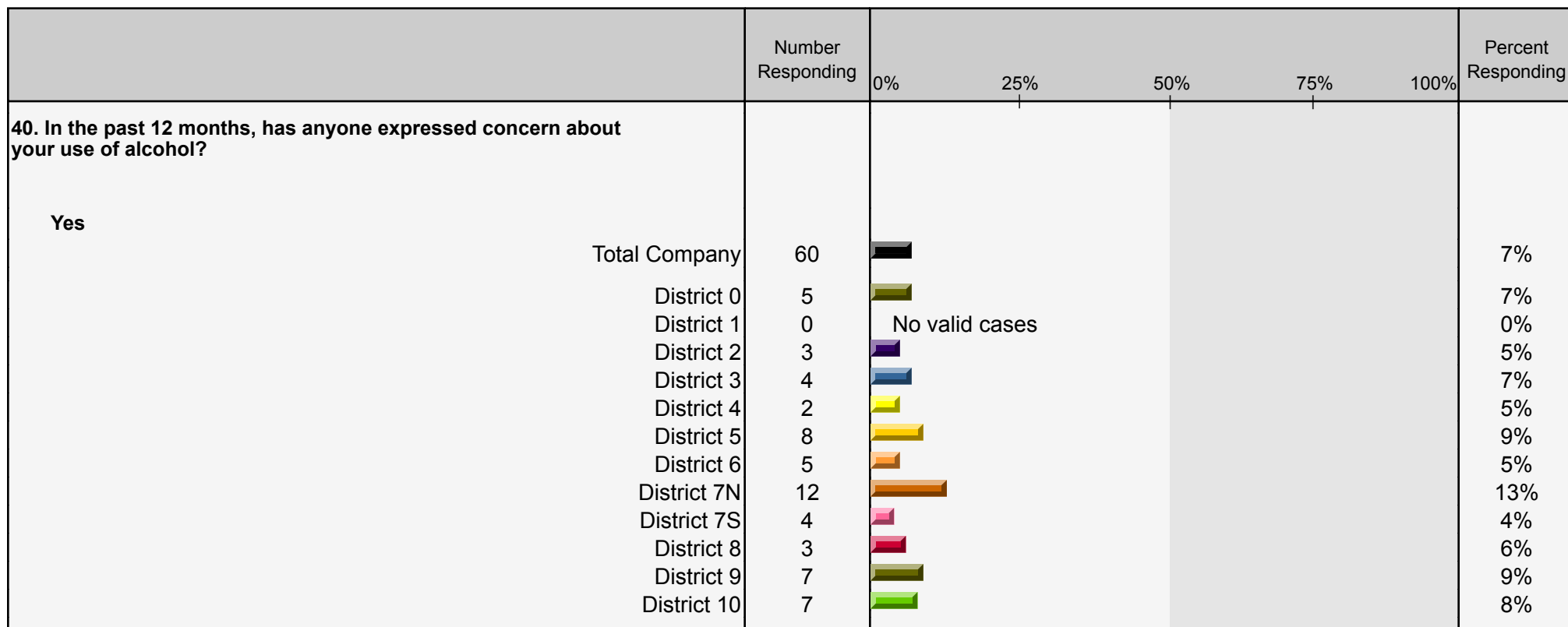
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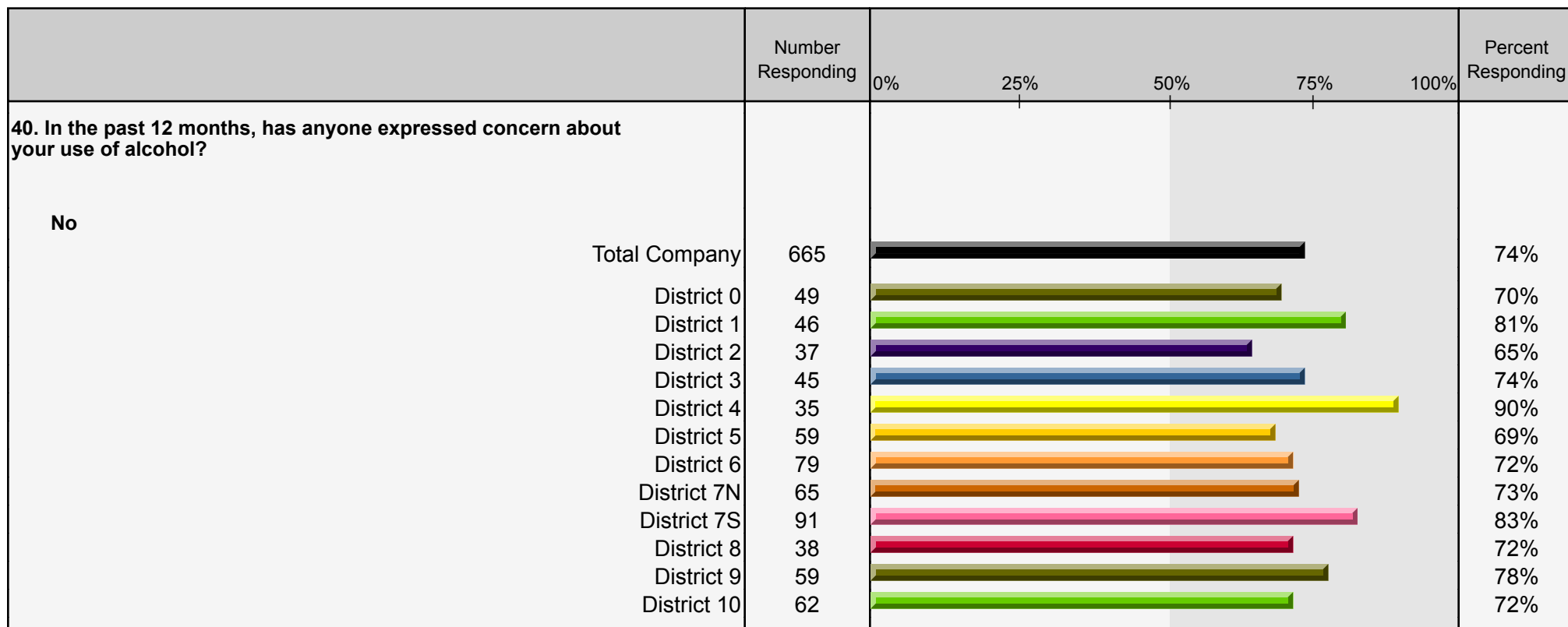
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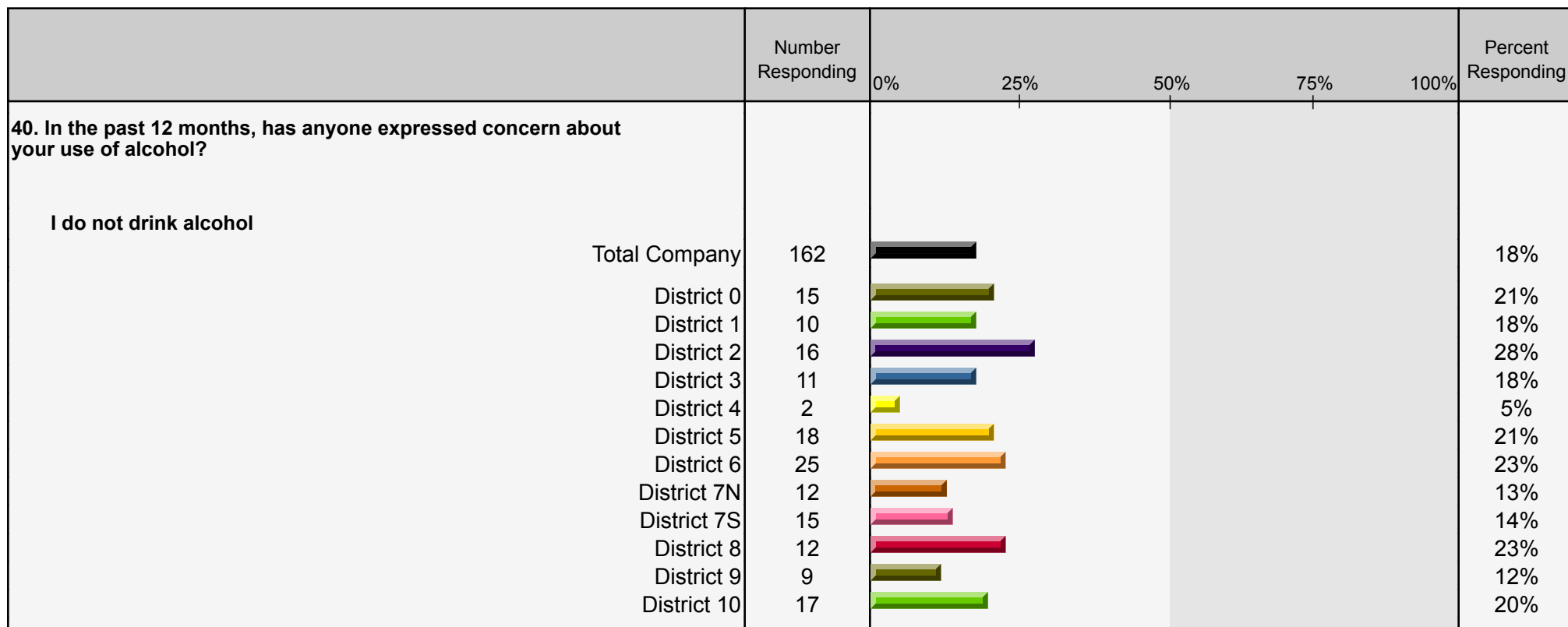
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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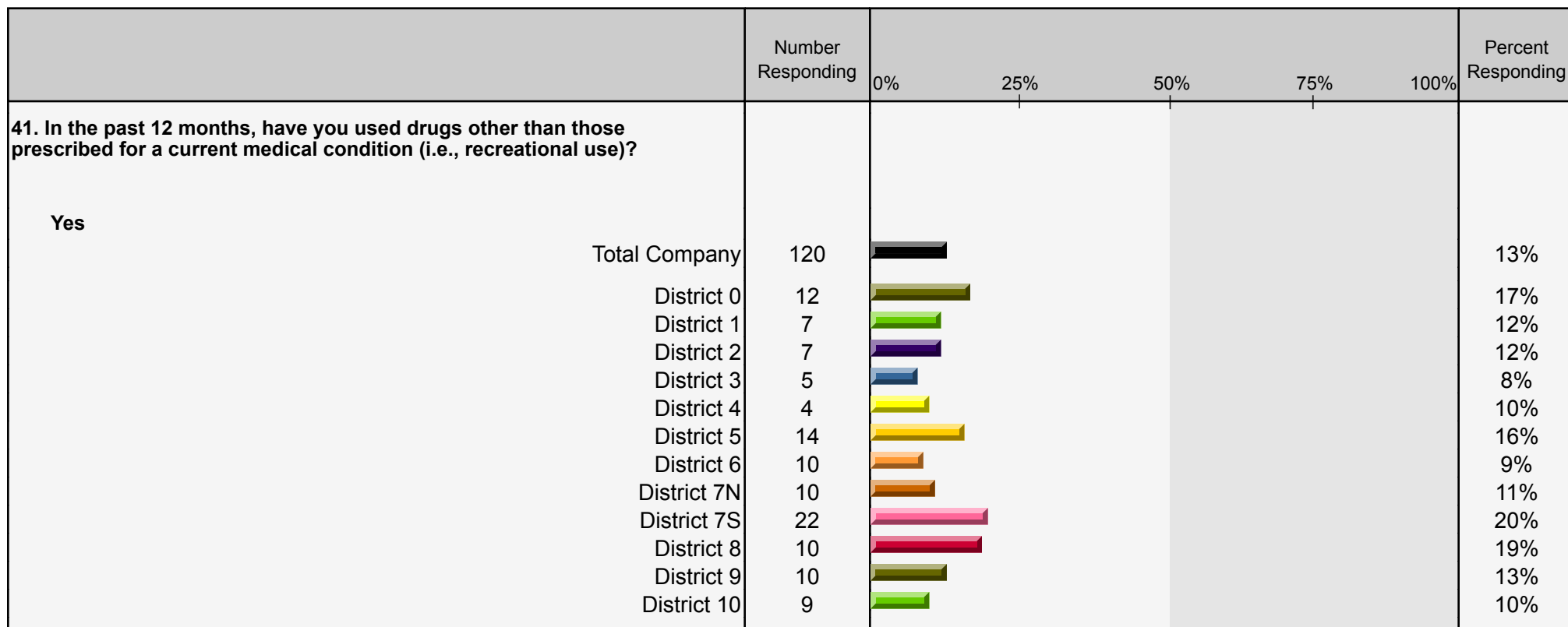
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Section III: Client Specific

	Number Responding	0%25%50%75%100%	Percent Responding
40. In the past 12 months, has anyone expressed concern about your use of alcohol?			
Prefer not to disclose			
Total Company	6		1%
District 0	1		1%
District 1	1		2%
District 2	1		2%
District 3	1		2%
District 4	0	No valid cases	0%
District 5	1		1%
District 6	0	No valid cases	0%
District 7N	0	No valid cases	0%
District 7S	0	No valid cases	0%
District 8	0	No valid cases	0%
District 9	1		1%
District 10	0	No valid cases	0%

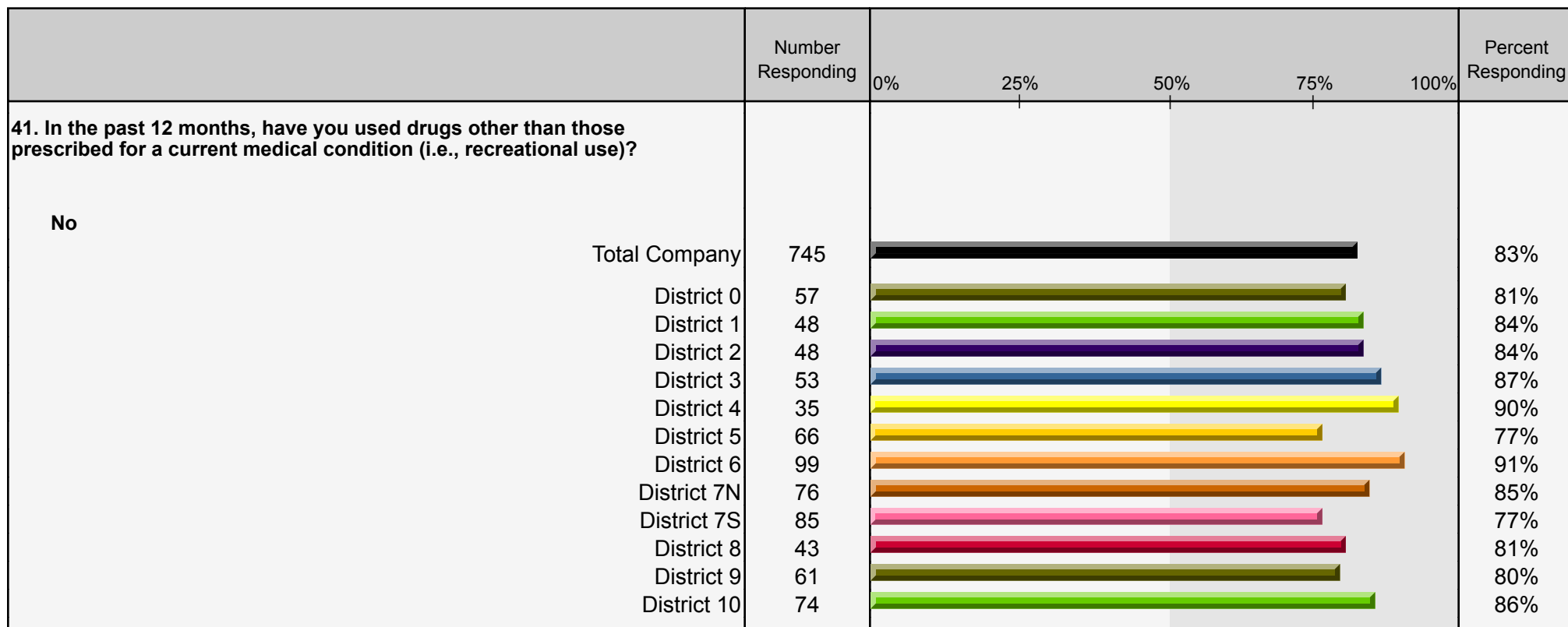
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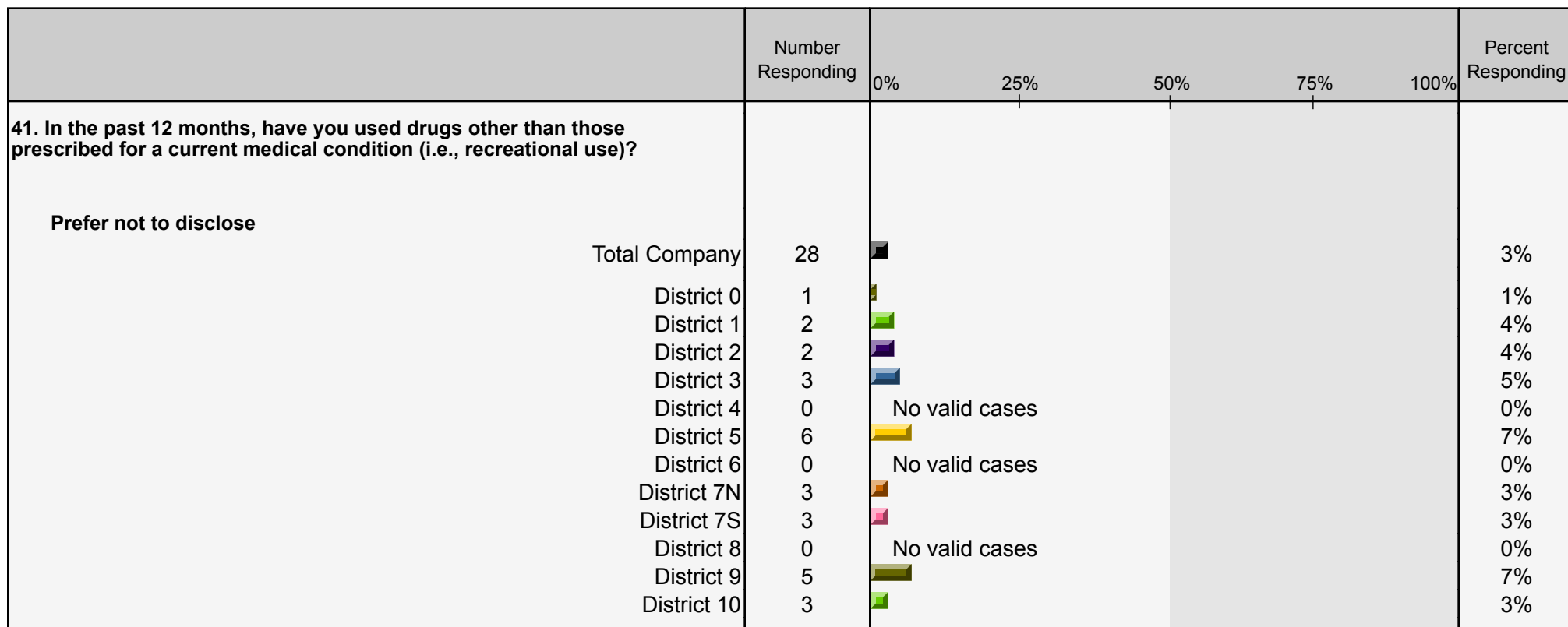
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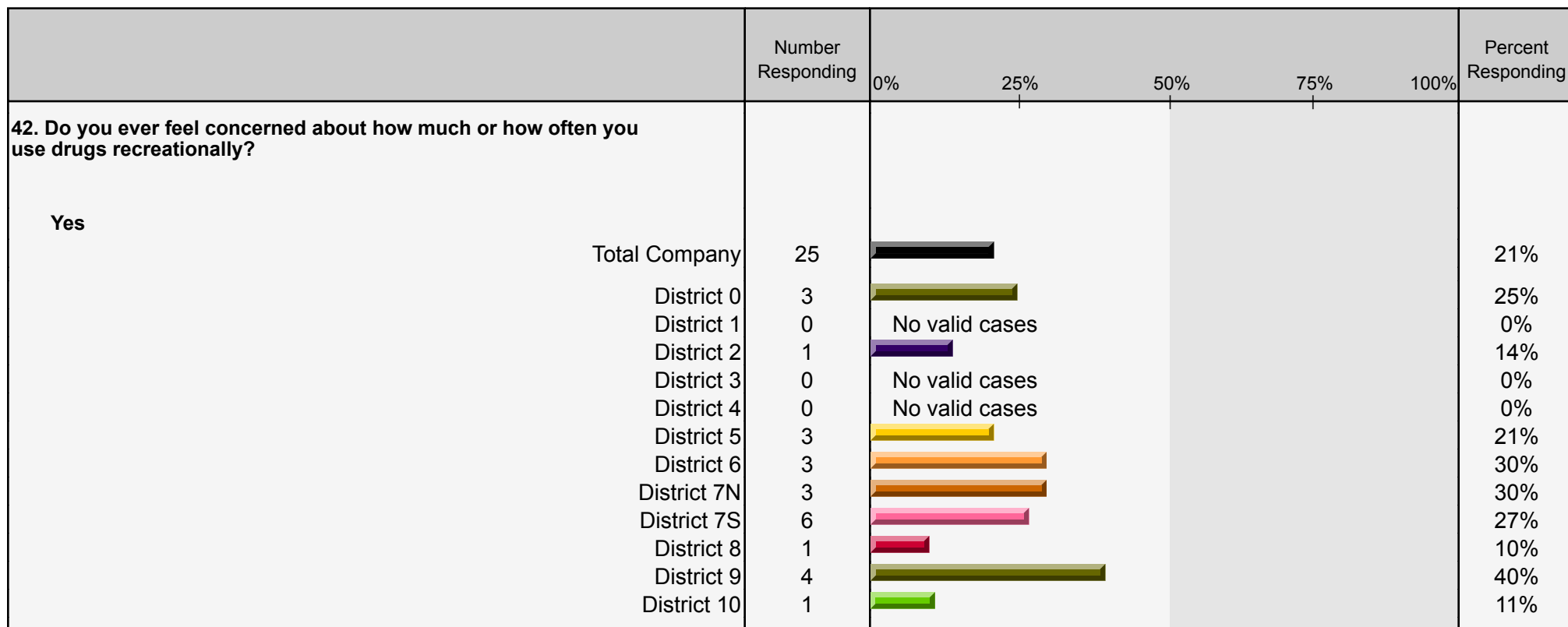
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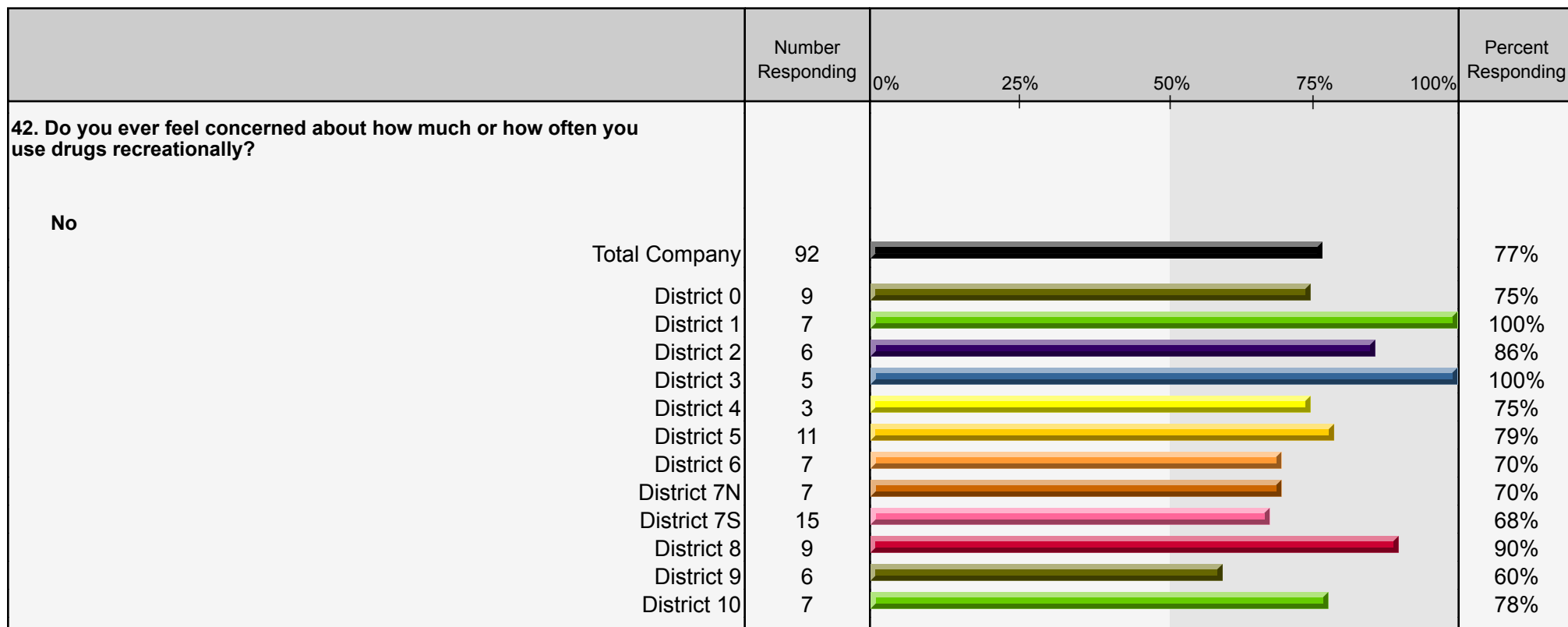
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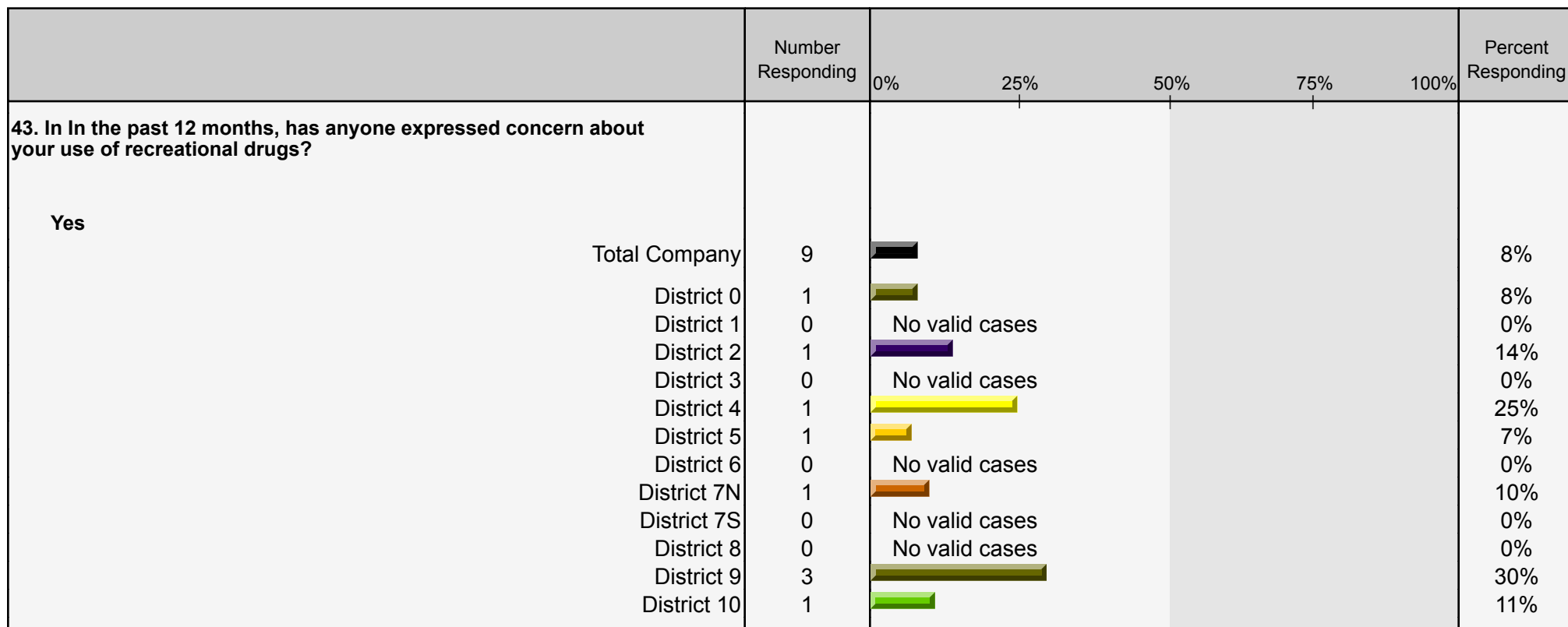
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	Number Responding	0%25%50%75%100%	Percent Responding
42. Do you ever feel concerned about how much or how often you use drugs recreationally?			
Prefer not to disclose			
Total Company	3		3%
District 0	0	No valid cases	0%
District 1	0	No valid cases	0%
District 2	0	No valid cases	0%
District 3	0	No valid cases	0%
District 4	1		25%
District 5	0	No valid cases	0%
District 6	0	No valid cases	0%
District 7N	0	No valid cases	0%
District 7S	1		5%
District 8	0	No valid cases	0%
District 9	0	No valid cases	0%
District 10	1		11%

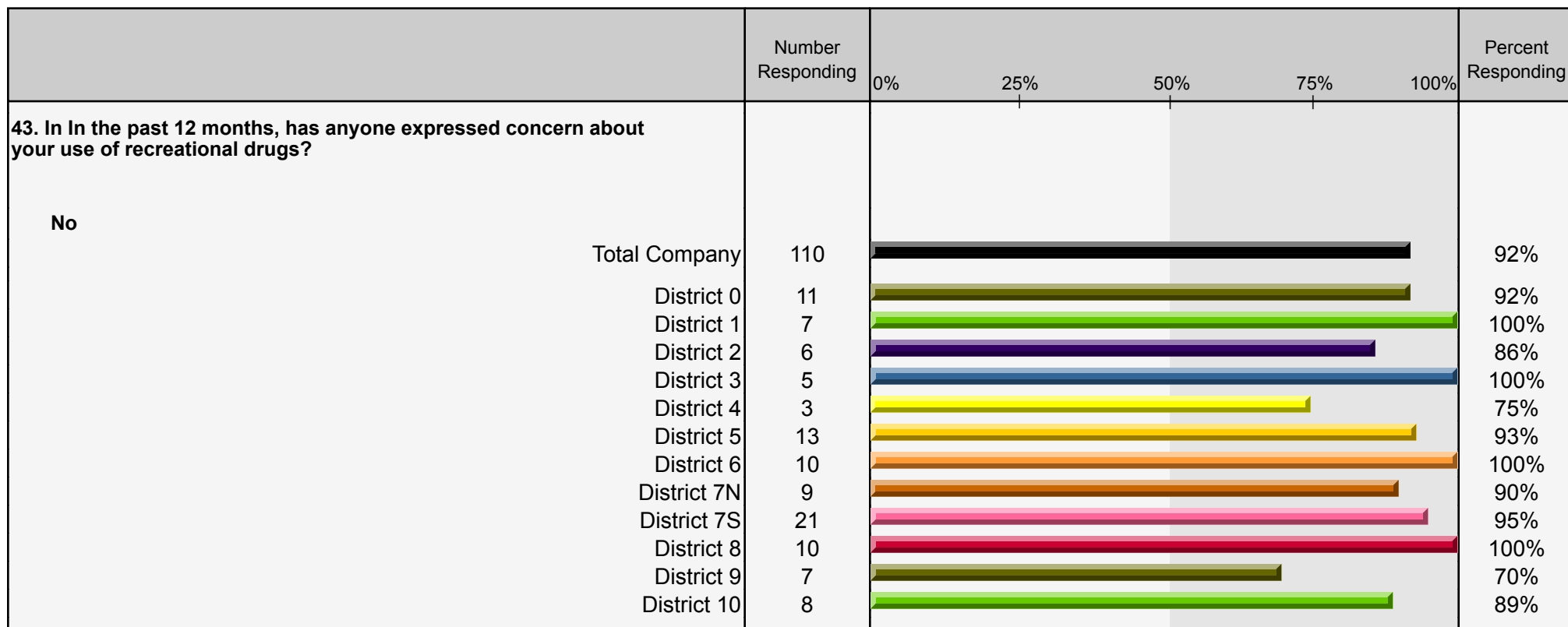
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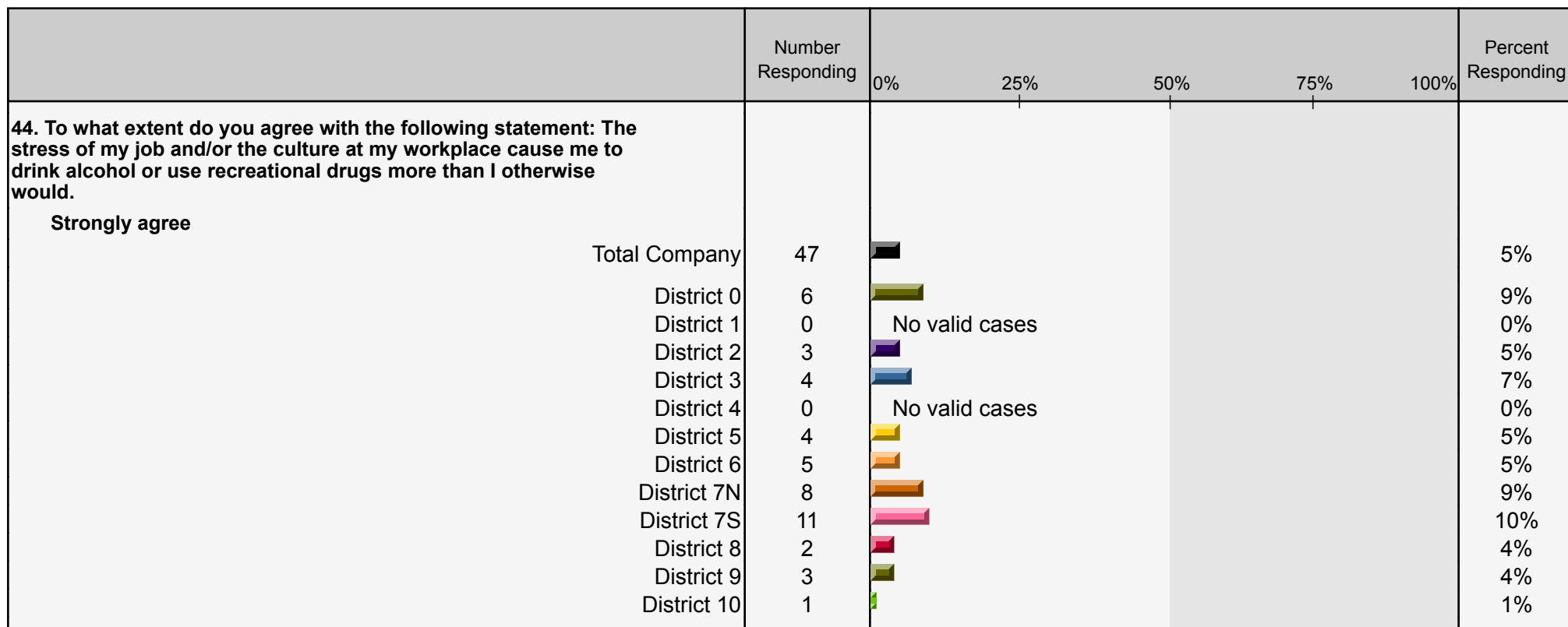
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	Number Responding	0%	25%	50%	75%	100%	Percent Responding
43. In the past 12 months, has anyone expressed concern about your use of recreational drugs?							
Prefer not to disclose							
Total Company	1						1%
District 0	0	No valid cases					0%
District 1	0	No valid cases					0%
District 2	0	No valid cases					0%
District 3	0	No valid cases					0%
District 4	0	No valid cases					0%
District 5	0	No valid cases					0%
District 6	0	No valid cases					0%
District 7N	0	No valid cases					0%
District 7S	1						5%
District 8	0	No valid cases					0%
District 9	0	No valid cases					0%
District 10	0	No valid cases					0%

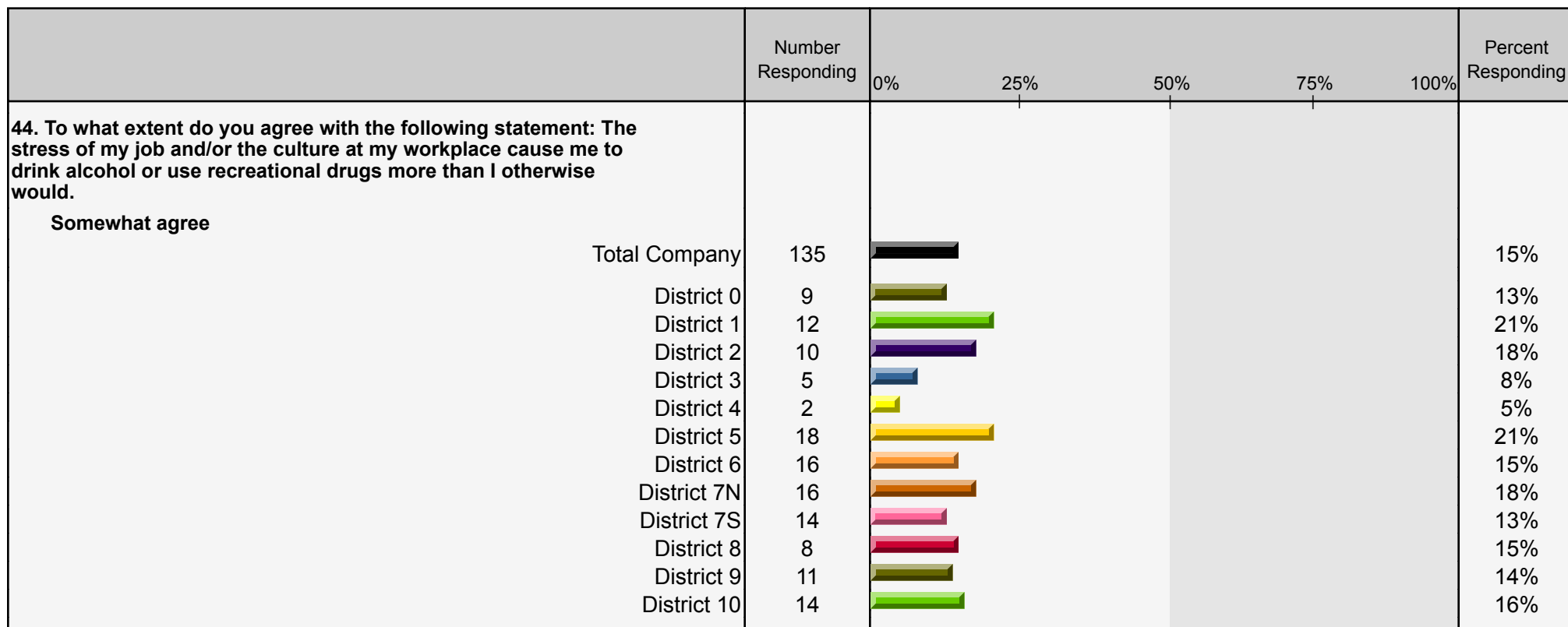
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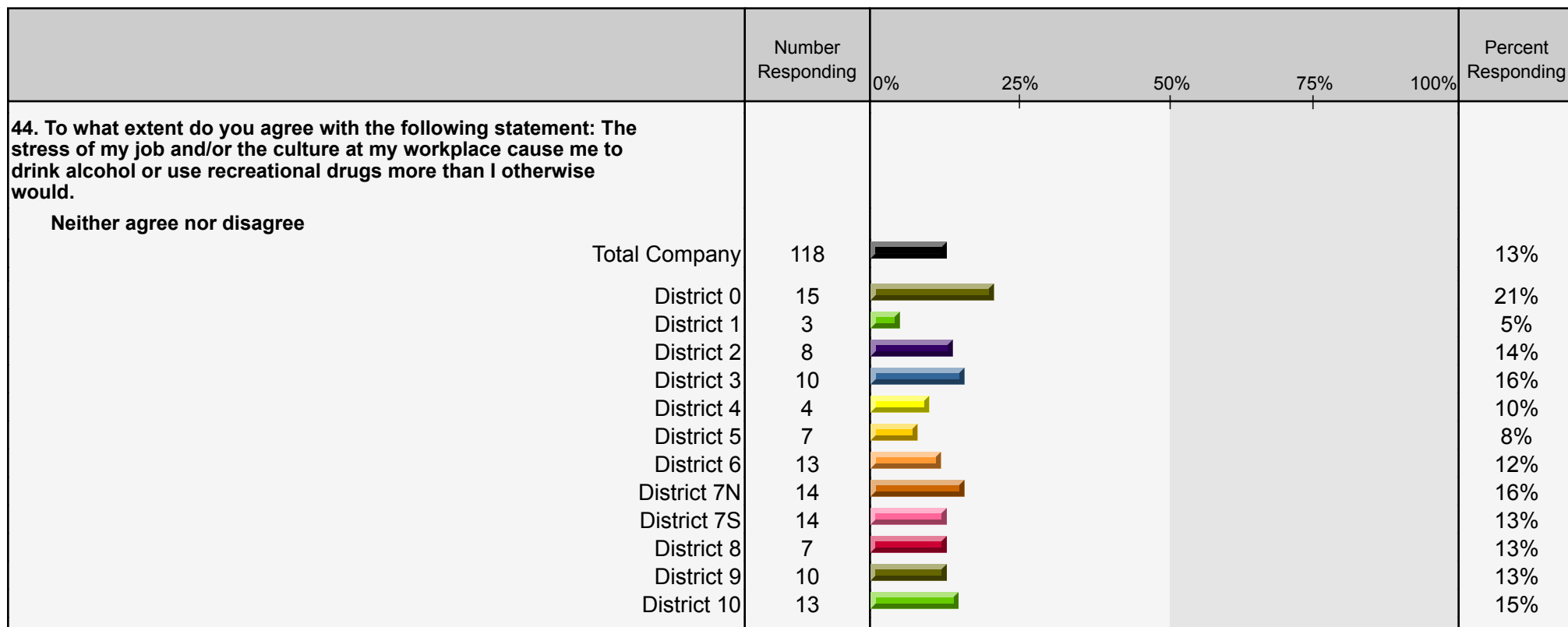
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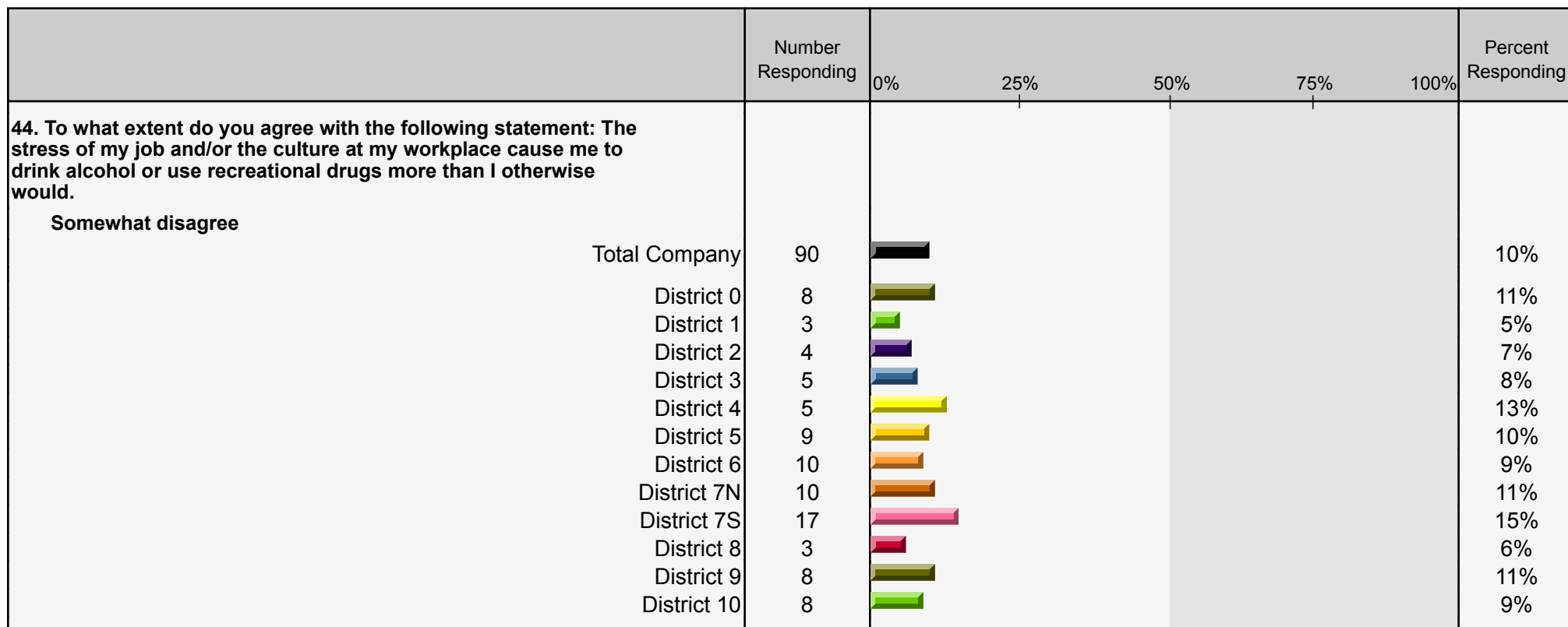
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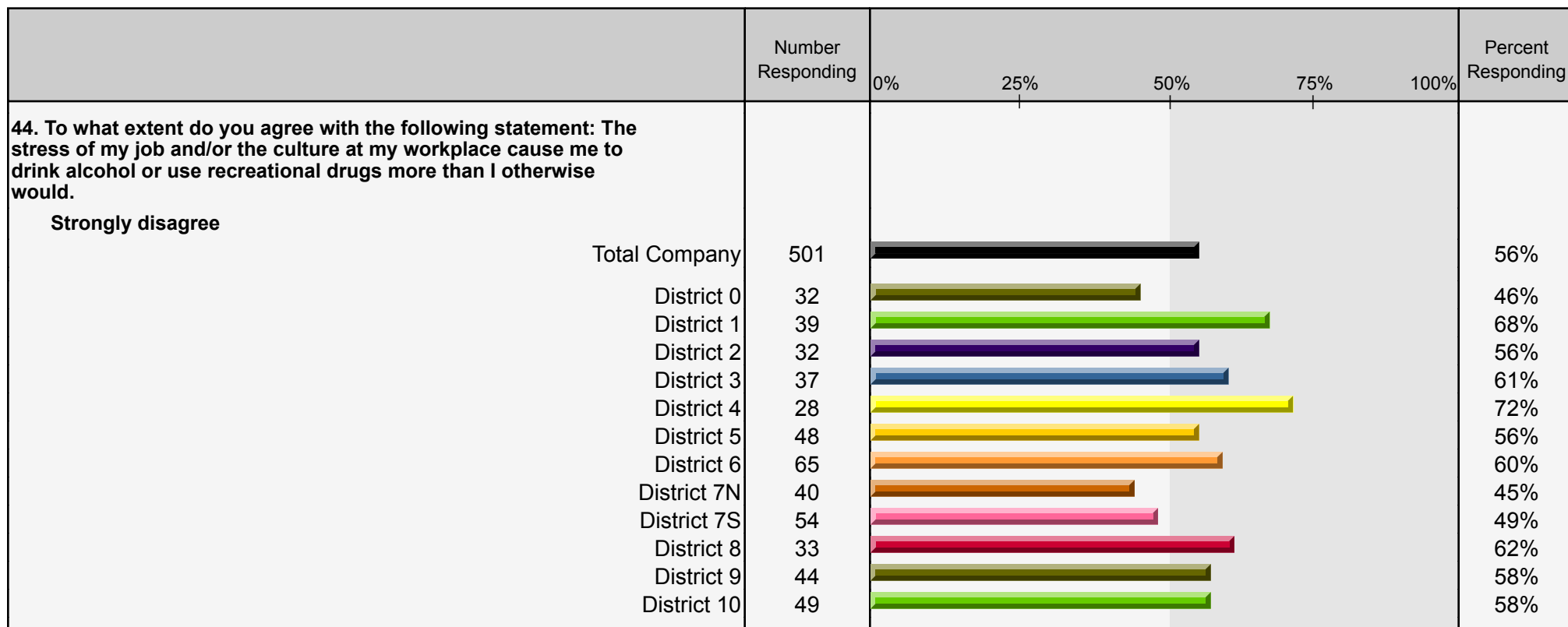
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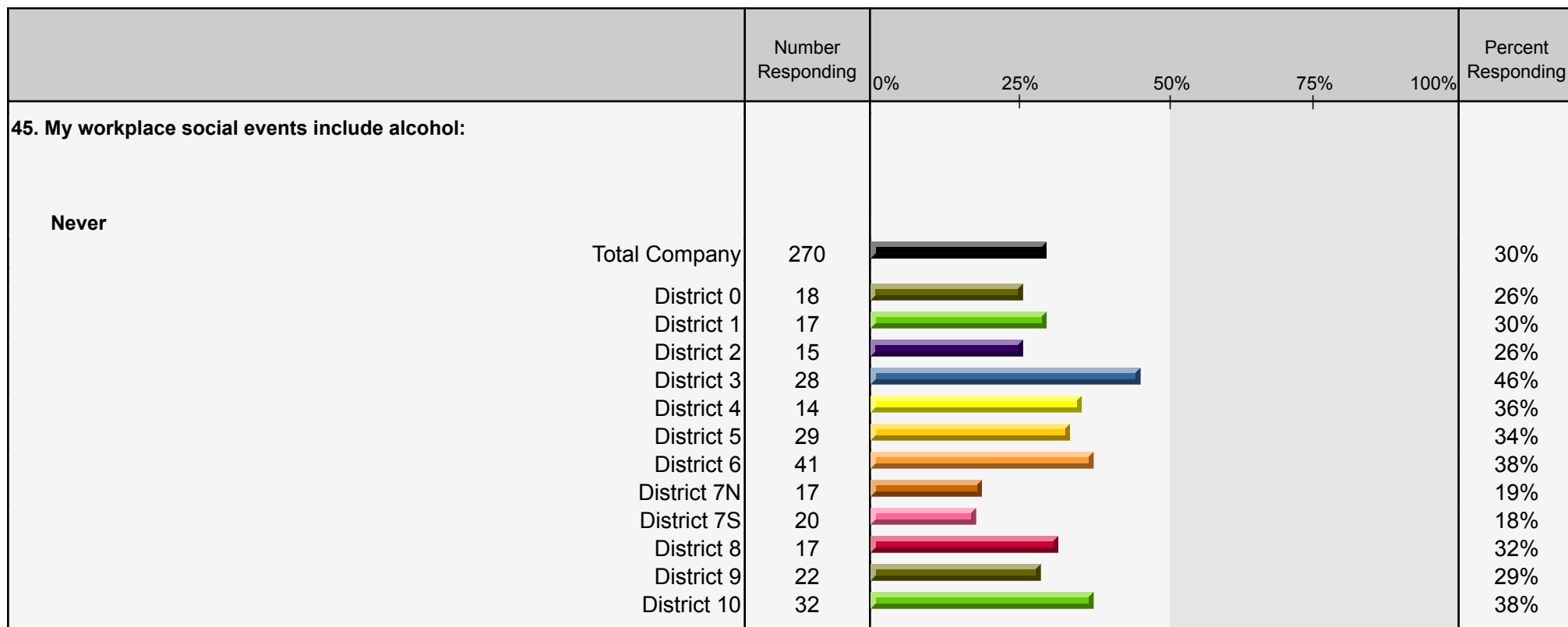
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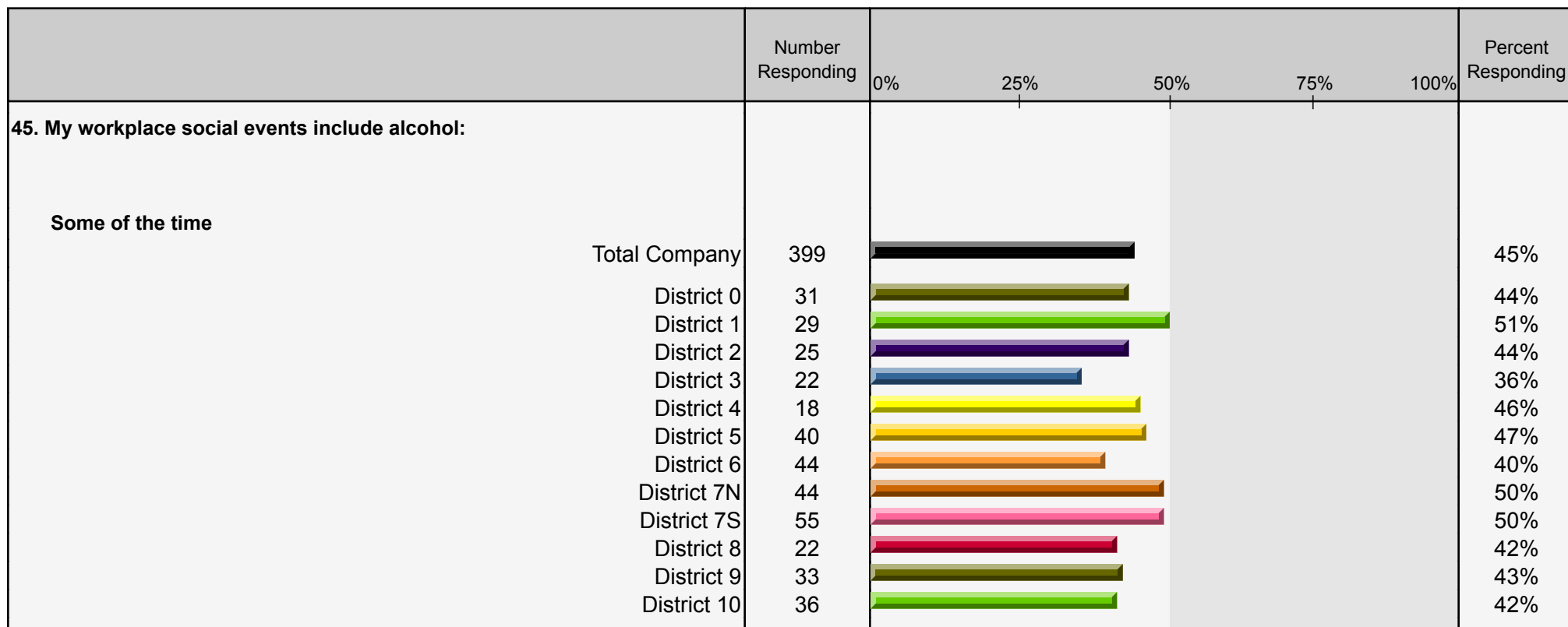
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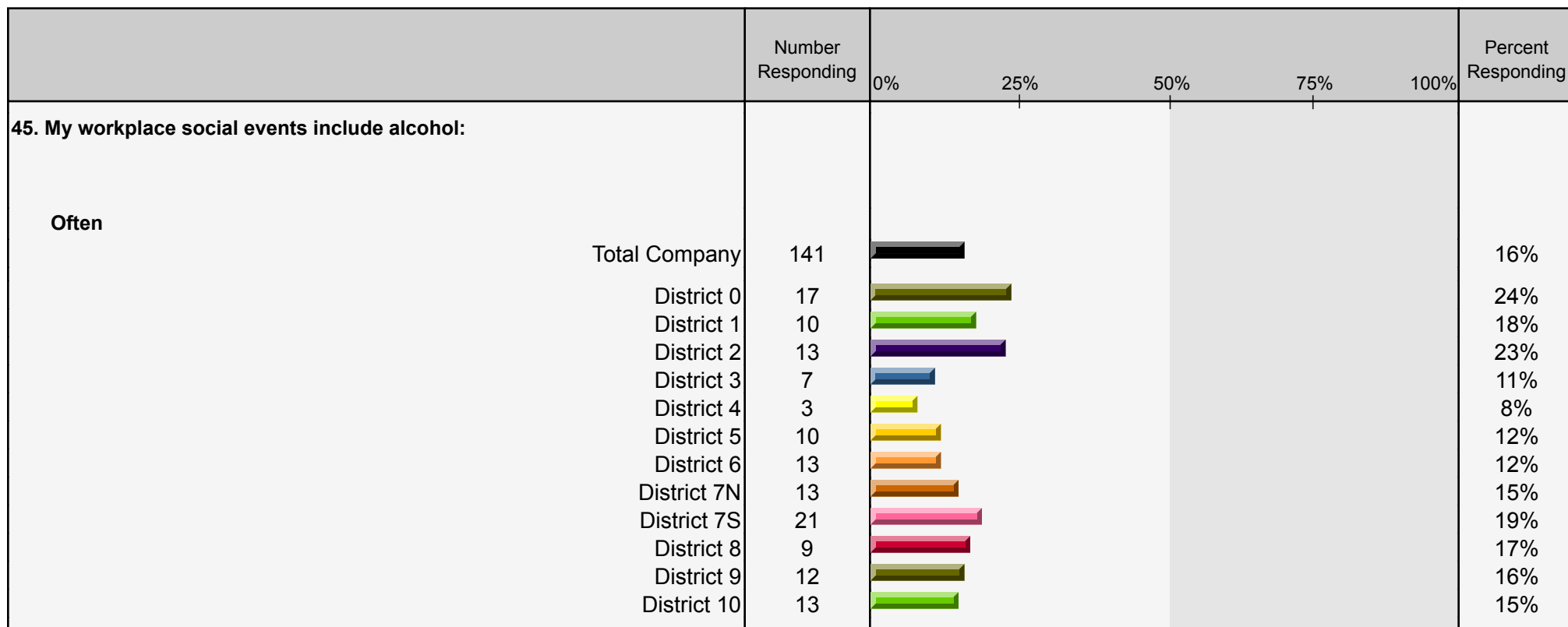
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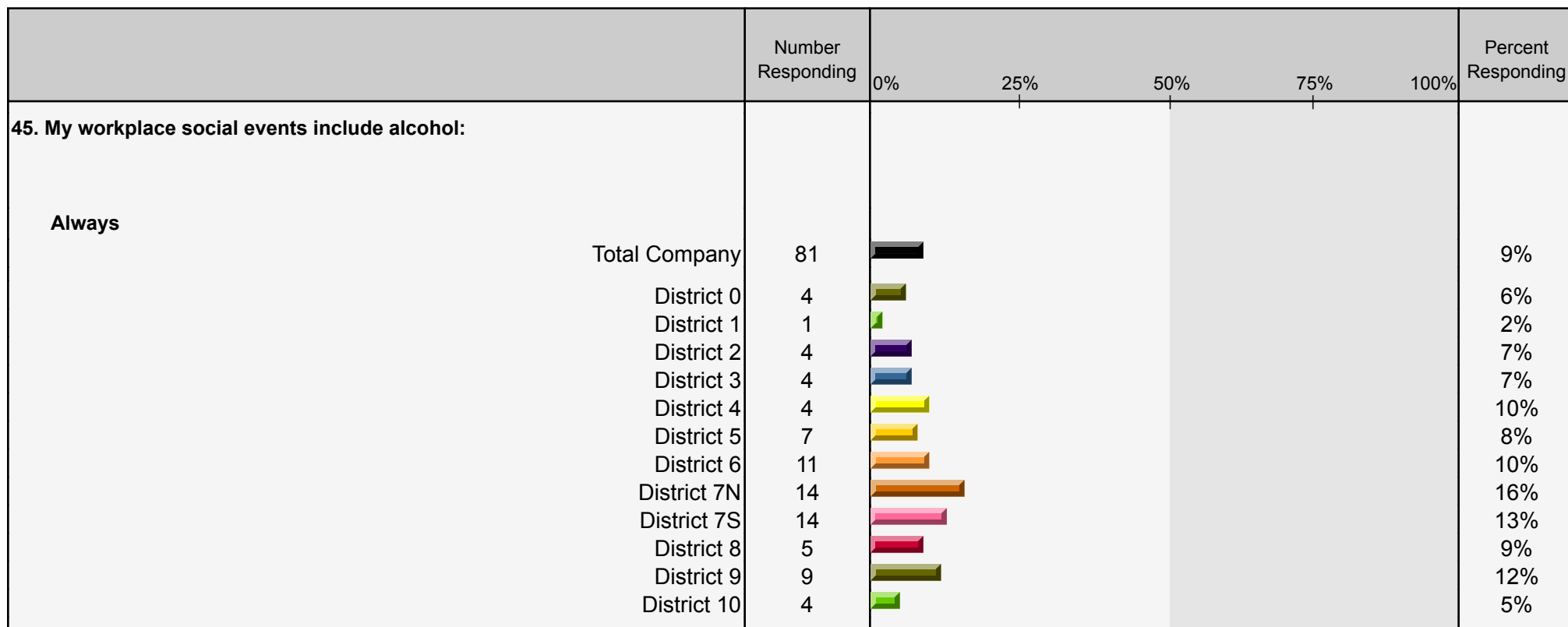
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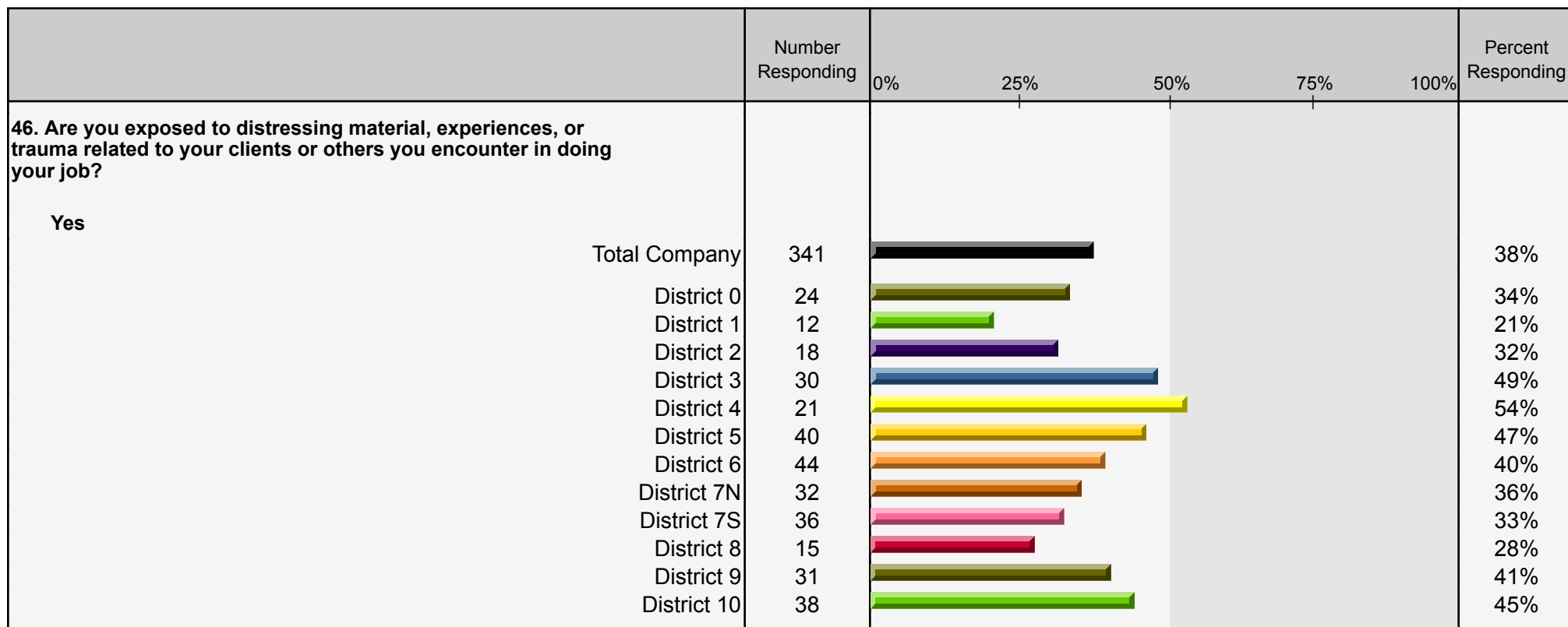
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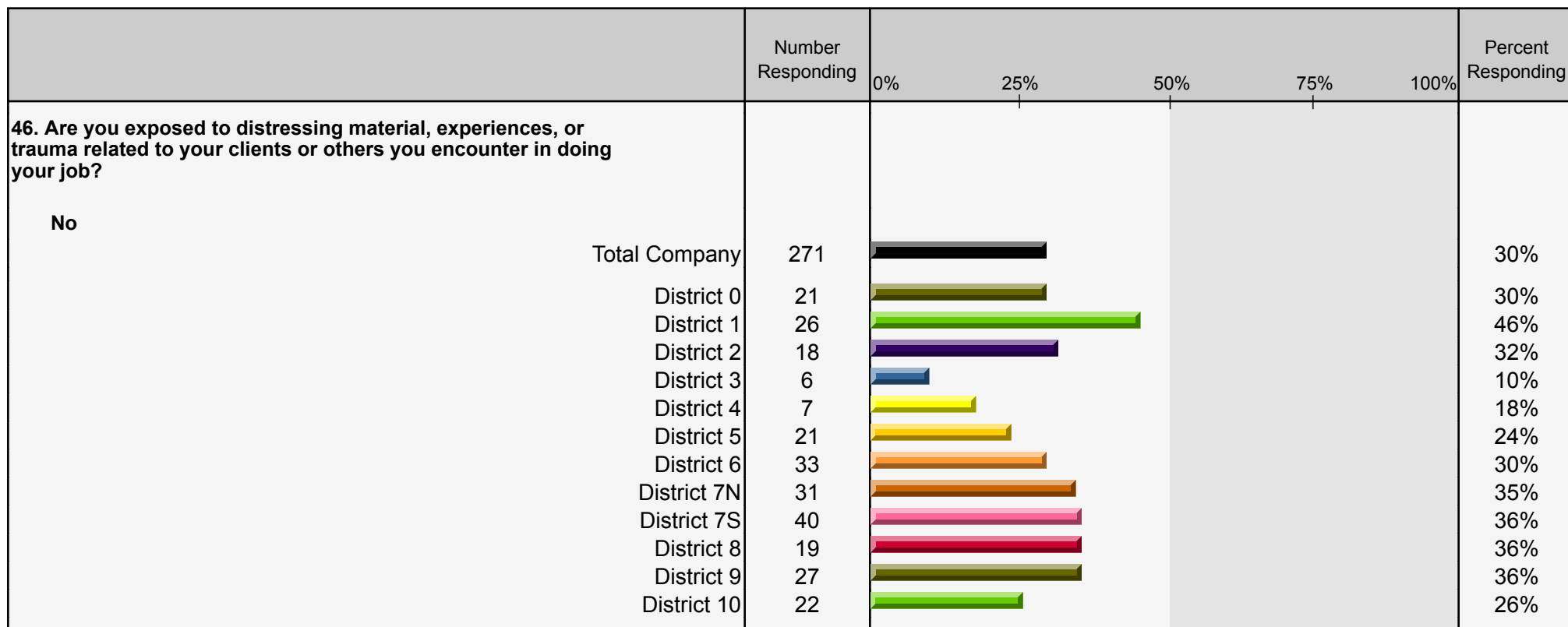
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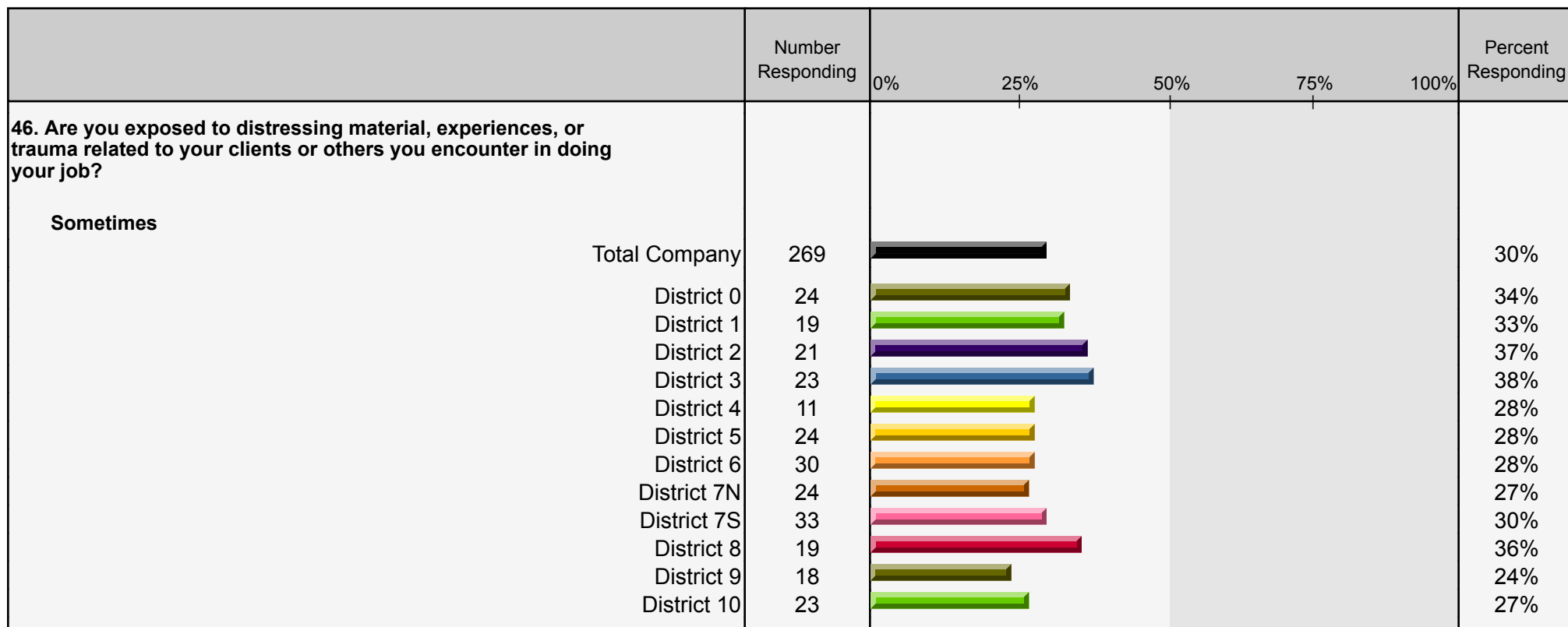
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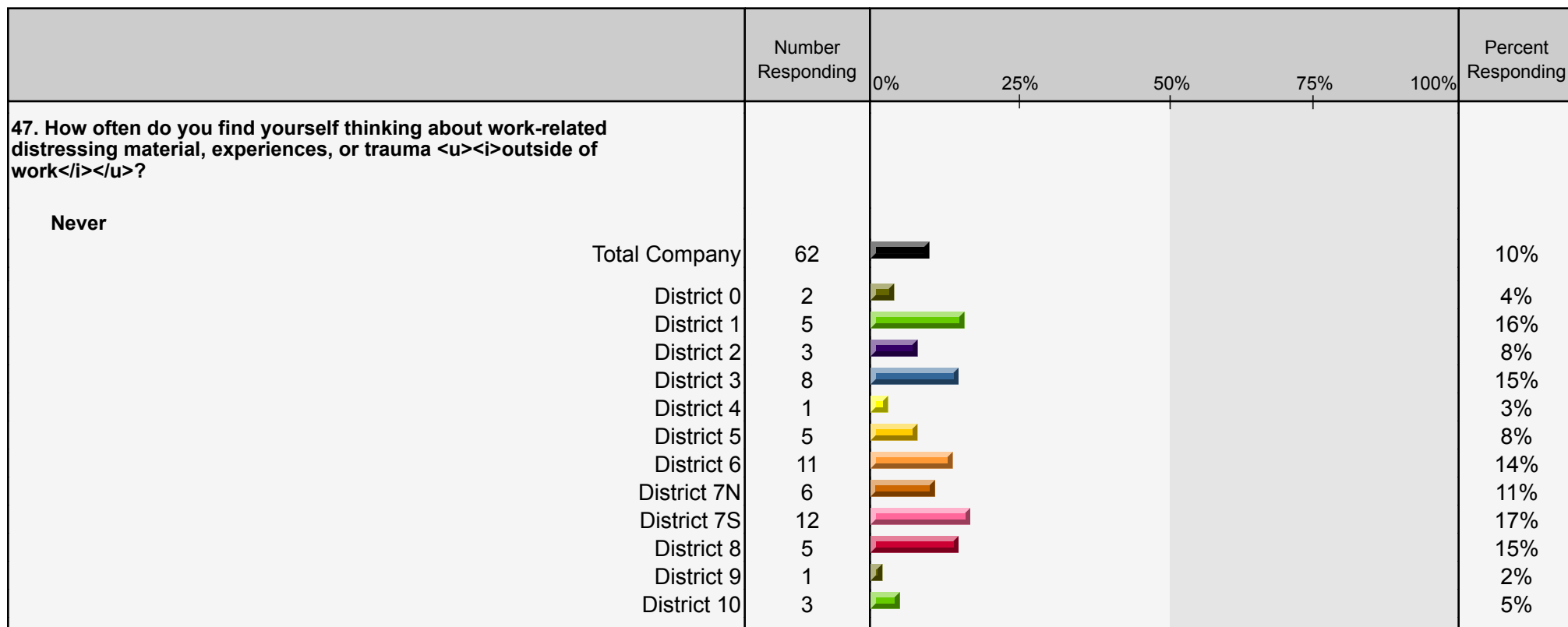
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		Number Responding	0%	25%	50%	75%	100%	Percent Responding
46. Are you exposed to distressing material, experiences, or trauma related to your clients or others you encounter in doing your job?								
Unsure								
	Total Company	10						1%
	District 0	1						1%
	District 1	0	No valid cases					0%
	District 2	0	No valid cases					0%
	District 3	2						3%
	District 4	0	No valid cases					0%
	District 5	1						1%
	District 6	2						2%
	District 7N	1						1%
	District 7S	1						1%
	District 8	0	No valid cases					0%
	District 9	0	No valid cases					0%
	District 10	2						2%

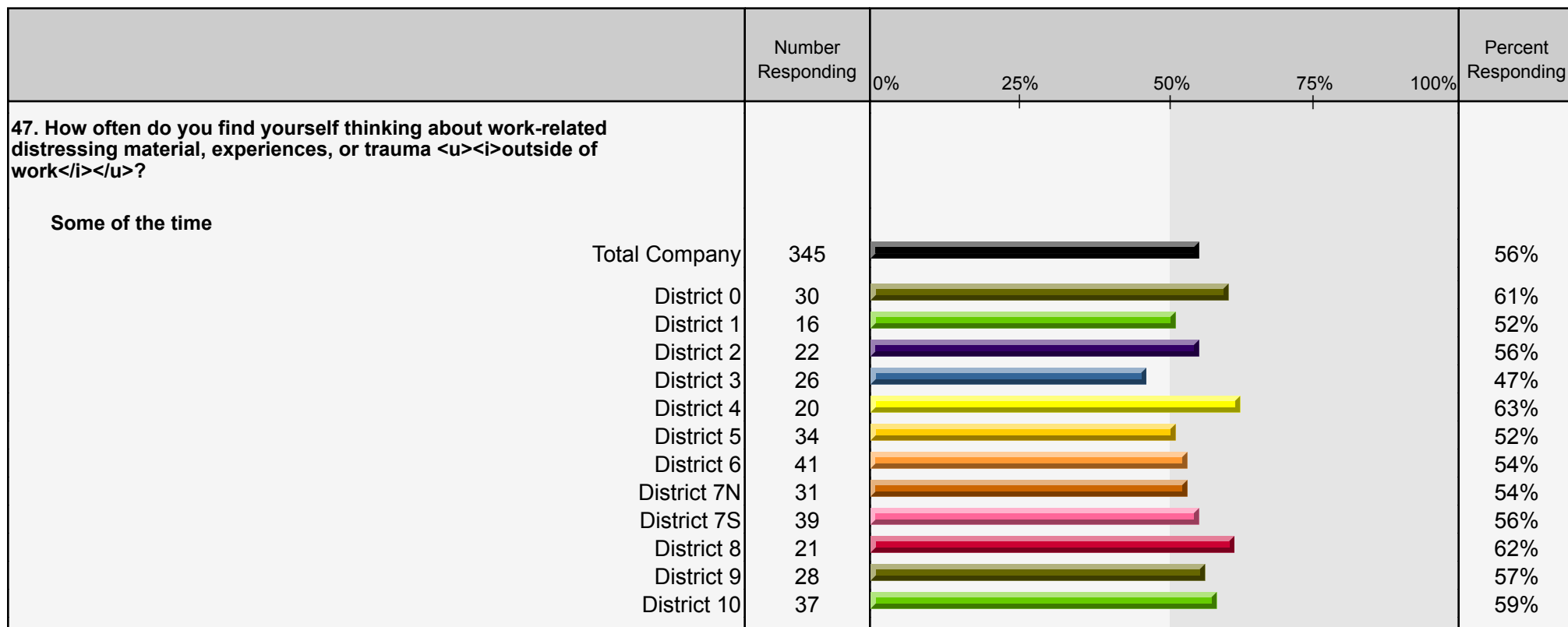
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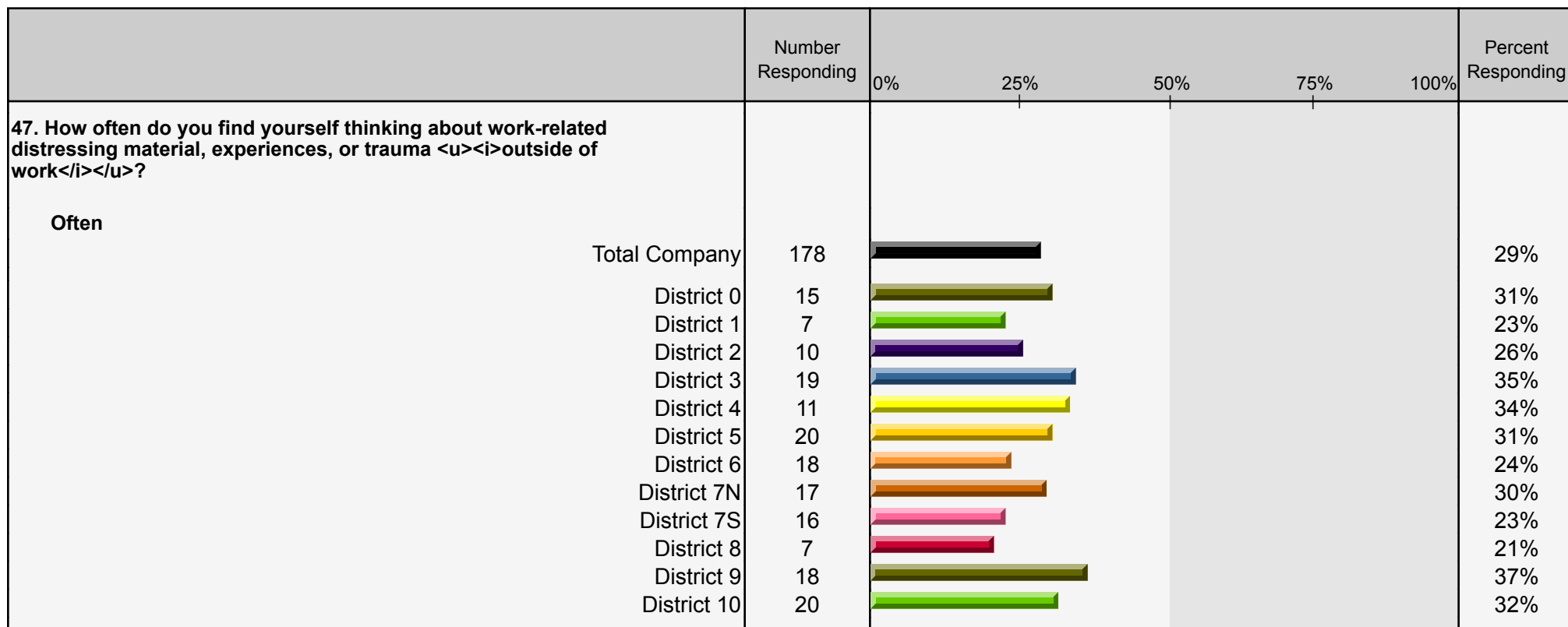
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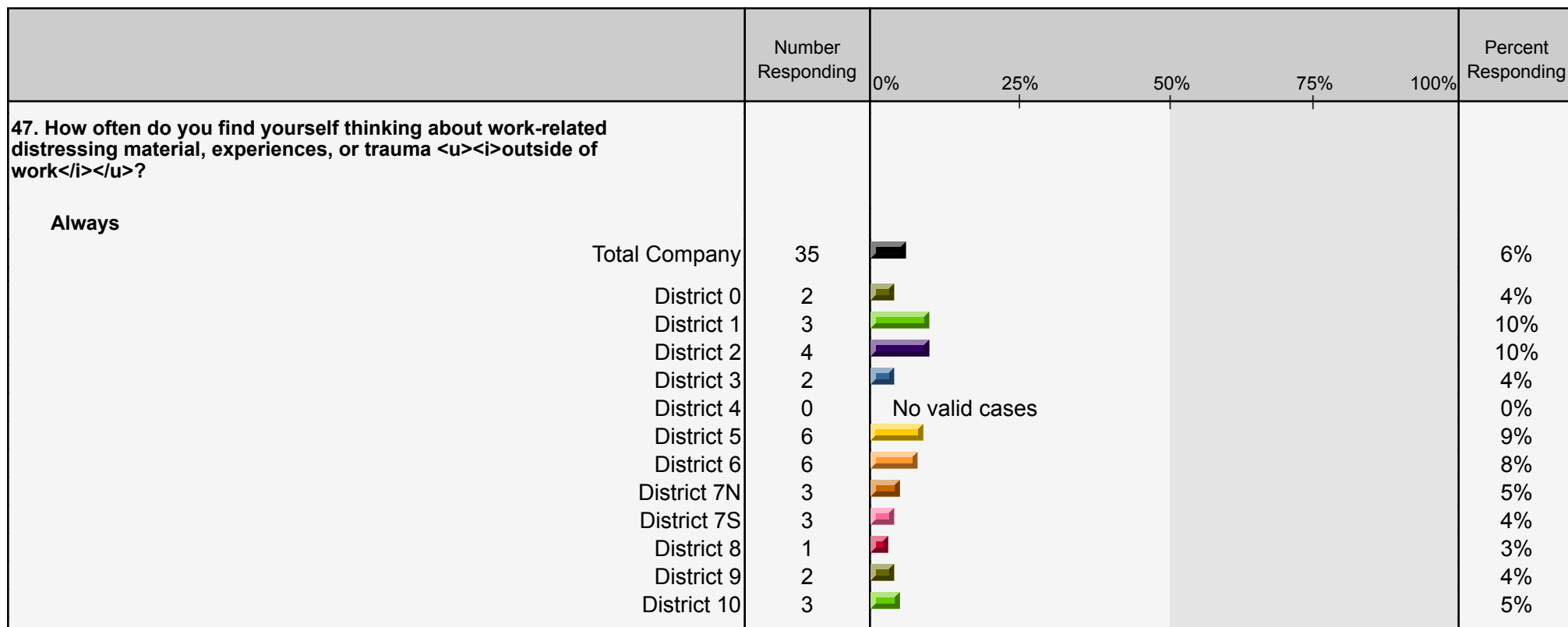
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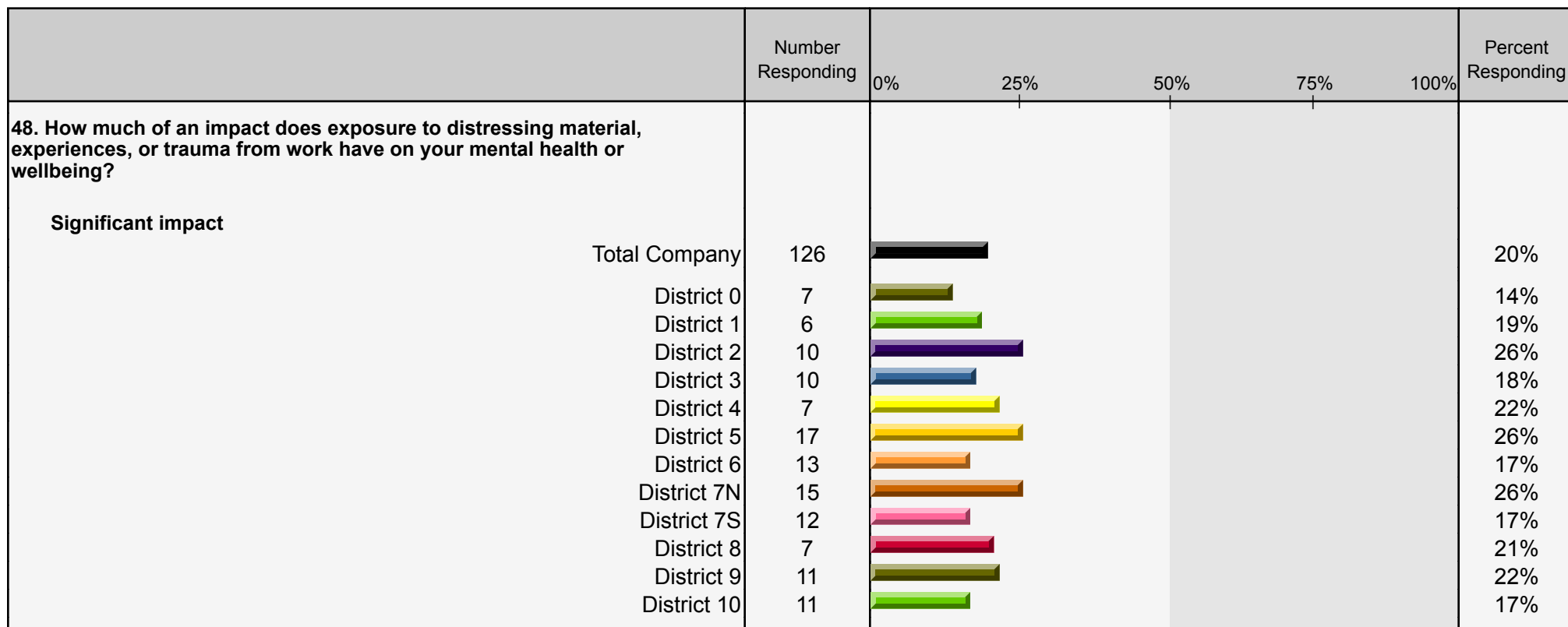
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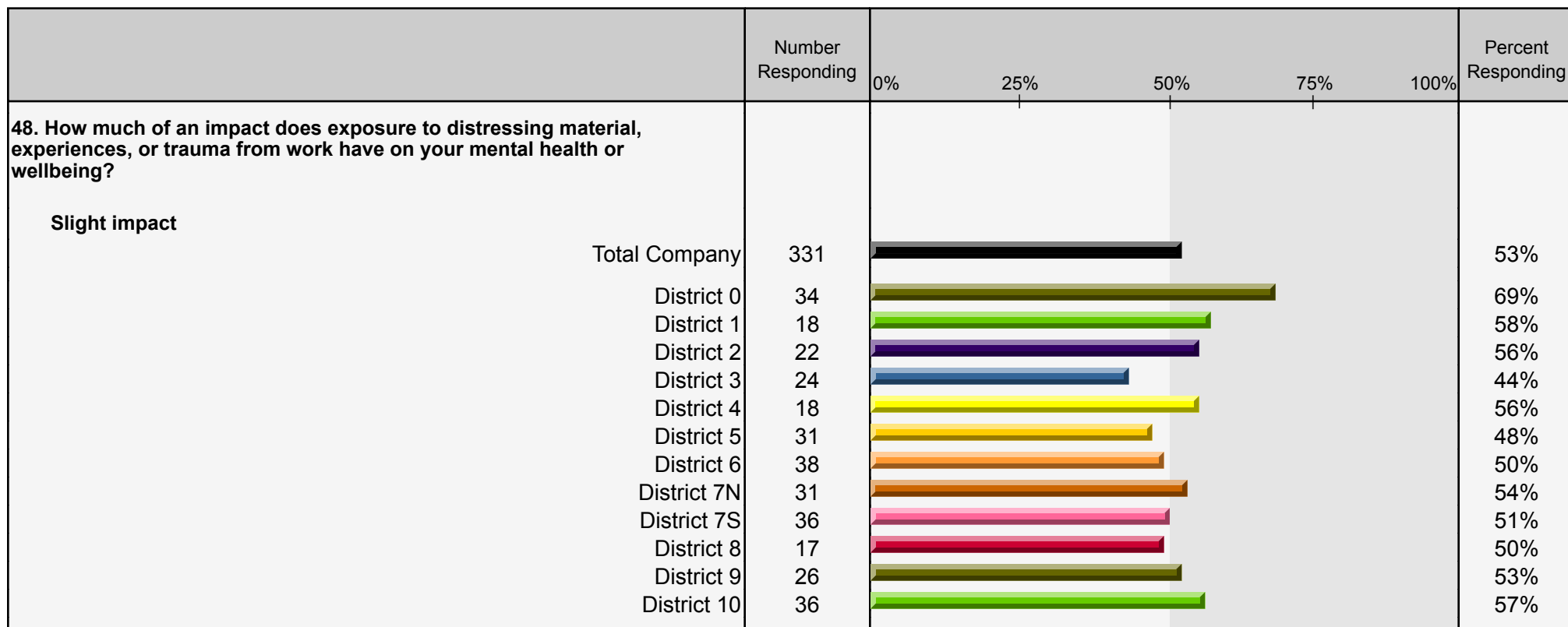
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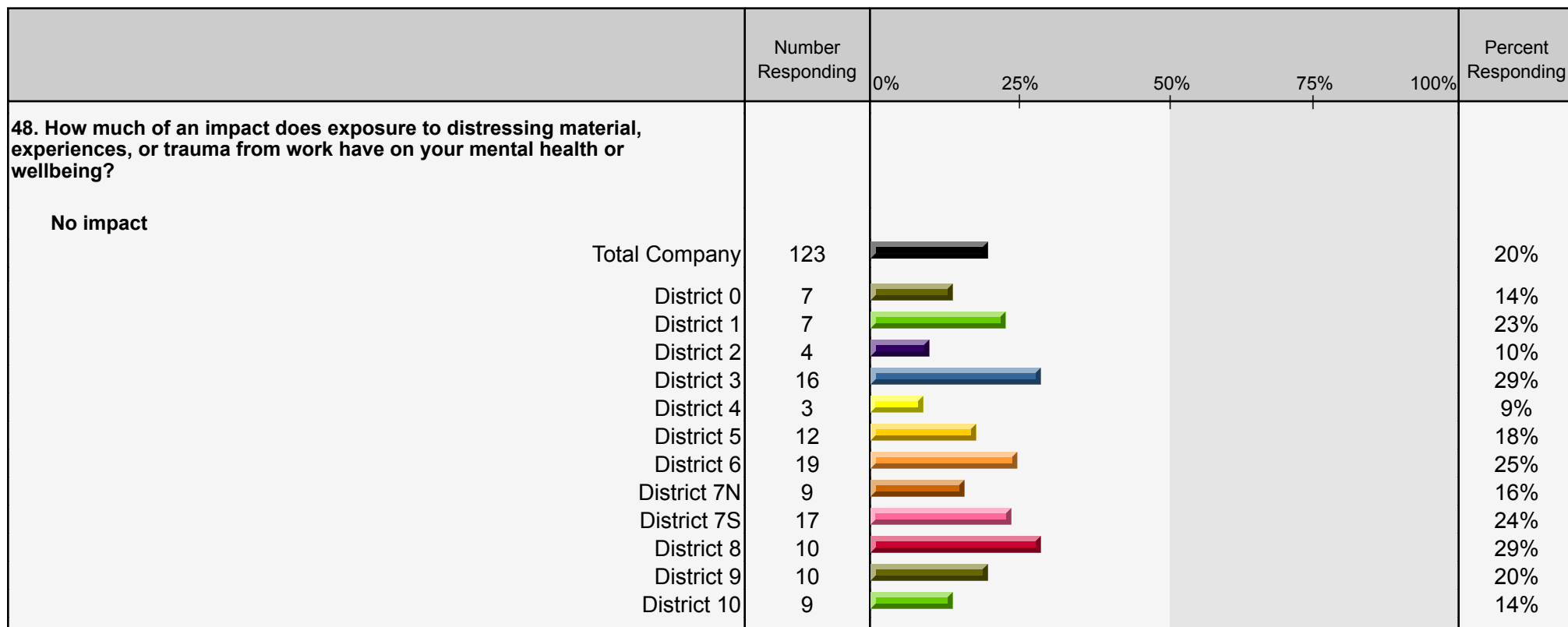
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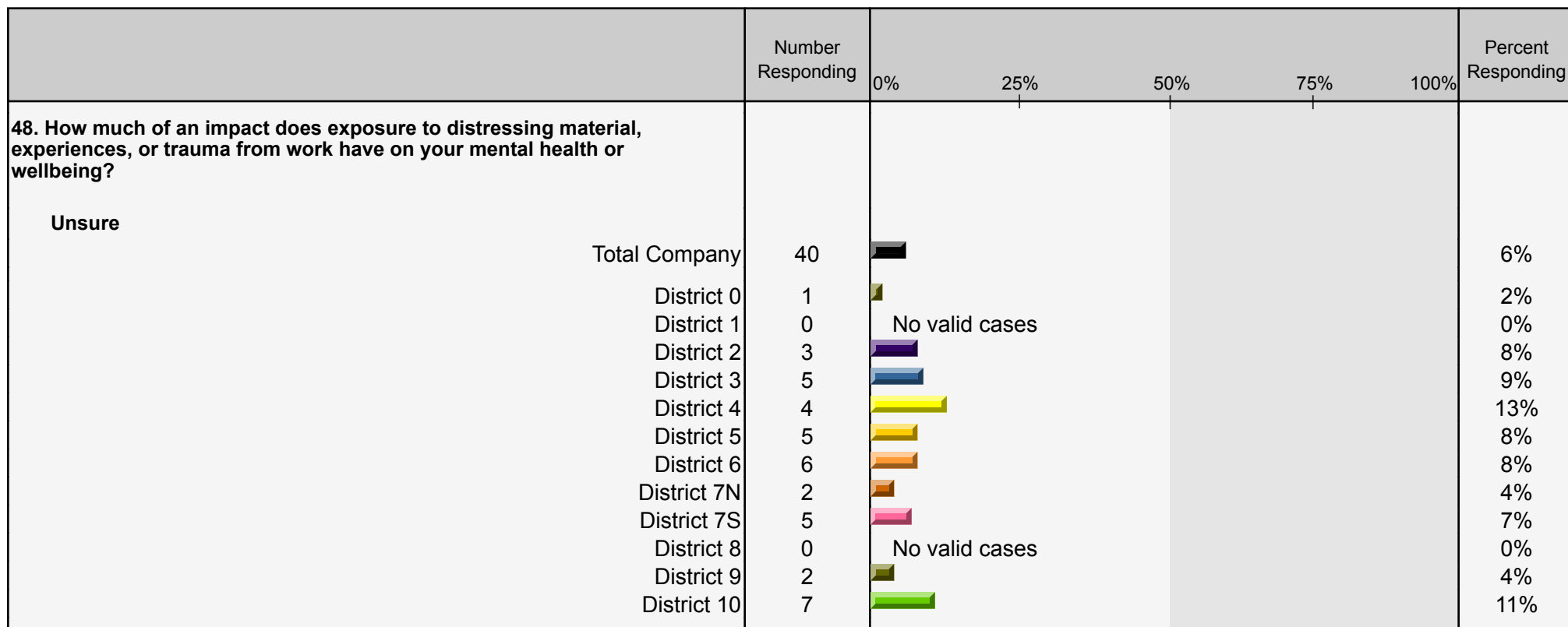
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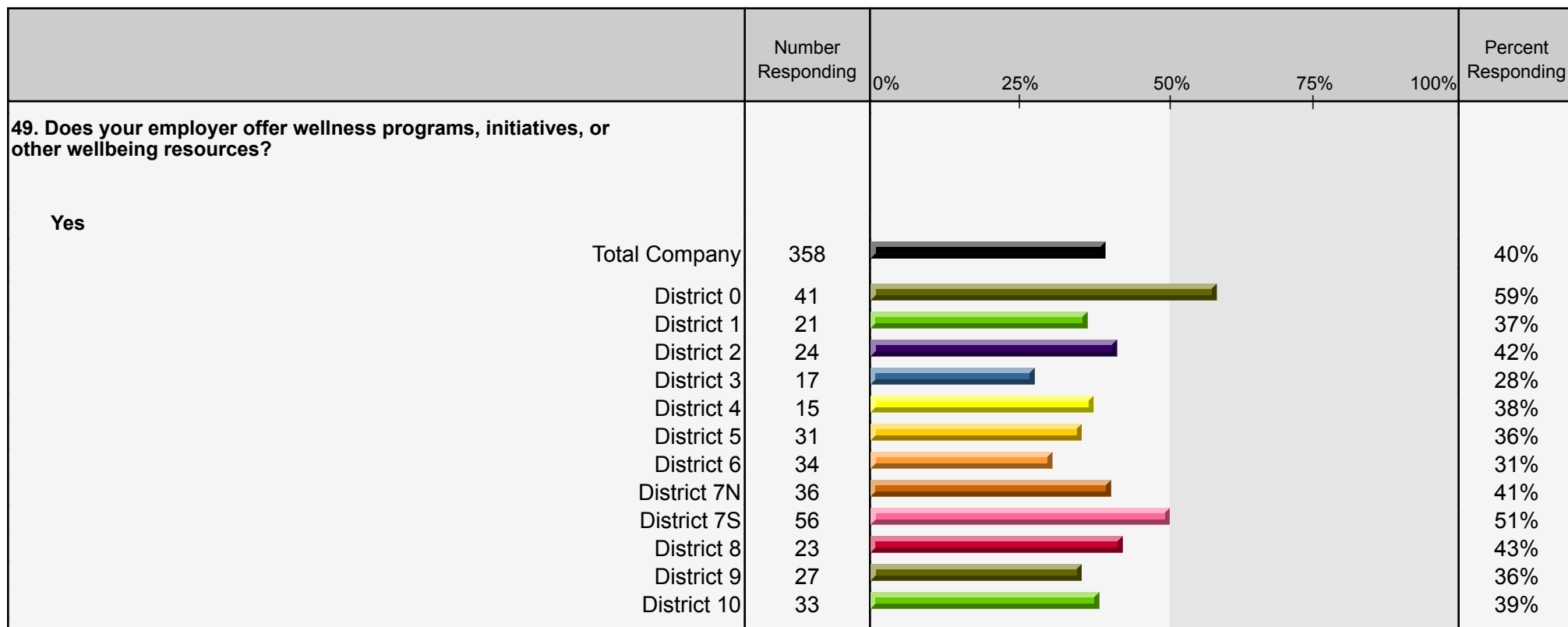
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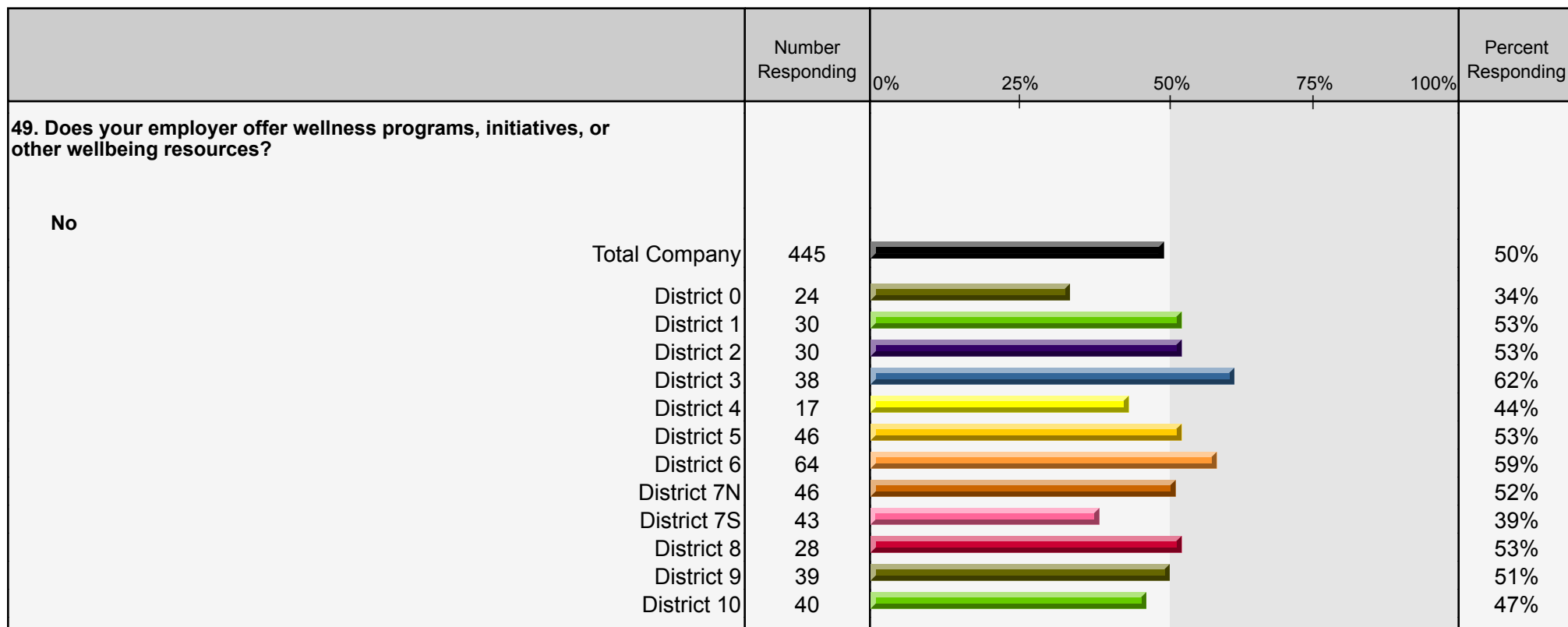
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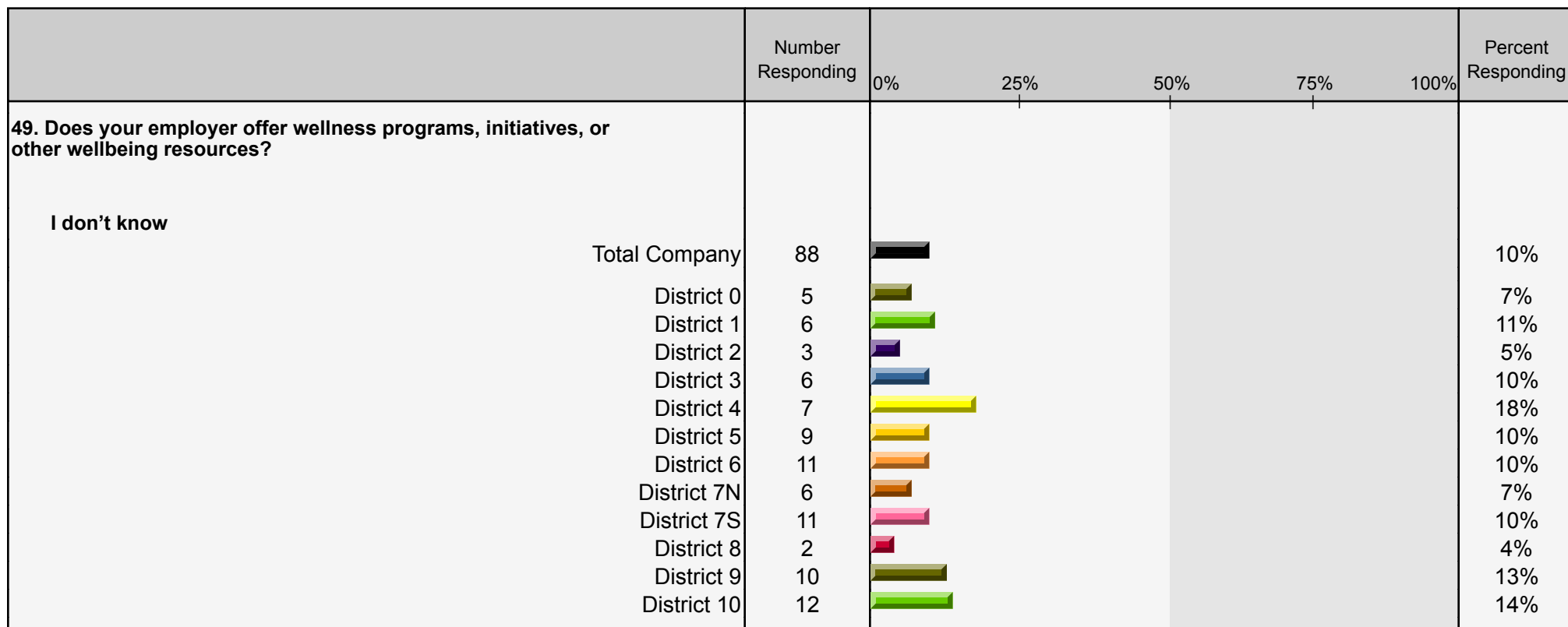
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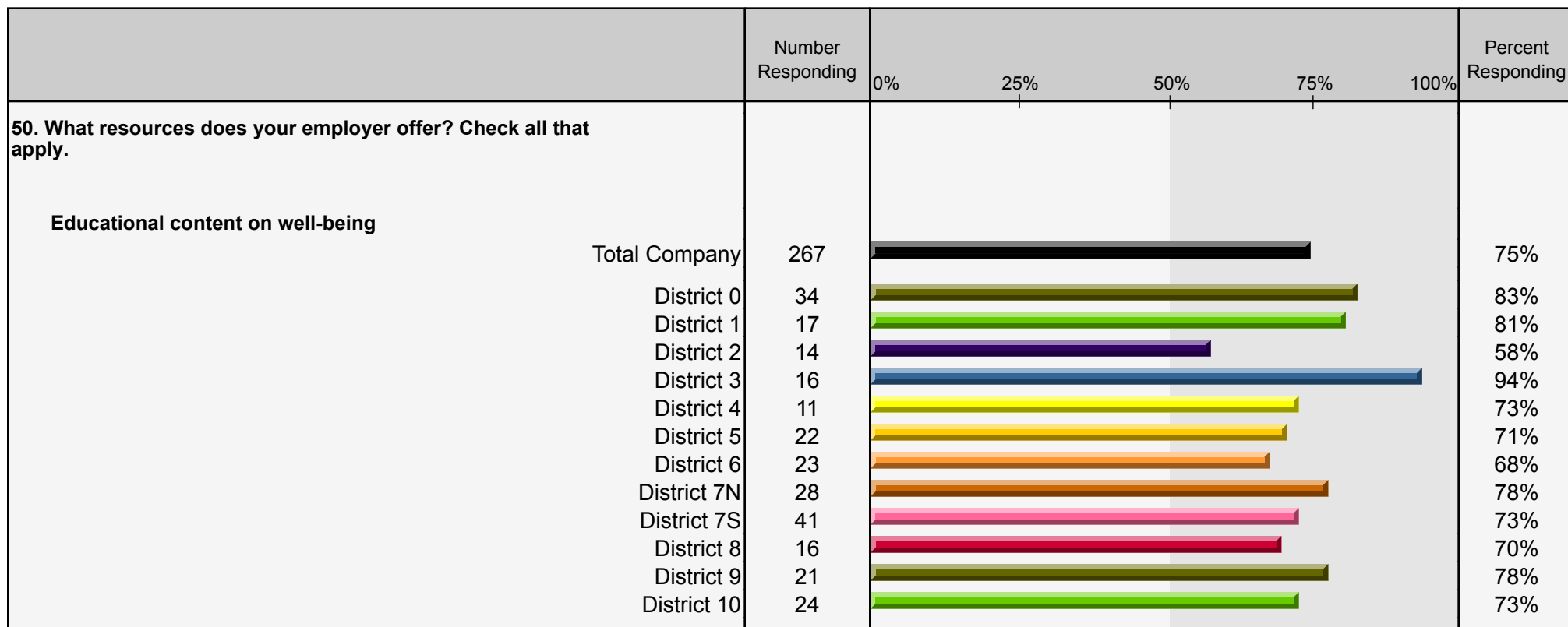
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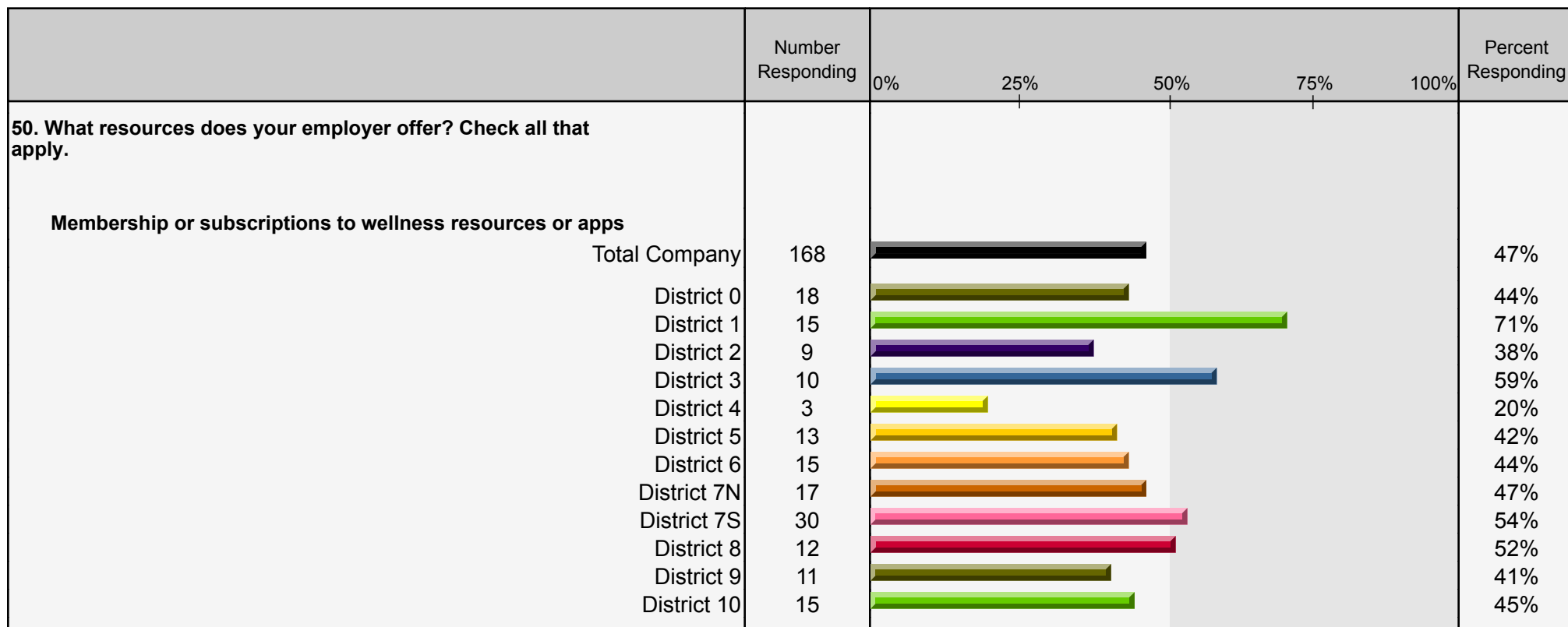
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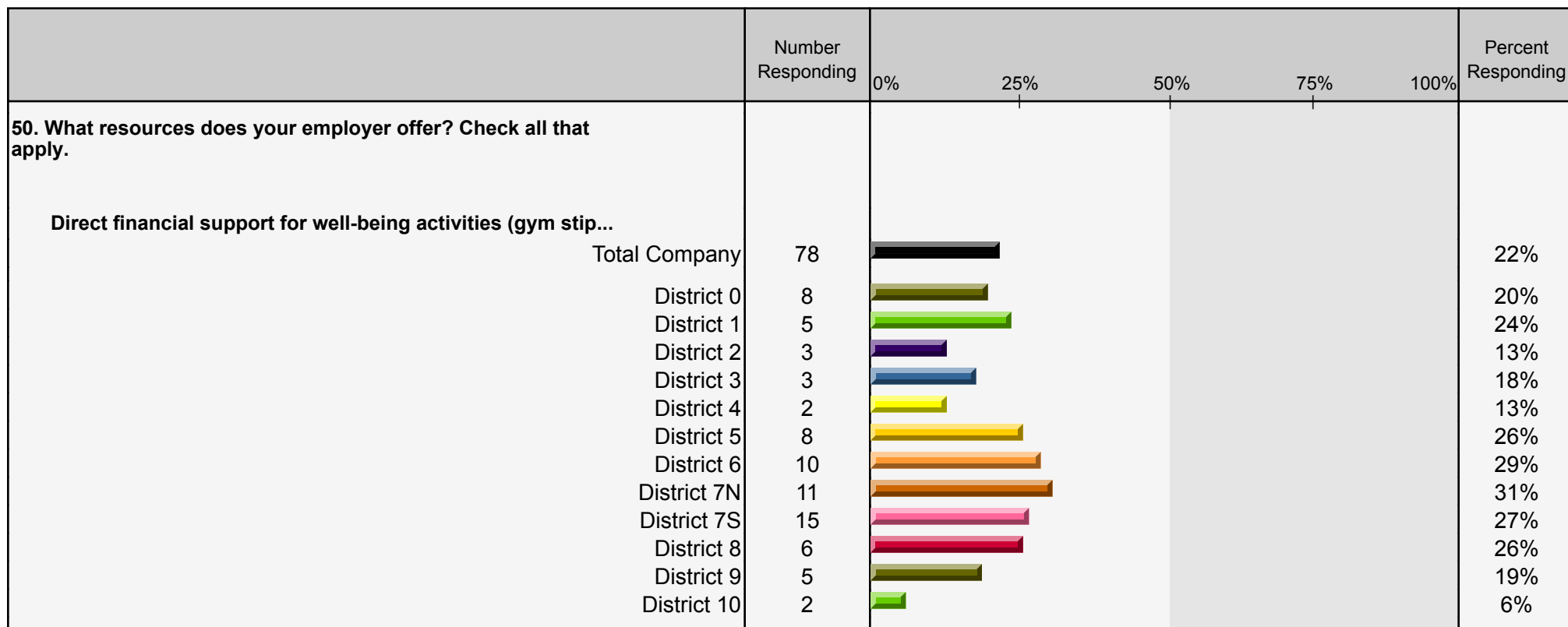
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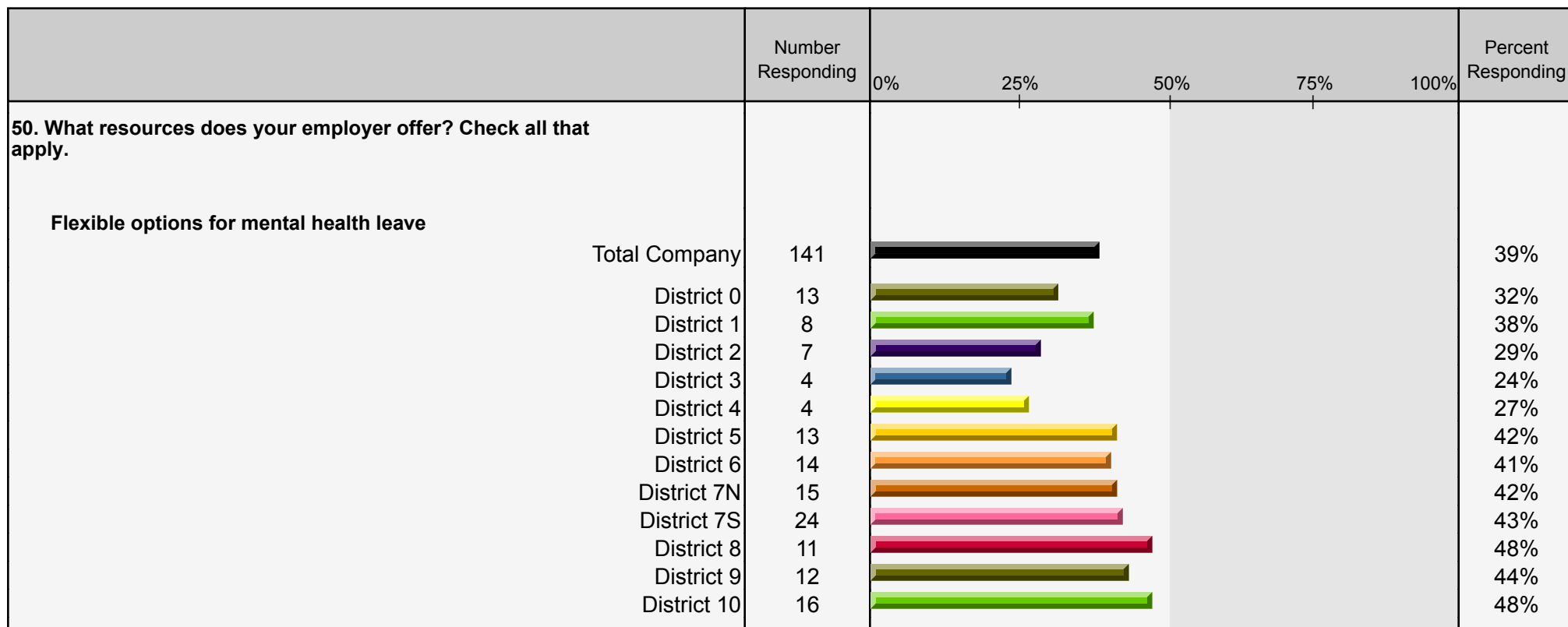
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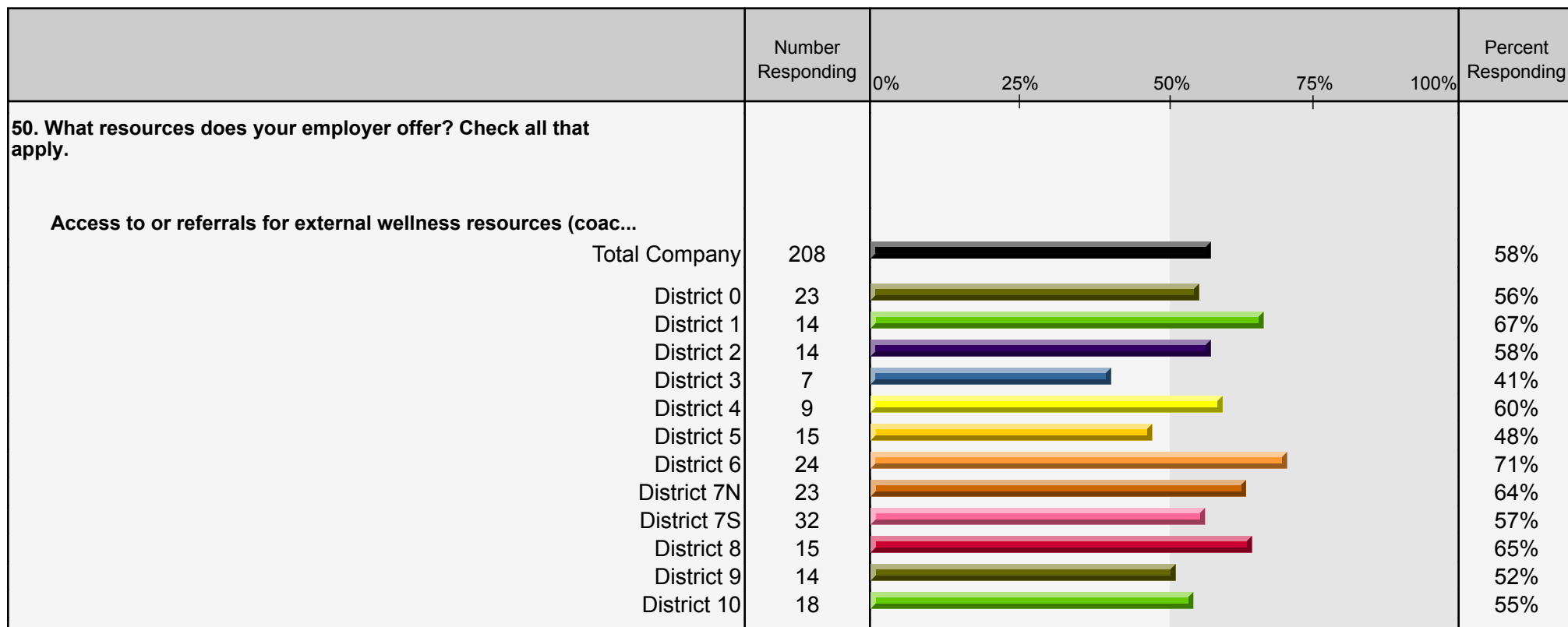
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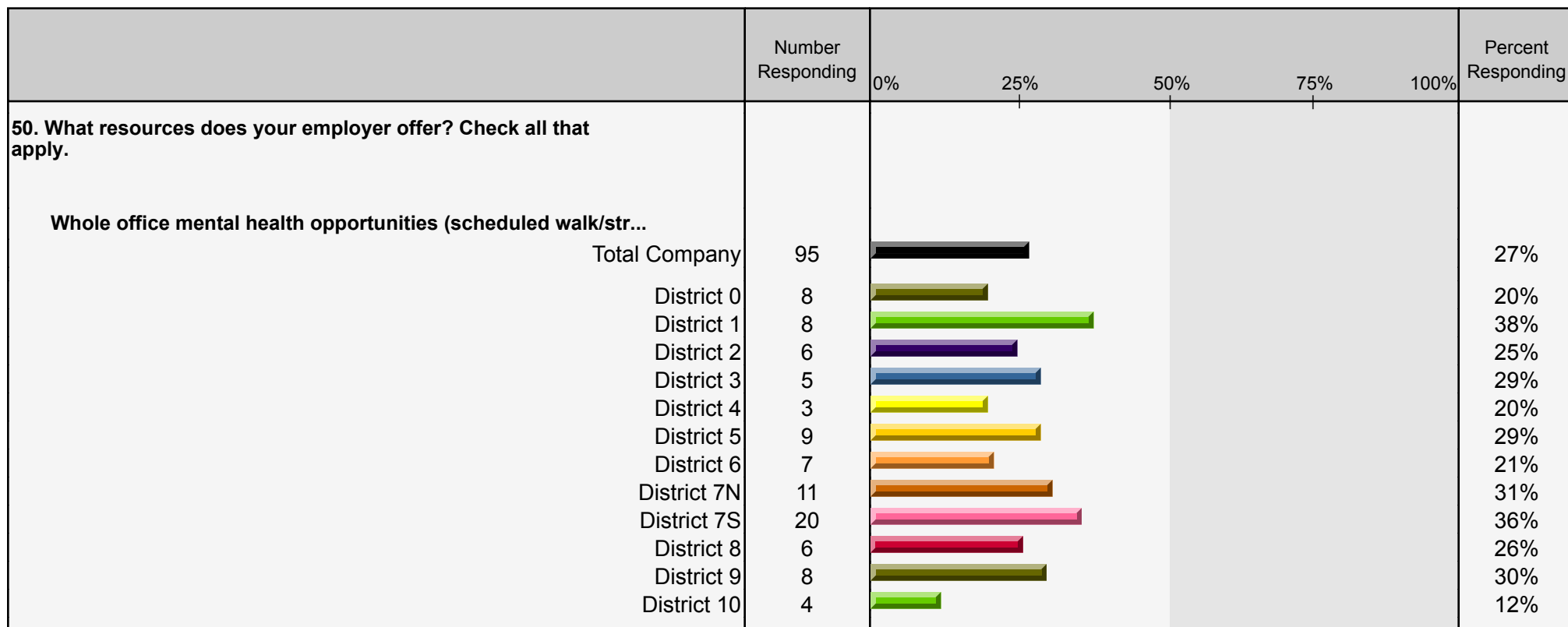
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



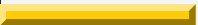




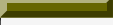

Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



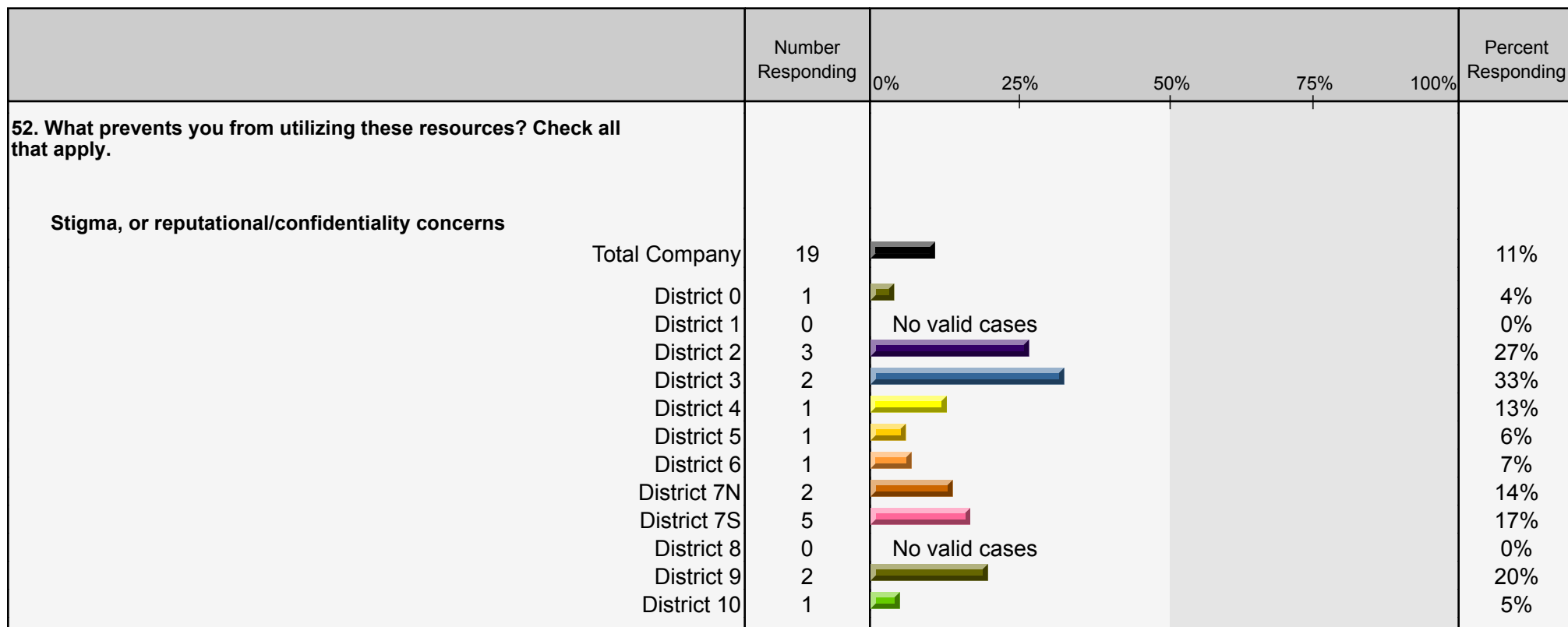
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

	Number Responding	0%25%50%75%100%	Percent Responding
50. What resources does your employer offer? Check all that apply.			
Other, please specify:			
Total Company	43		12%
District 0	5		12%
District 1	1		5%
District 2	3		13%
District 3	4		24%
District 4	0	No valid cases	0%
District 5	8		26%
District 6	2		6%
District 7N	5		14%
District 7S	6		11%
District 8	2		9%
District 9	4		15%
District 10	3		9%

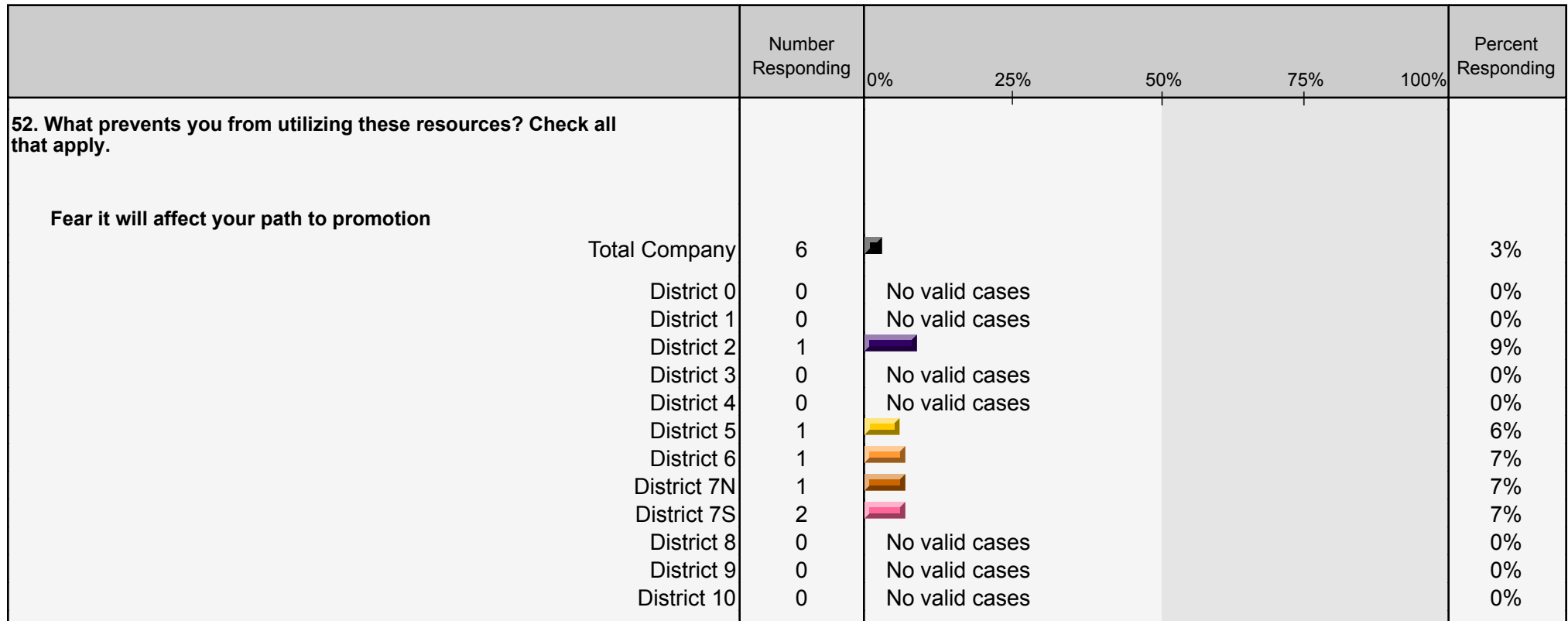
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



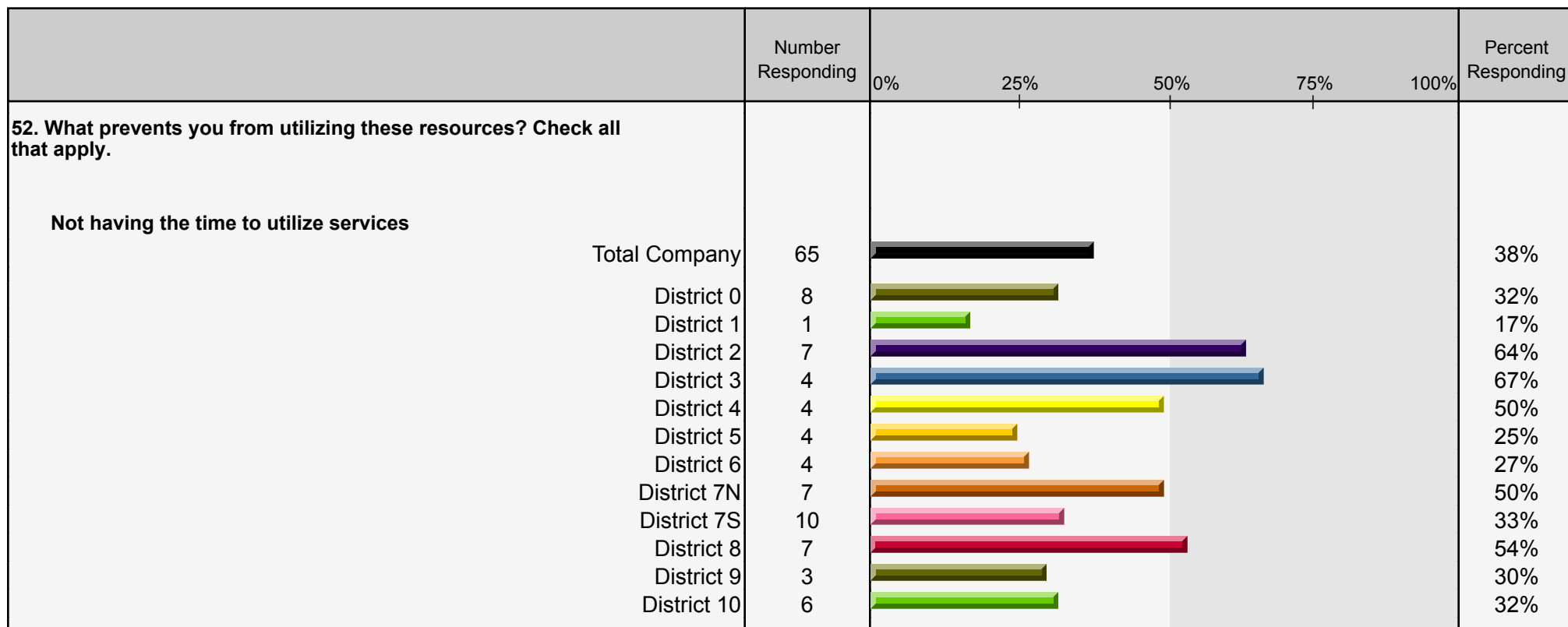
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



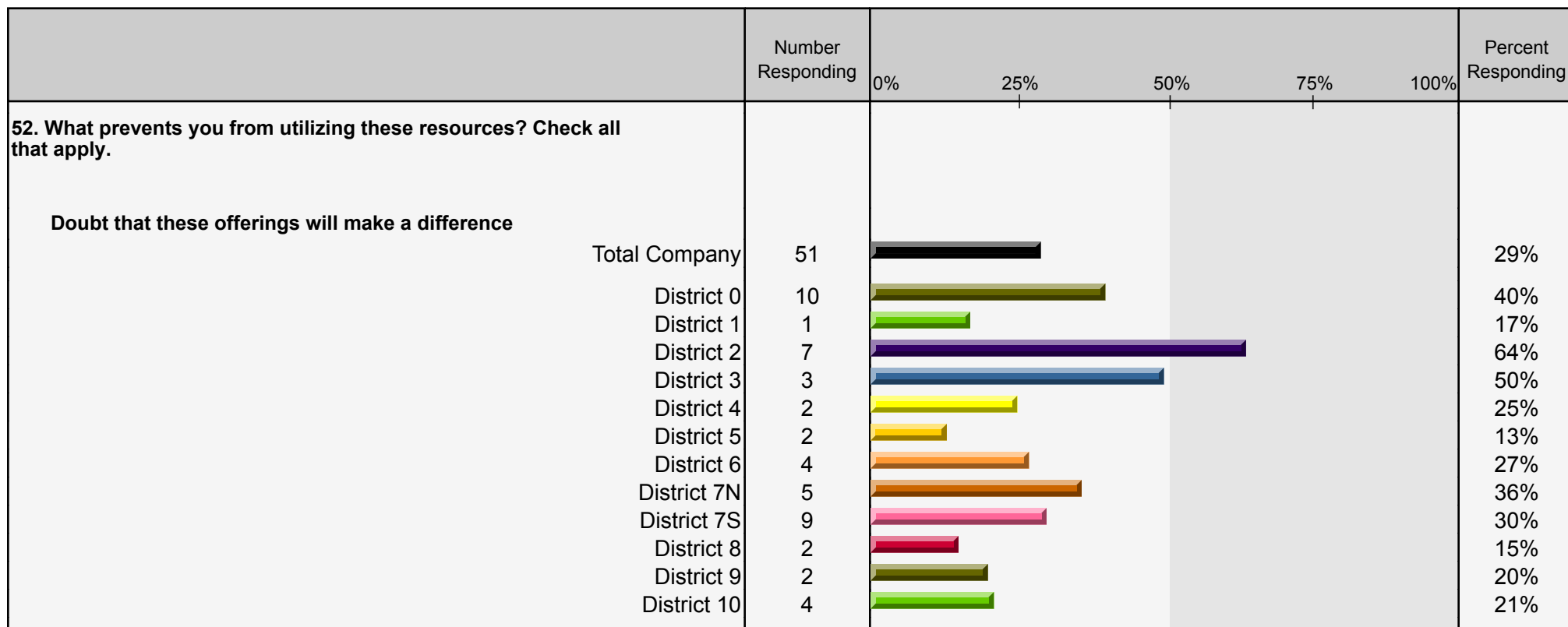
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



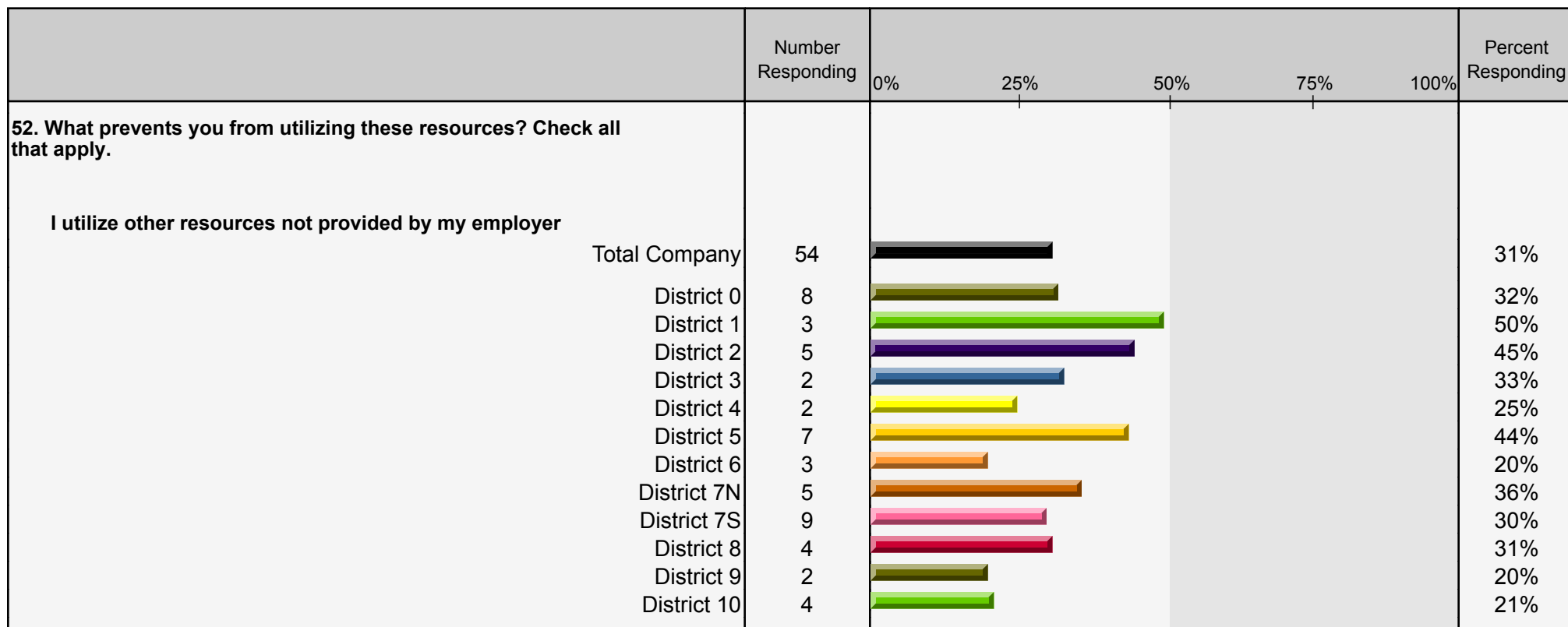
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific








Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



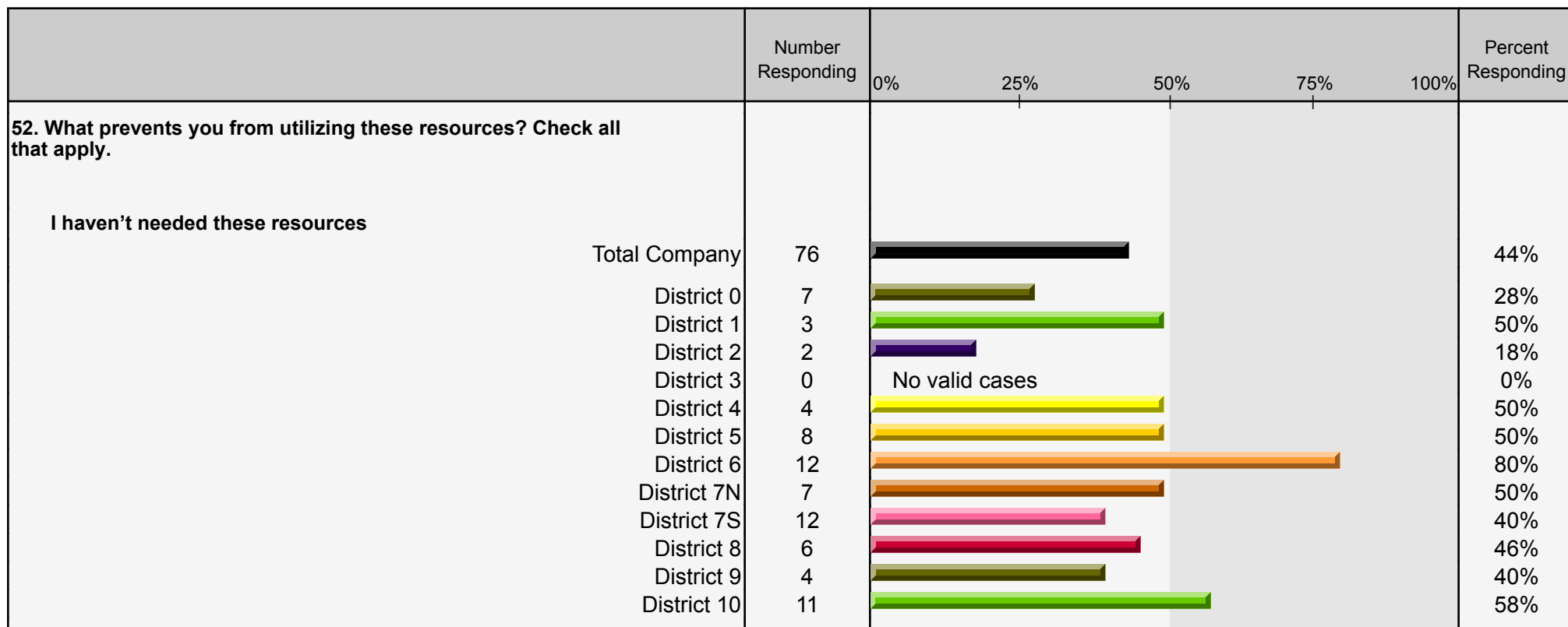
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

		Number Responding	0%25%50%75%100%	Percent Responding
52. What prevents you from utilizing these resources? Check all that apply.				
Too costly—financial or time away from work				
	Total Company	6		3%
	District 0	2		8%
	District 1	0	No valid cases	0%
	District 2	0	No valid cases	0%
	District 3	0	No valid cases	0%
	District 4	0	No valid cases	0%
	District 5	0	No valid cases	0%
	District 6	0	No valid cases	0%
	District 7N	0	No valid cases	0%
	District 7S	2		7%
	District 8	1		8%
	District 9	1		10%
	District 10	0	No valid cases	0%








Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



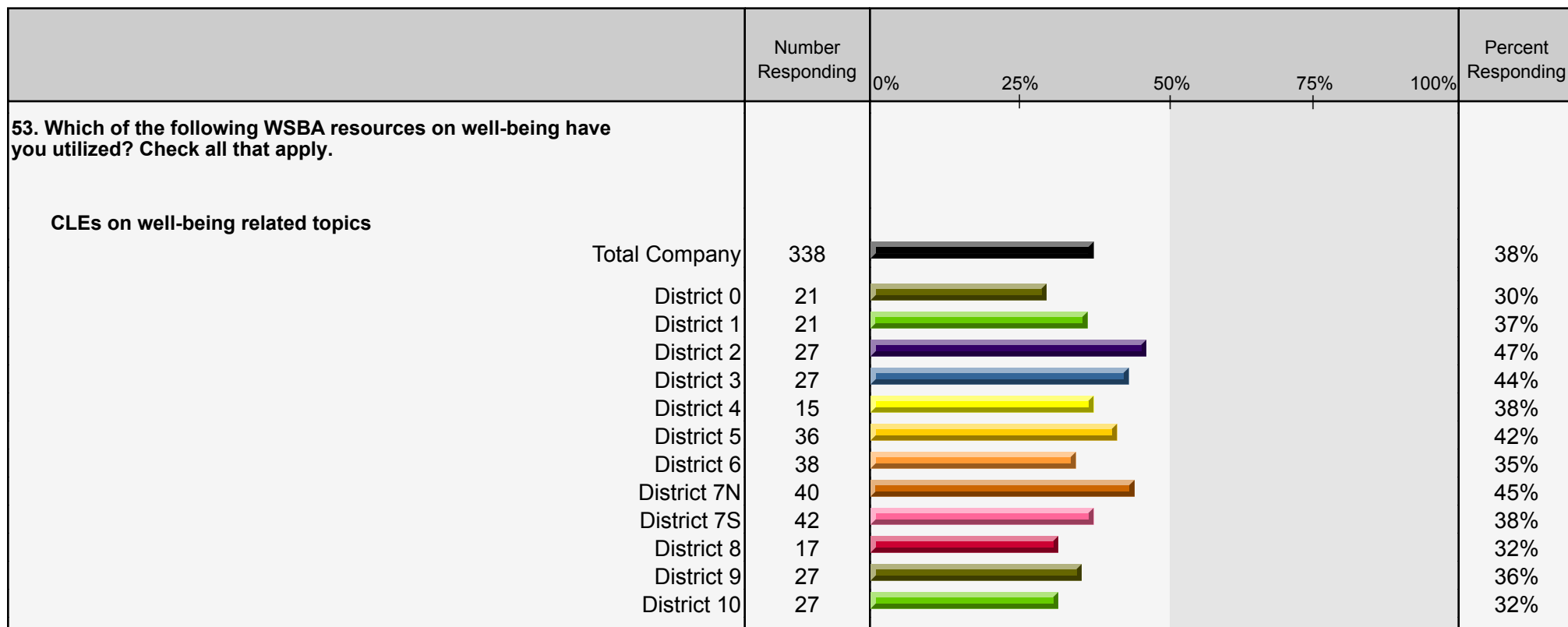
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

	Number Responding	0%25%50%75%100%	Percent Responding
52. What prevents you from utilizing these resources? Check all that apply.			
Other, please specify:			
Total Company	8		5%
District 0	2		8%
District 1	0	No valid cases	0%
District 2	1		9%
District 3	0	No valid cases	0%
District 4	0	No valid cases	0%
District 5	1		6%
District 6	1		7%
District 7N	0	No valid cases	0%
District 7S	0	No valid cases	0%
District 8	1		8%
District 9	0	No valid cases	0%
District 10	2		11%

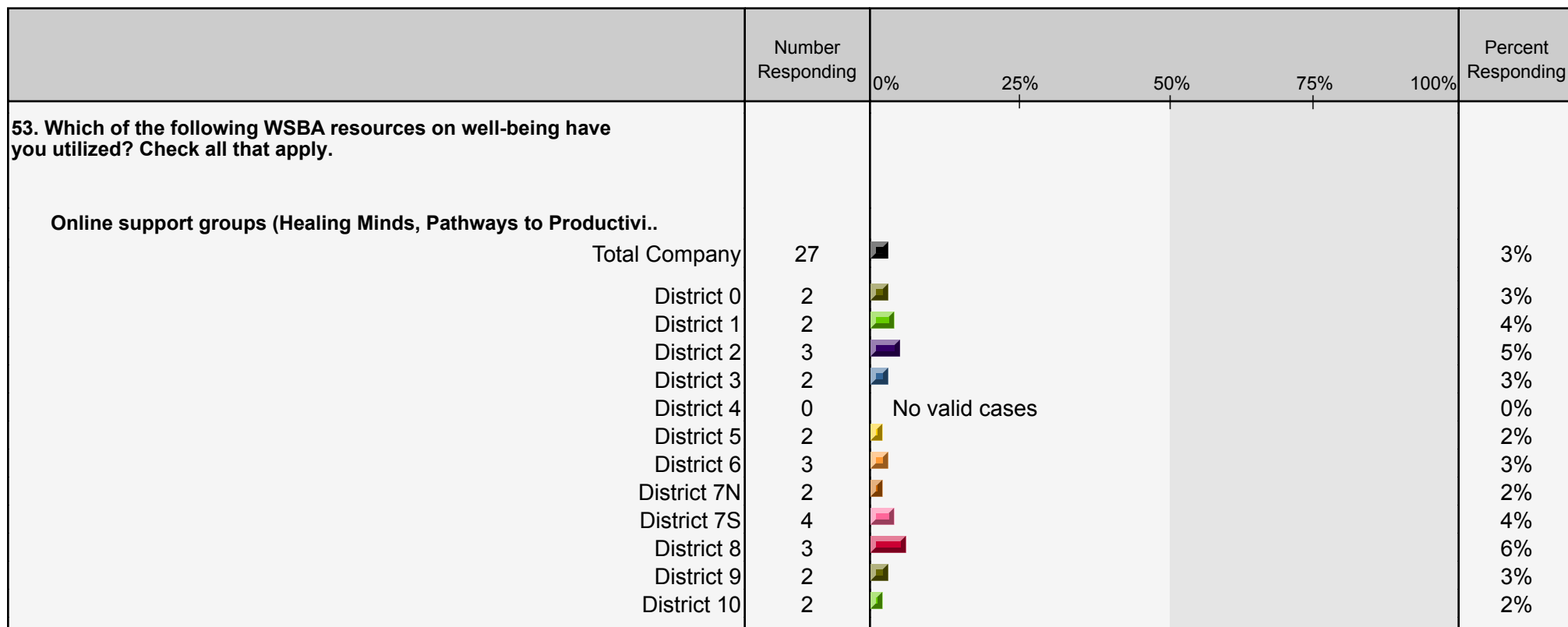
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



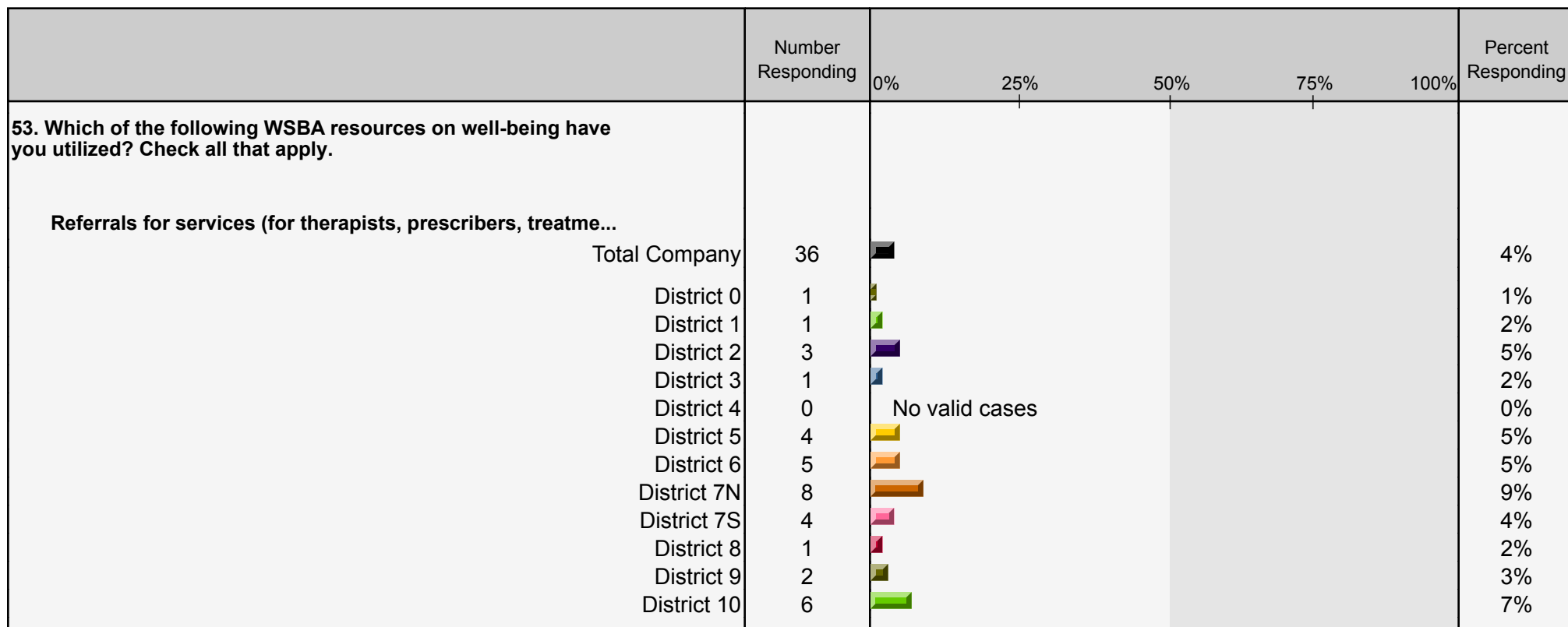
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



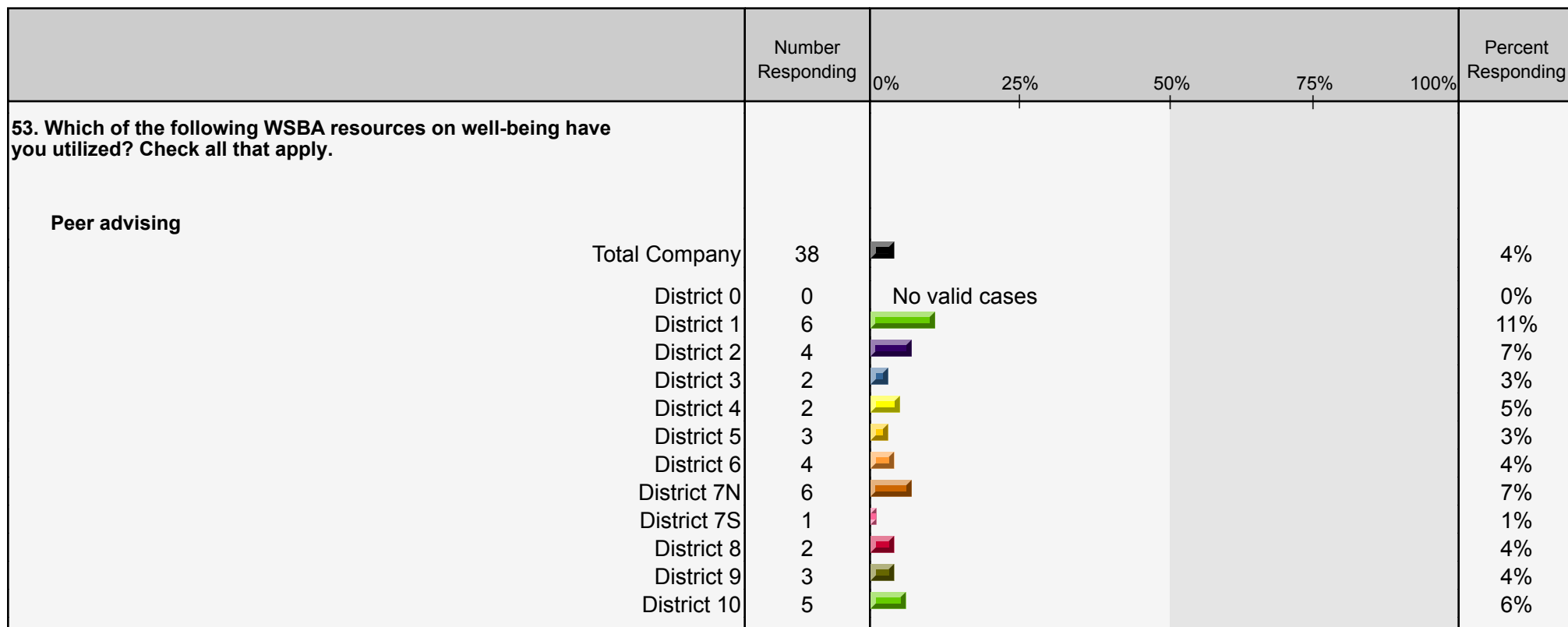
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



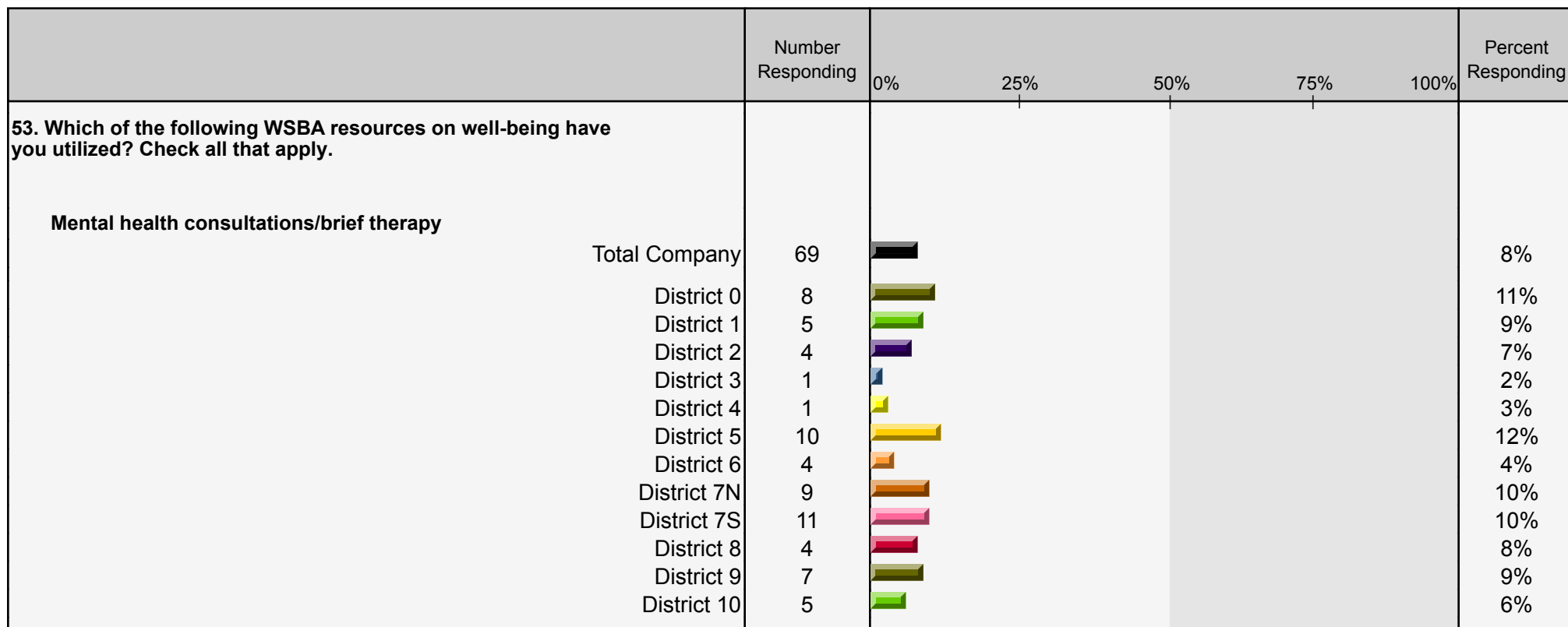
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



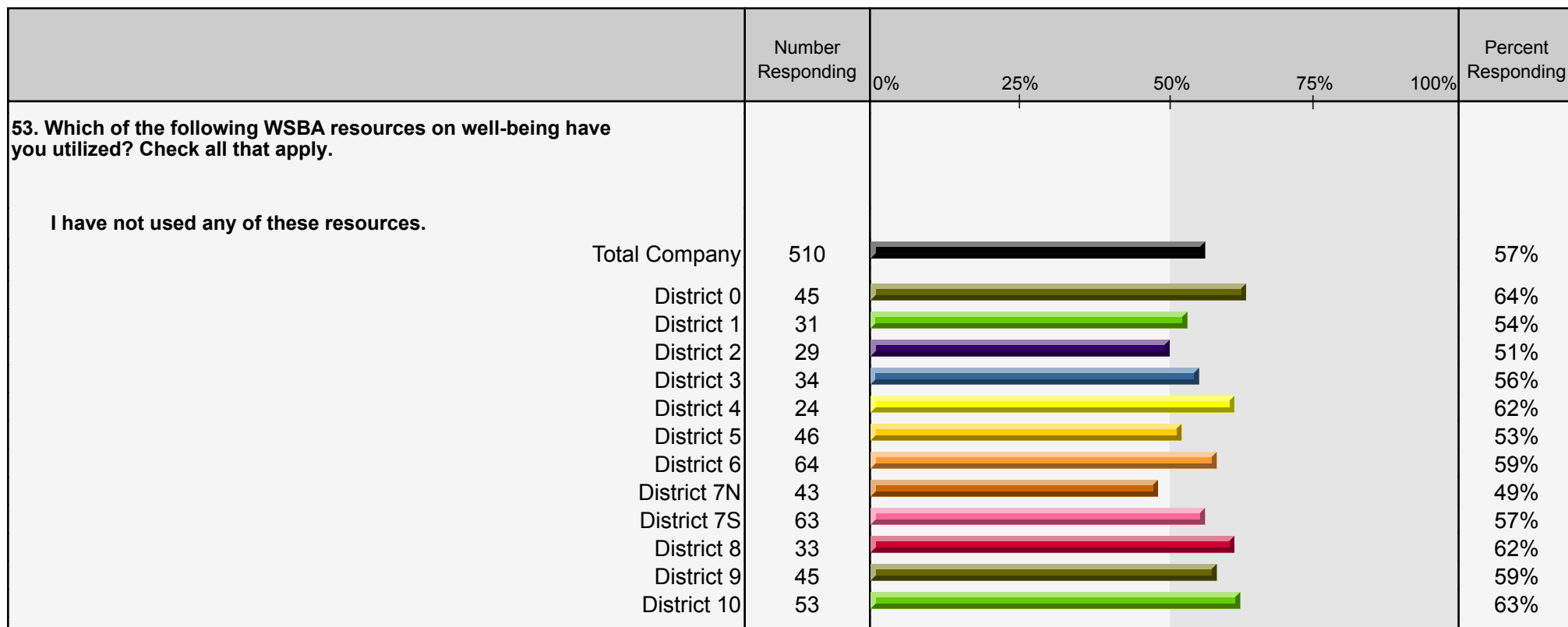
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



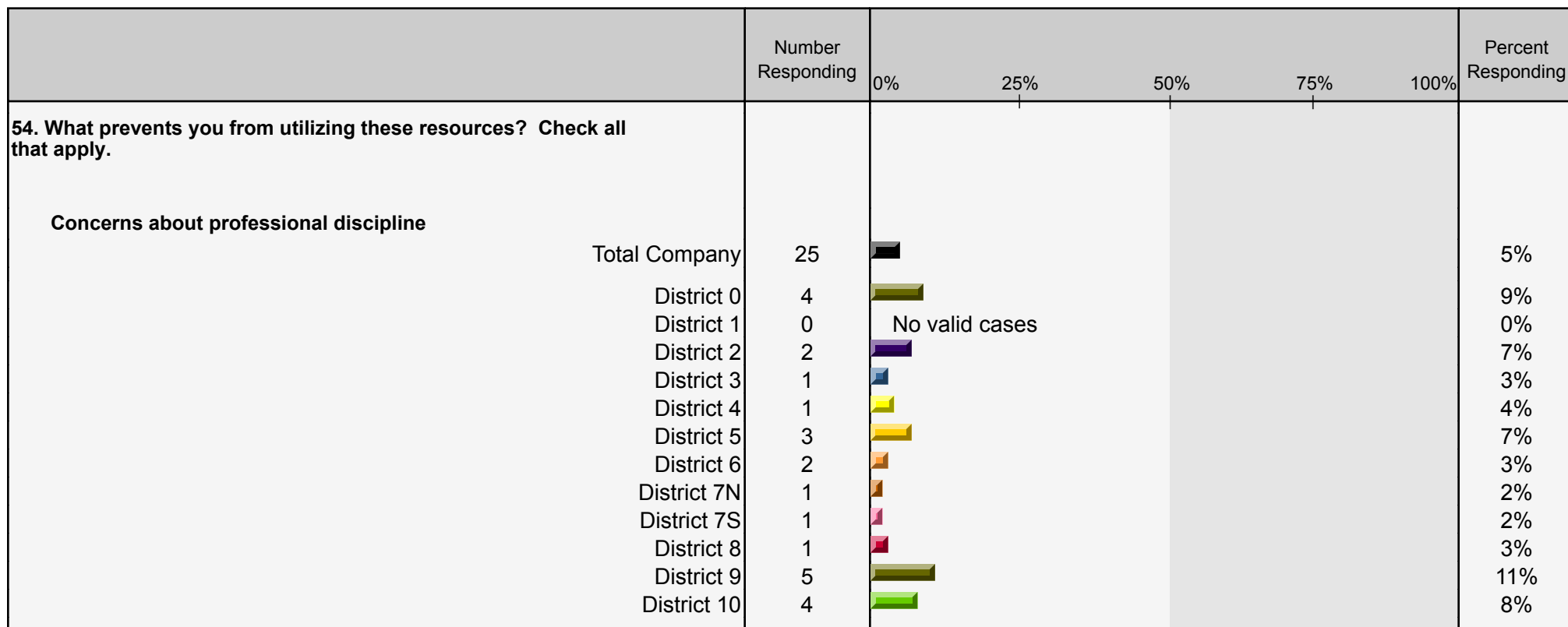
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



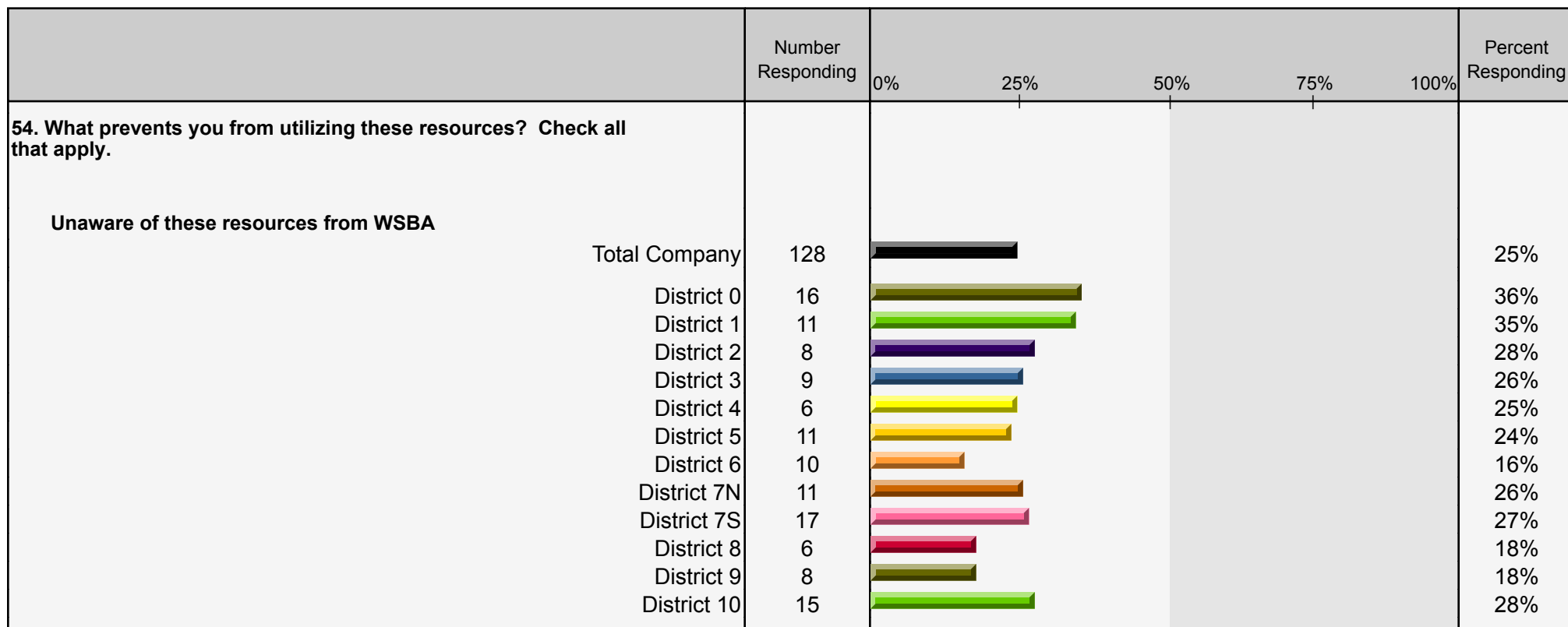
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



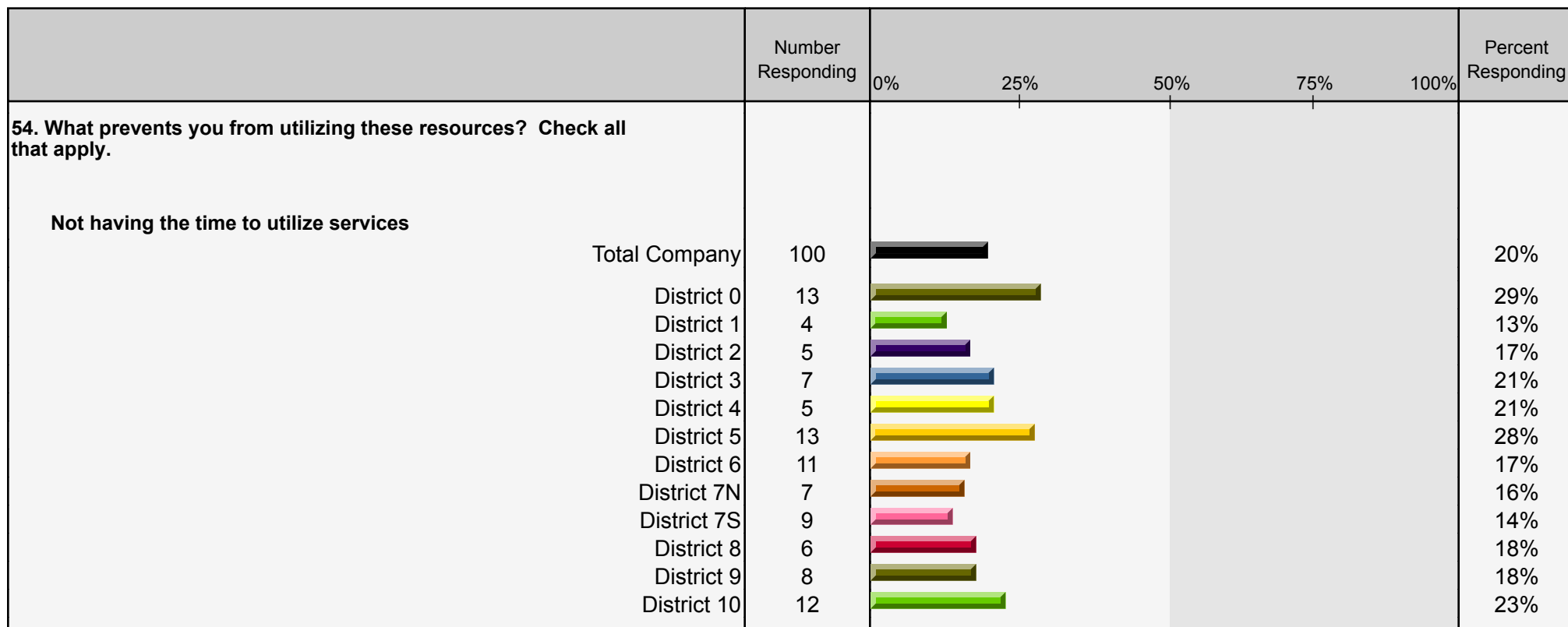
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



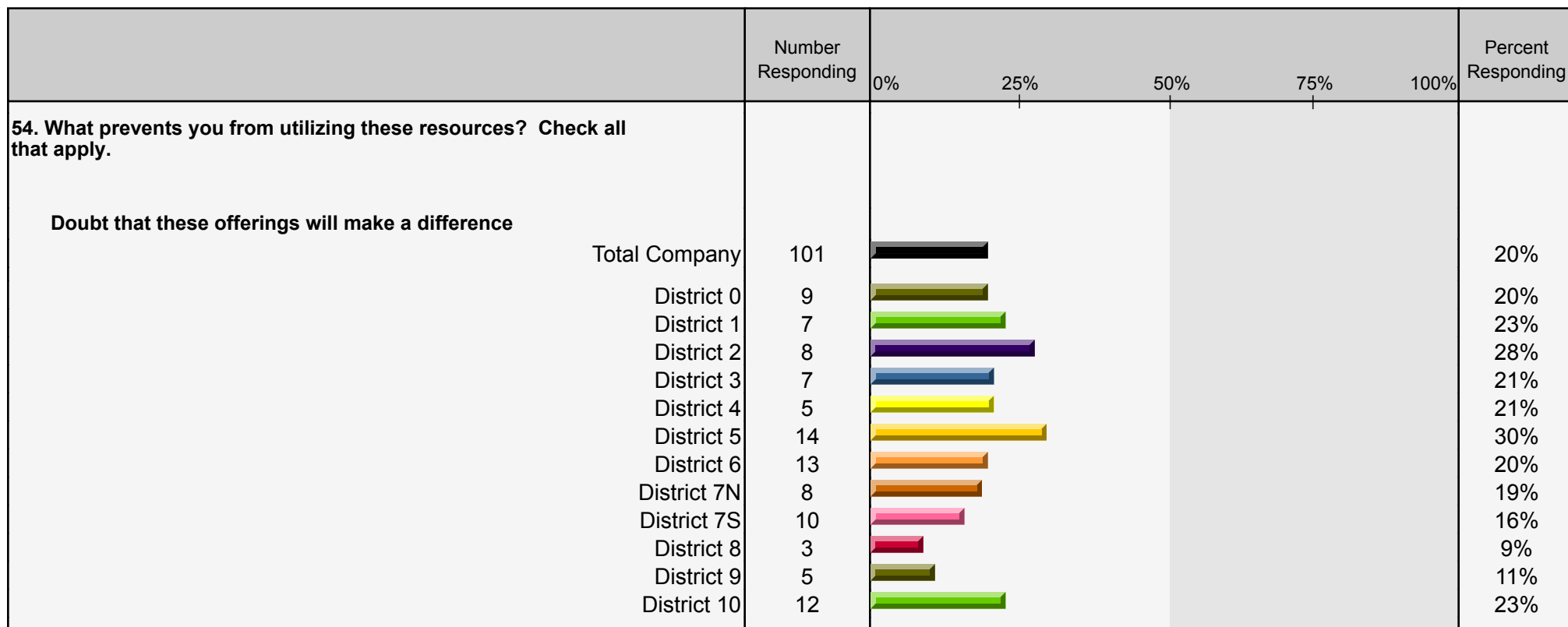
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



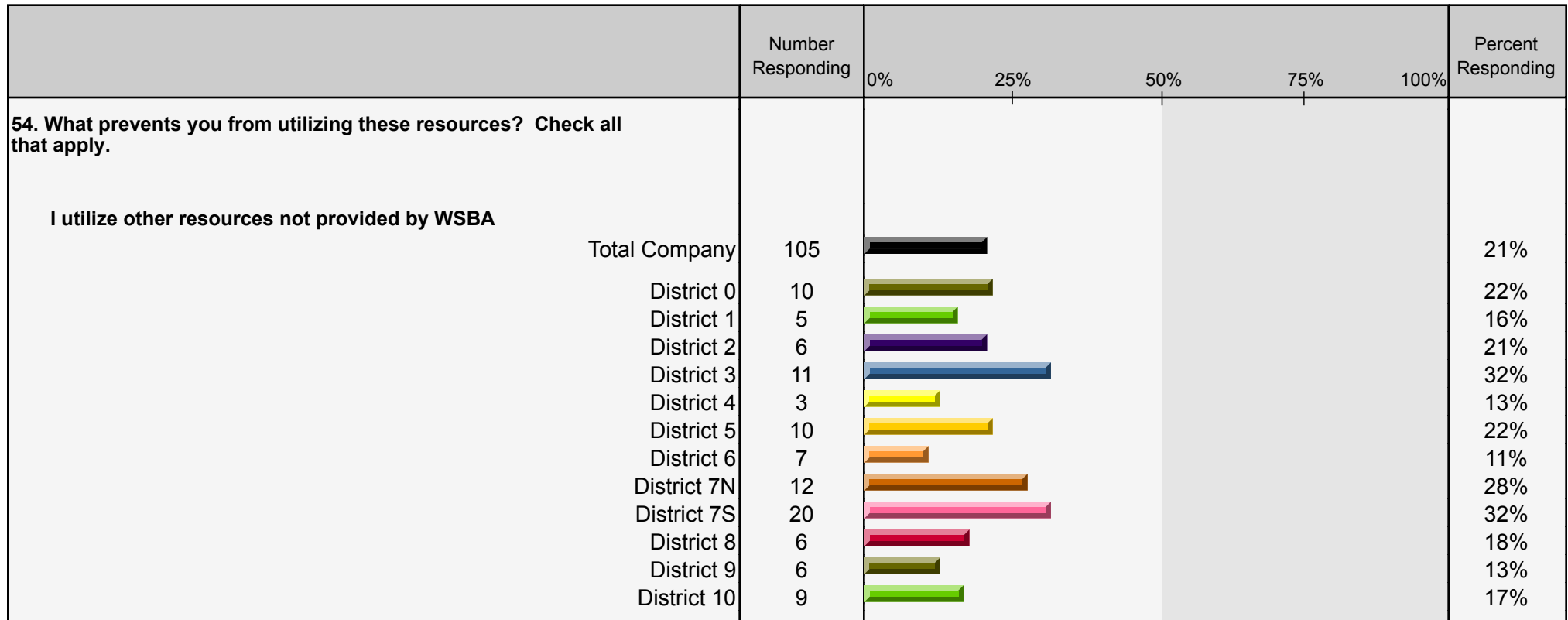
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



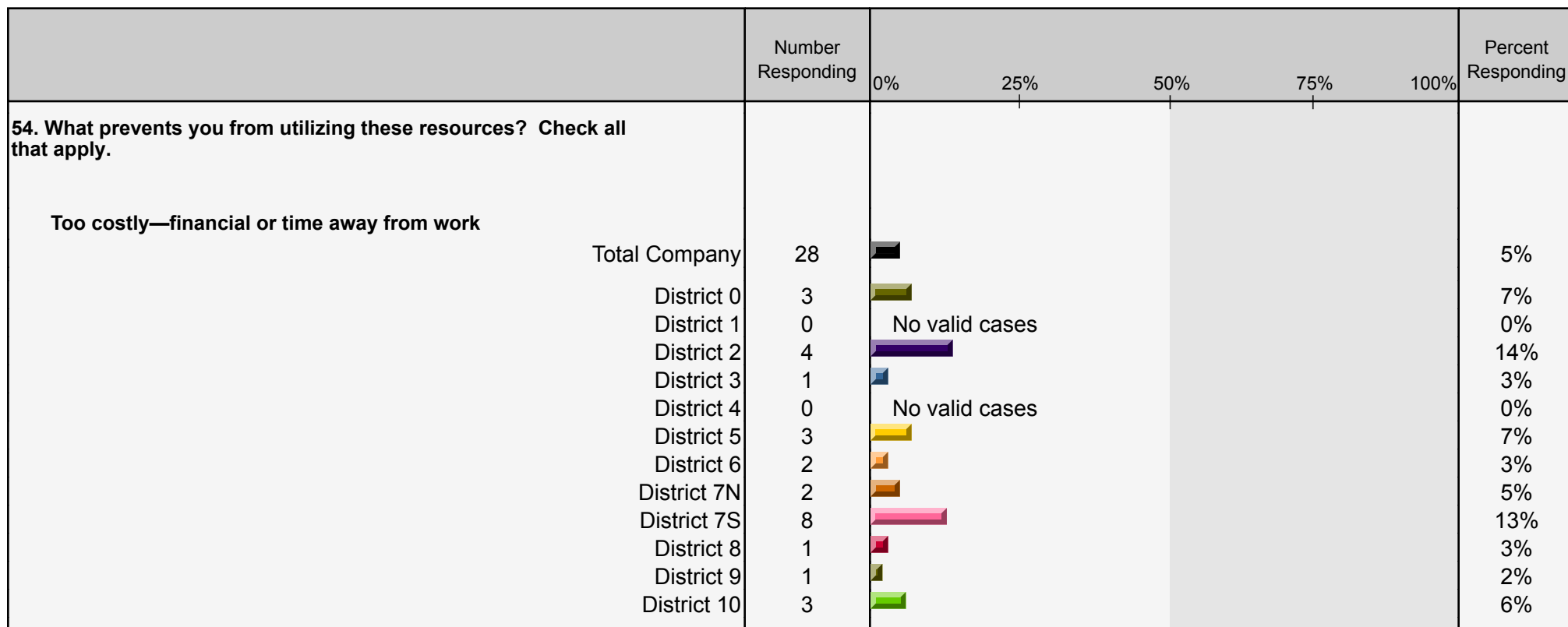
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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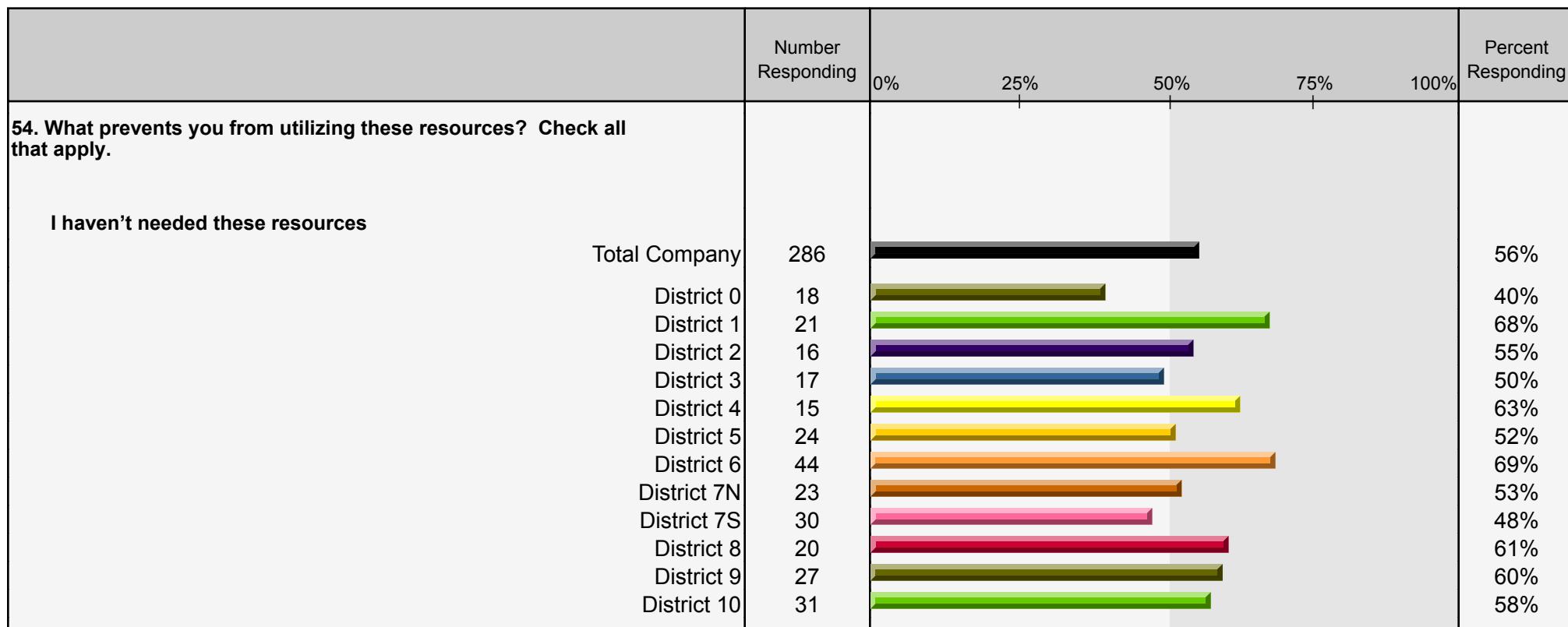
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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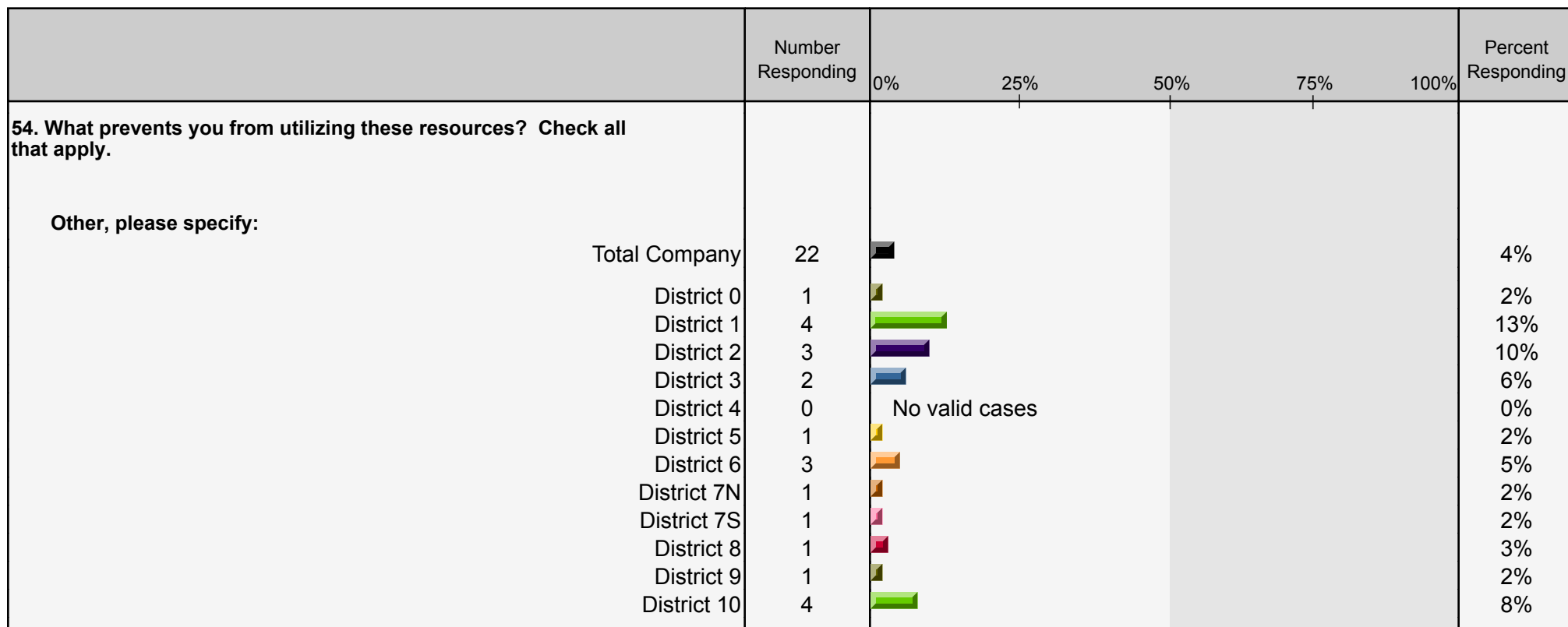
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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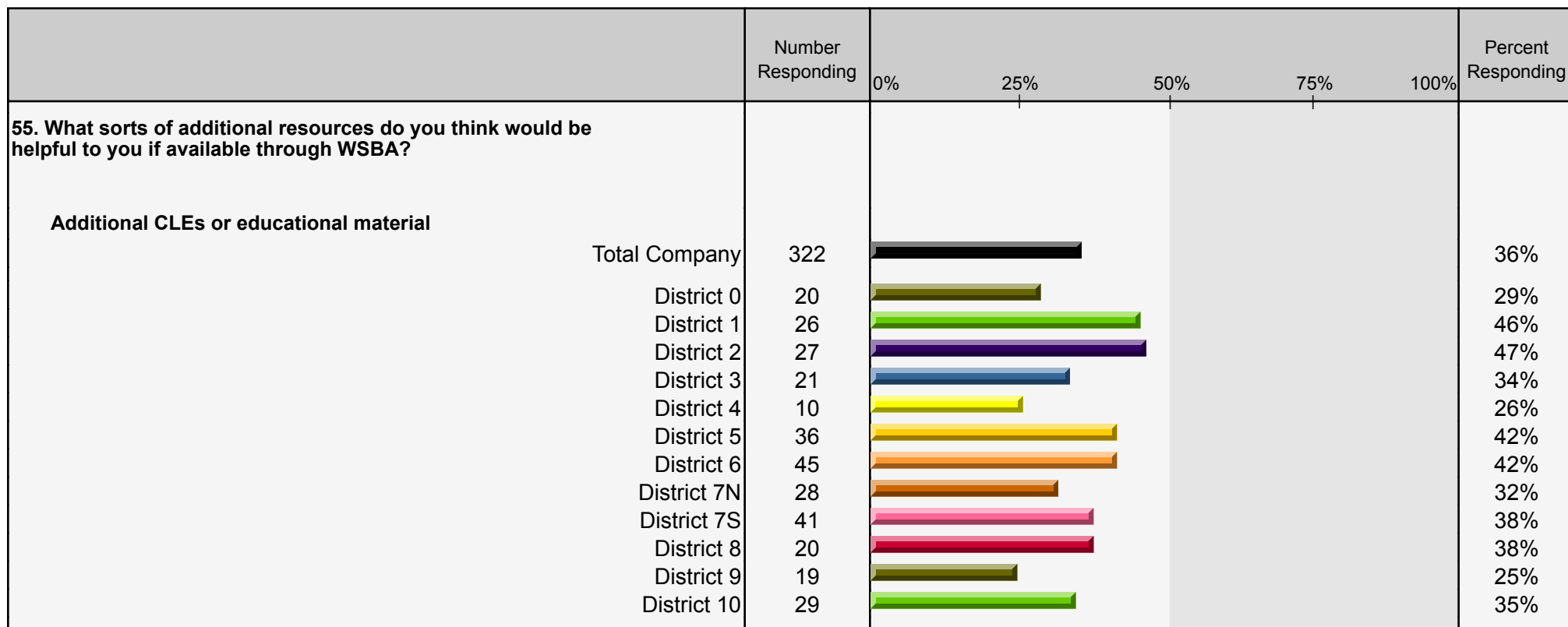
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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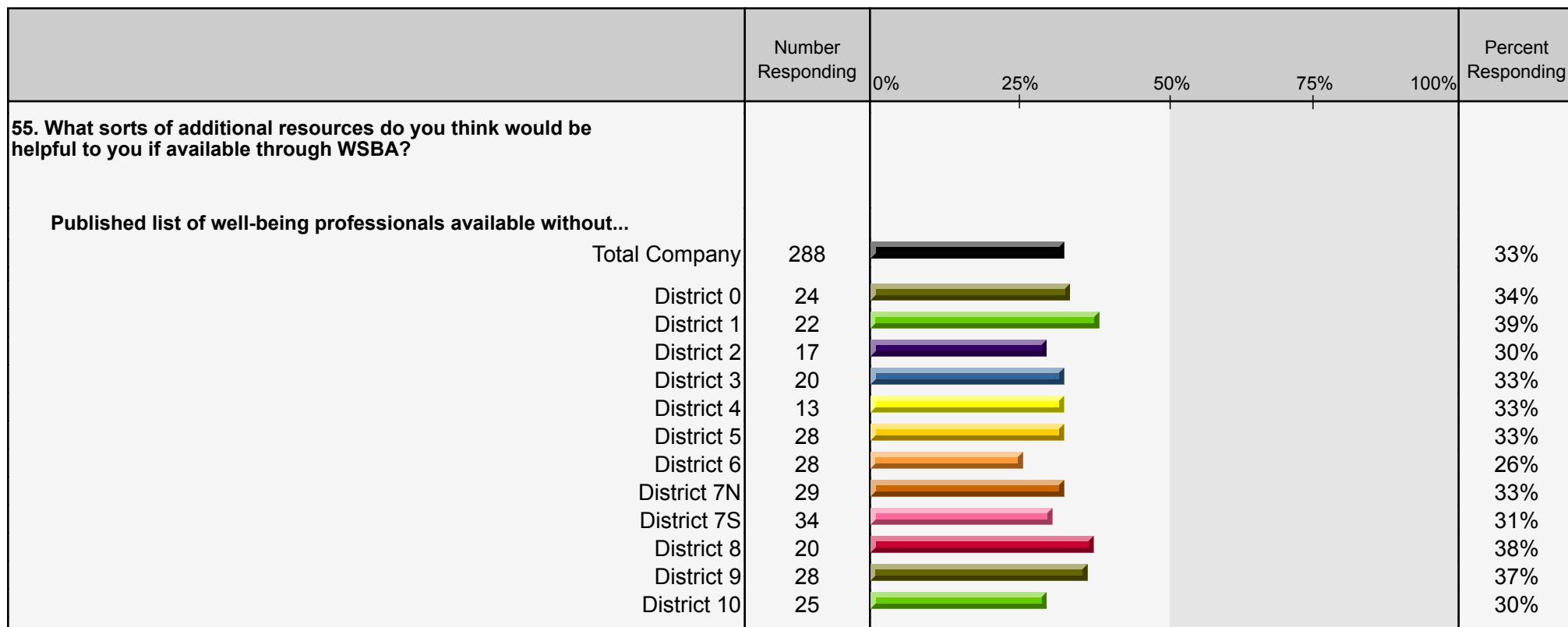
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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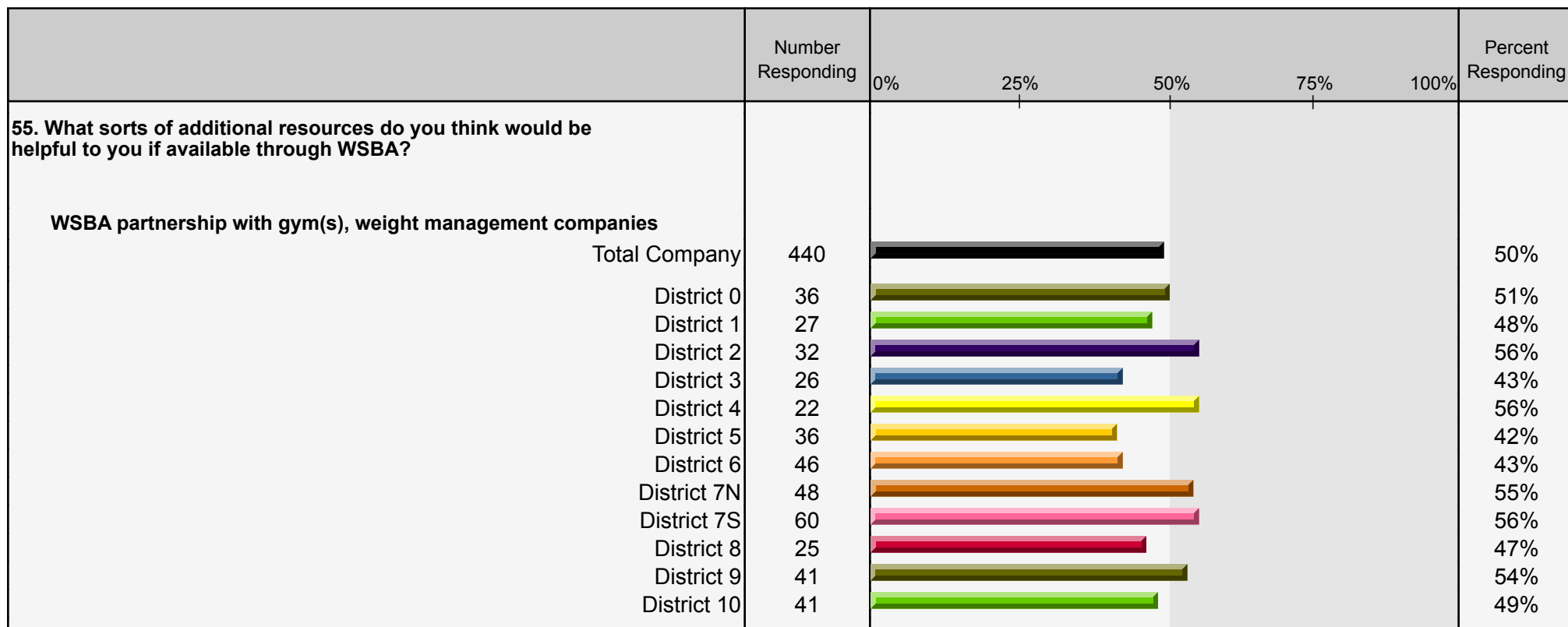
Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



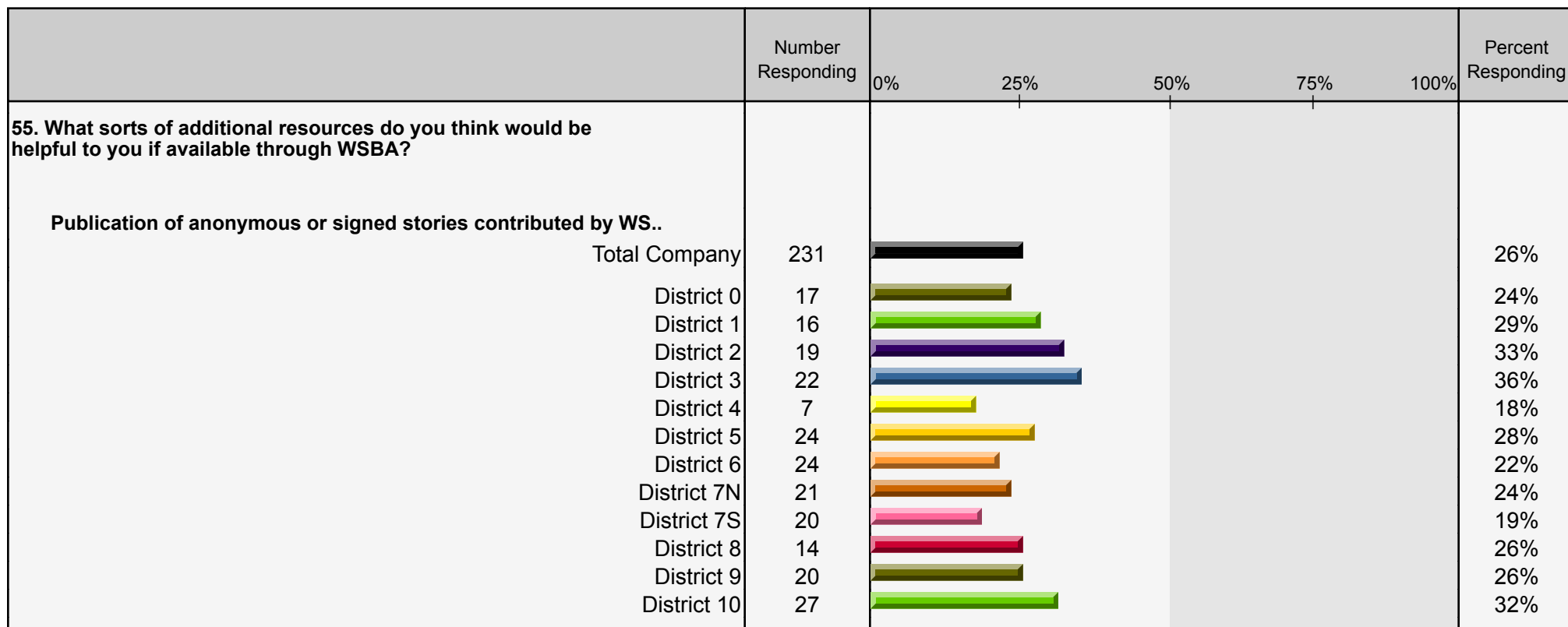
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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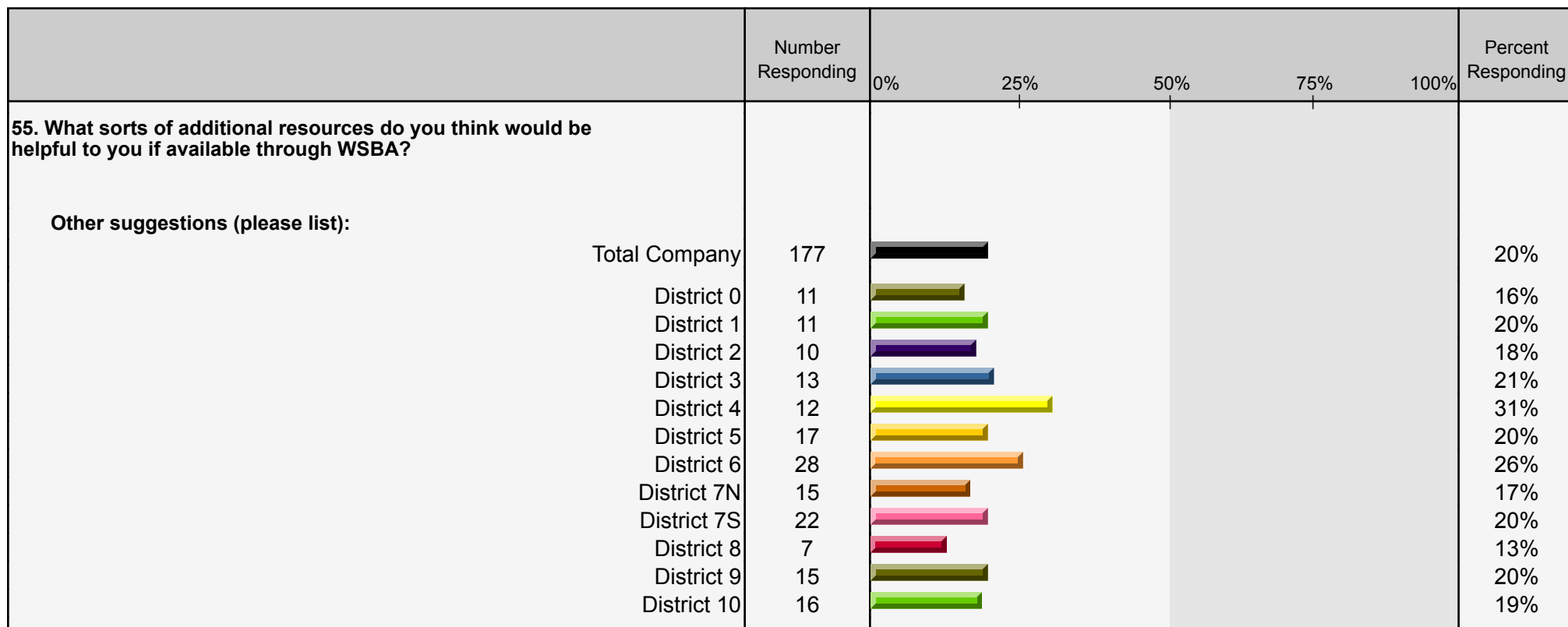
Washington State Bar Association - Member Wellbeing Survey - Congressional District

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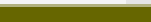











Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific



Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

Items	Number Responding	Mean	Performance Graph			Not at All	Somewhat	Significantly
			1	2	3			
56. Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being?								
Standardizing court rules/preferences across counties								
Total Company	671	2.22				19%	40%	41%
District 0	51	2.29				24%	24%	53%
District 1	39	2.23				23%	31%	46%
District 2	44	2.23				20%	36%	43%
District 3	49	2.10				24%	41%	35%
District 4	29	1.86				34%	45%	21%
District 5	66	2.11				24%	41%	35%
District 6	90	2.13				20%	47%	33%
District 7N	67	2.34				9%	48%	43%
District 7S	77	2.14				19%	47%	34%
District 8	35	2.54				6%	34%	60%
District 9	53	2.26				13%	47%	40%
District 10	71	2.37				18%	27%	55%














Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

Items	Number Responding	Mean	Performance Graph			Not at All	Somewhat	Significantly
			1	2	3			
56. Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being?								
Feedback resources when there are concerns about a judge's behavior (condescending								
Total Company	679	2.12				22%	45%	33%
District 0	54	1.96				31%	41%	28%
District 1	38	2.18				16%	50%	34%
District 2	43	2.16				19%	47%	35%
District 3	48	2.06				27%	40%	33%
District 4	35	2.03				26%	46%	29%
District 5	66	2.14				17%	53%	30%
District 6	89	1.99				28%	45%	27%
District 7N	71	2.30				13%	45%	42%
District 7S	75	2.07				28%	37%	35%
District 8	35	2.46				14%	26%	60%
District 9	55	2.13				20%	47%	33%
District 10	70	2.10				17%	56%	27%














Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

Items	Number Responding	Mean	Performance Graph			Not at All	Somewhat	Significantly
			1	2	3			
56. Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being?								
Consistent consequences for abusive/demeaning tactics within								
Total Company	648	2.03				29%	38%	32%
District 0	54	2.02				33%	31%	35%
District 1	36	1.92				39%	31%	31%
District 2	42	2.10				19%	52%	29%
District 3	44	2.18				23%	36%	41%
District 4	31	1.77				45%	32%	23%
District 5	59	2.03				29%	39%	32%
District 6	88	1.91				32%	45%	23%
District 7N	68	2.22				21%	37%	43%
District 7S	71	1.92				35%	38%	27%
District 8	35	2.26				23%	29%	49%
District 9	55	1.93				35%	38%	27%
District 10	65	2.09				25%	42%	34%

Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

Items	Number Responding	Mean	Performance Graph			Not at All	Somewhat	Significantly
			1	2	3			
56. Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being?								
Lawyer MCLE requirement for well-being education.								
Total Company	797	1.60				49%	41%	10%
District 0	64	1.56				48%	47%	5%
District 1	51	1.61				53%	33%	14%
District 2	51	1.59				47%	47%	6%
District 3	55	1.69				42%	47%	11%
District 4	36	1.44				58%	39%	3%
District 5	81	1.52				53%	42%	5%
District 6	99	1.61				52%	36%	12%
District 7N	77	1.71				43%	43%	14%
District 7S	96	1.58				52%	38%	10%
District 8	44	1.73				43%	41%	16%
District 9	66	1.59				47%	47%	6%
District 10	77	1.60				51%	39%	10%

Washington State Bar Association - Member Wellbeing Survey - Congressional District

Section III: Client Specific

Items	Number Responding	Mean	Performance Graph			Not at All	Somewhat	Significantly
			1	2	3			
56. Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being?								
Making court filing deadlines earlier than midnight								
Total Company	562	1.38				71%	21%	8%
District 0	45	1.53				60%	27%	13%
District 1	35	1.43				63%	31%	6%
District 2	36	1.42				69%	19%	11%
District 3	40	1.48				70%	13%	18%
District 4	23	1.22				78%	22%	0%
District 5	53	1.21				83%	13%	4%
District 6	74	1.24				81%	14%	5%
District 7N	63	1.46				65%	24%	11%
District 7S	64	1.38				69%	25%	6%
District 8	29	1.62				55%	28%	17%
District 9	41	1.29				76%	20%	5%
District 10	59	1.37				69%	24%	7%

Member Wellbeing Survey

Thank you for agreeing to participate in the Member Well-Being Survey. Your feedback will provide important information to inform tangible steps the WSBA can take to enhance well-being among WSBA Members and the broader legal community in Washington.

The WSBA has partnered with National Business Research Institute (NBRI) to collect and analyze information from Members. NBRI's interface will allow survey takers unique access to the survey while remaining anonymous in results reported back to the WSBA; we hope you will participate and offer your honest opinions. You may view NBRI's Privacy Policy [here](#).

Instructions:

1. Proceed to the questions by clicking on the Next Page button below.
 2. Please read each question completely and indicate your response using the scale shown.
 3. When complete, please click on the Submit Survey button to submit your answers.
-

Please Select

What is your gender identity?

Please Select

What is your race/ethnicity? Select all that apply:

- ☐ American Indian/Native American/Alaskan Native
- ☐ Asian-Central Asian
- ☐ Asian-East Asian
- ☐ Asian-South Asian
- ☐ Asian-Southeast Asian
- ☐ Asian-Unspecified
- ☐ Black/African American/African Descent
- ☐ Hispanic/Latinx
- ☐ Middle Eastern Descent
- ☐ Multi-Racial/Bi-Racial
- ☐ Pacific Islander/Native Hawaiian
- ☐ White/European Descent
- ☐ Other (please specify)
- ☐ Prefer not to disclose

What is your relationship status?

Please Select

Do you have caregiving responsibilities on a regular basis for one or more minor children, dependent adults, or aging parents?



What is your sexual orientation?

Please Select

In what county is your primary practice and/or workplace?

Please Select

How many years have you been licensed to practice law?

Please Select

Which of the following is your WSBA license type?

Please Select

Rounded to the nearest whole number, how many years have you sat on the bench?

Which setting best describes your current judicial position?

Please Select

Which of the following best describes your primary area of practice?

Please Select

Which of the following best describes the organization where you currently work?

Please Select

Do you have the option to work remotely?

Please Select

To what extent does your ability (or inability) to work remotely impact your overall wellbeing?

Please Select

In the past month, how many hours did you work in an average week? Include billable and non-billable time.

Please Select

How many billable hours do you work on average per week?

Please Select

No

Yes

Does your employer have a minimum billable hour expectation?



What is the billable hour expectation?

Please Select

How often do billable hour expectations cause you stress?

Please Select

How often do you feel burned out from your work?

Please Select

How often does your employer (or clients if in solo practice) expect you to be available outside of work hours?

Please Select

Have you ever considered leaving the legal profession due to stress, burnout, or mental health issues?

Please Select

How often do you feel stressed by your financial situation?

Please Select

Have financial concerns ever caused you to consider leaving the legal profession?

Please Select

Did you graduate law school with student loan debt?

Please Select

How much debt did you have upon graduation?

Please Select

To what extent has student loan debt negatively affected your mental wellbeing?

Please Select

Have you ever wanted to make a job or career change, but did not because of your student loan debt?

Please Select

During the past 7 days, how many days did you engage in physical activity for at least 20 minutes?

Please Select

How many hours of sleep do you get on an average night?

Please Select

How often do you wake up feeling rested and restored?

Please Select

Which of the following activities do you do to support your mental health and wellbeing? Check all that apply.

- ☐ Meditation
 - ☐ Therapy, counseling, or group supports
 - ☐ Physical exercise or active hobby (gardening, dancing, etc.)
 - ☐ Prescription medication
 - ☐ Supplements, vitamins, or over-the-counter medications
 - ☐ Other:
 - ☐ I am not doing any activities to support my mental health.
-

In the past month, how often have you felt sad, depressed, or hopeless?

Please Select

In the past month, how often have you felt nervous, on edge, worried or panic?

Please Select

The following questions address sensitive topics related to mental health, specifically experiences with suicidal thoughts or acts of self-harm, and may be distressing for some individuals. If you find this content difficult, please feel free to skip this question, take a moment for self-care, and/or reach out to a support resource if needed.

24/7 National Suicide Prevention Hotline: dial 988
24/7 Crisis Text Line: Text “HOME” to 741741

	No	Yes
Do you want to skip these questions?	<input type="radio"/>	<input type="radio"/>
In the past 12 months, have you had suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm?	<div>Please Select</div>	
To what extent do you feel your work environment contributed to these thoughts or actions?	<div>Please Select</div>	
Do you ever feel concerned about how much or how often you drink alcohol?	<div>Please Select</div>	
In the past 12 months, has anyone expressed concern about your use of alcohol?	<div>Please Select</div>	

Please Select

Do you ever feel concerned about how much or how often you use drugs recreationally?

Please Select

In In the past 12 months, has anyone expressed concern about your use of recreational drugs?

Please Select

To what extent do you agree with the following statement: The stress of my job and/or the culture at my workplace cause me to drink alcohol or use recreational drugs more than I otherwise would.

Please Select

My workplace social events include alcohol:

Please Select

Are you exposed to distressing material, experiences, or trauma related to your clients or others you encounter in doing your job?

Please Select

How often do you find yourself thinking about work-related distressing material, experiences, or trauma outside of work?

Please Select

How much of an impact does exposure to distressing material, experiences, or trauma from work have on your mental health or wellbeing?

Please Select

Does your employer offer wellness programs, initiatives, or other wellbeing resources?

Please Select

What resources does your employer offer? Check all that apply.

- ☐ Educational content on well-being
 - ☐ Membership or subscriptions to wellness resources or apps
 - ☐ Direct financial support for well-being activities (gym stipends, etc.)
 - ☐ Flexible options for mental health leave
 - ☐ Access to or referrals for external wellness resources (coaches, therapists, etc.)
 - ☐ Whole office mental health opportunities (scheduled walk/stretch breaks, periodic ½ days not on holidays, wellness speakers at staff meetings, etc.)
 - ☐ Other, please specify:
-

	No	Yes
Have you utilized any wellness programs offered by your employer?	<input type="radio"/>	<input type="radio"/>

What prevents you from utilizing these resources? Check all that apply.

- ☐ Stigma, or reputational/confidentiality concerns
- ☐ Fear it will affect your path to promotion
- ☐ Not having the time to utilize services
- ☐ Doubt that these offerings will make a difference
- ☐ I utilize other resources not provided by my employer
- ☐ Too costly—financial or time away from work
- ☐ I haven’t needed these resources

☐ Other, please specify:

Which of the following WSBA resources on well-being have you utilized? Check all that apply.

- ☐ CLEs on well-being related topics
 - ☐ Online support groups (Healing Minds, Pathways to Productivity, Career Guidance)
 - ☐ Referrals for services (for therapists, prescribers, treatment centers, Unbar)
 - ☐ Peer advising
 - ☐ Mental health consultations/brief therapy
 - ☐ I have not used any of these resources.
-

What prevents you from utilizing these resources? Check all that apply.

- ☐ Concerns about professional discipline
 - ☐ Unaware of these resources from WSBA
 - ☐ Not having the time to utilize services
 - ☐ Doubt that these offerings will make a difference
 - ☐ I utilize other resources not provided by WSBA
 - ☐ Too costly—financial or time away from work
 - ☐ I haven't needed these resources
 - ☐ Other, please specify:
-

What sorts of additional resources do you think would be helpful to you if available through WSBA?

- ☐ Additional CLEs or educational material
- ☐ Published list of well-being professionals available without request or log-in
- ☐ WSBA partnership with gym(s), weight management companies, etc. for

discounted memberships

☐ Publication of anonymous or signed stories contributed by WSBA members willing to share their struggles/successes regarding well-being challenges

☐ Other suggestions (please list):

Please consider the following possible rule, court, or institutional changes.
To what extent would they improve your well-being?

Not at
All

Somewhat

Significantly

Making court filing deadlines earlier than midnight

☐☐☐

Standardizing court rules/preferences across counties

☐☐☐

Consistent consequences for abusive/demeaning tactics within
hearings(direct comments to opposing counsel, use of improper names
such as “sweetheart”)

☐☐☐

Feedback resources when there are concerns about a judge’s behavior
(condescending attitude, being overly harsh, etc.)

☐☐☐

Lawyer MCLE requirement for well-being education.

☐☐☐

What other possible rule, court, or institutional
changes would improve your well-being?

What could your employer, the legal
community, courts, or legal institutions do to
better support your mental health and
wellbeing?

TO: WSBA Board of Governors
CC: Terra Nevitt, Executive Director
FROM: Renata Garcia, Chief Regulatory Counsel
DATE: April 8, 2025
RE: Proposed Amendments to WSBA Bylaws Art. IX Sec. B.1.a

FIRST READ: Proposed amendments to the WSBA Bylaws relating to license status for eligibility for service on a WSBA committee are presented for discussion and first read.

Background

In 2024, a member status workgroup recommended amendments to the WSBA Bylaws permitting inactive, honorary, or pro bono members to serve on WSBA committees. At the Board of Governors meeting in October 2024, the Board of Governors approved the amendments and the Court thereafter approved the amendments effective December 31, 2024. See WSBA Bylaws Art. III Sec. B.2 and 4, which relate to the benefits of different license statuses.

Overlooked in that project was Art. IX Sec. B.1.a regarding eligibility for membership on a WSBA committee. Except for the language relating to chairs and vice chairs of committees, the proposed amendments here align the committee section of the WSBA Bylaws with the intent of the member status workgroup and the sections of the Bylaws already amended. With regard to chairs and vice chairs, there does not appear to be a reason to exclude inactive, honorary, or pro bono members from serving as chair or vice chair. Each committee nomination team will be in the best position to choose the appropriate people to lead its committee.

Attachments

1. Proposed Amendments to WSBA Bylaws Art. IX Sec. B.1.a – Markup Version

IX. COMMITTEES, COUNCILS, AND OTHER BAR ENTITIES

B. COMMITTEES AND OTHER BAR ENTITIES

1. Committees

Committees are created and authorized by the BOG to study matters relating to the general purposes and business of the Bar which are of a continuous and recurring character. The number, size, and functions of each committee will be determined from time to time by the BOG.

- a. All active members of the Bar may serve as committee members, Chairs, and Vice Chairs. Inactive, Honorary, and Pro Bono members of the Bar may be appointed to serve as Chairs, Vice Chairs, or voting or nonvoting members on any committee as deemed appropriate. Exception: faculty of Washington state law schools who are not members of the Bar are permitted to serve on the Committee on Professional Ethics (CPE).

IX. COMMITTEES, COUNCILS, AND OTHER BAR ENTITIES

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TO: WSBA Board of Governors (BOG)
CC: Terra Nevitt, Executive Director
FROM: Renata de Carvalho Garcia, Chief Regulatory Counsel
DATE: April 8, 2025
RE: Applicant APR 2(b) Request for Reconsideration of Application for Admission by Motion

EXECUTIVE SESSION – ACTION REQUESTED:

An admission applicant is requesting BOG review under Rule 2(b) of the Washington Supreme Court Admission and Practice Rules (APR) of WSBA staff's determination that applicant does not meet the criteria established in APR 3(c) and, therefore, does not qualify for lawyer admission by motion.

Application records are confidential pursuant to APR 1(b). Therefore, pursuant to WSBA Bylaws Art. VII Sec. B.7.a.2 BOG review of application matters under APR 2(b) occurs in executive session and customarily on the written record only. See WSBA Bylaws Art. VII Sec. B.7.a (other persons excluded from executive session unless approved by a majority of the BOG).

WSBA RISK ANALYSIS: N/A

WSBA FISCAL ANALYSIS: N/A

WSBA EQUITY ANALYSIS: N/A

Confidential Attachments

1. Regulatory Services Department Memorandum to the BOG
2. Applicant Letter of Request for Reconsideration of Application for Admission by Motion
3. Applicant application materials

TO: WSBA Board of Governors
CC: Terra Nevitt, Executive Director
FROM: Jeanne Marie Clavere, Senior Professional Responsibility Counsel
Monte Jewell, Chair, Committee on Professional Ethics
DATE: March 27, 2025
RE: Committee on Professional Ethics New Advisory Opinion – For Information Only

Committee on Professional Ethics New Advisory Opinion 202501 – For Information Only

INFORMATION ONLY: New Advisory Opinion 202501 addresses issues surrounding lawyers representing a licensed residential care or nursing home facility in seeking a guardianship or conservator for a resident and the confidentiality of sharing information with a not yet appointed Certified Professional Guardian (CPG) or Conservator as well as the subsequent simultaneous representation of both a Long Term Care Facility and the representation of the court-appointed Certified Professional Guardian (CPG) or Conservator. The RPC that are contained in this opinion are 1.0A, 1.1, 1.6, 1.7, 1.10.

Background

On June 30, 2023, the Committee on Professional Ethics (CPE) received the following inquiry:

May a lawyer who represents a residential care or nursing home facility in seeking a guardianship for a resident, communicate with a proposed CPG during the guardianship proceeding as to the respondent's medical, financial, written and oral statements, and thereafter may the lawyer represent the court- appointed CPG?

The inquiry was assigned to this subcommittee at the August 2023 CPE meeting. At that time, the subcommittee members were Mark Fucile, Pam Anderson, and Janice Wang. Due to the normal rotation of individuals on and off the CPE as their terms expired, the subcommittee members are now Mark Fucile, Zachary Dillon, and Peter Jarvis.

Prior to the October 2023 meeting, the subcommittee reached out to Judge Robert A. Lewis, the chair of the Certified Professional Guardianship and Conservatorship Board, Ronald St. Hilaire, the then current chair of the WSBA Elder Law section, and Kameron Kirkevold, the chair of the KCBA Guardianship & Elder Law section. No comments were received at that time.

Community Input

After the CPE reviewed a draft advisory opinion at the February 2024 meeting, the subcommittee circulated that draft to the following stakeholders for comments: Certified Professional Guardianship &

Conservatorship Board, Columbia Legal Services, Disability Rights Washington, KCBA Guardianship & Elder Law Section, National Academy of Elder Law, WSBA Elder Law Section, and Washington State Long-Term Care Ombudsman Program.

On July 10, 2024, the subcommittee received extensive comments from attorney Amy Freeman on behalf of the State Long-Term Care Ombudsman Program for Washington. Judge Robert Lewis also responded to the outreach, but did not have any comments. Based on the Ombuds comments, and subsequent research and analysis by subcommittee members, and on input from other members of the CPE, the subcommittee thereafter submitted (and the CPE approved at their February 14, 2025, meeting) the attached substantially revised proposed Advisory Opinion.

Advisory Opinion Questions, Analysis and Conclusions

This AO addresses two questions:

1. May a lawyer who represents a licensed long-term care facility regarding a petition for appointment of a Certified Professional Guardian (“CPG”) or conservator for a resident of the facility disclose information about the resident to the potential CPG or conservator prior to their appointment?
2. After a CPG or conservator is appointed, may the lawyer simultaneously represent both the facility and the CPG or conservator?

The AO concludes that the answer to the first question depends primarily on what federal and state law governing the confidentiality of information about residents of long-term care facilities permits or prohibits. If, in other words, the sharing of this information is lawful under applicable federal and state law, then the information may be shared if it is in the interests of the lawyer’s client to do so. If not, then not. Since questions of federal and state confidentiality law on these issues fall outside of the scope of the RPC issues that the CPE exists to consider, the AO notes that we express no opinion on those federal and state confidentiality questions.

The AO then discusses the conflict-of-interest issues under RPC 1.7 that are at the heart of the second question. As noted in the AO, there are many instances in which the interests of a long-term care facility and a resident for whom a CPG or (to a lesser extent) a conservator may conflict within the meaning of RPC 1.7(a), and there are many such instances in which the resulting conflict may not be subject to waiver or consent within the meaning of RPC 1.7(b). On the other hand, the CPE did not believe that we could state that there will always be conflicts or that all such conflicts will not be subject to waiver or consent. For this reason, the AO necessarily stops short of a blanket prohibition on all such representations. The AO also notes that the conflicts risks that may or are likely to arise from simultaneous representation of a facility and a CPG are greater than those likely to arise from simultaneous representation of a facility and a conservator since the duties of a CPG are far broader in scope than those of a conservator.

Attachments

WSBA Ethics Advisory Opinion 202402

WASHINGTON STATE BAR ASSOCIATION

Advisory Opinion: 2025-XX

Year Issued: XX/XX/2025

RPCs: 1.0A, 1.1, 1.2, 1.6, 1.7, 1.10

Subject: Representing a Licensed Long-Term Care Facility and Sharing Information about a Resident with a Potential but not yet Appointed Certified Professional Guardian or Conservator; Subsequent Simultaneous Representation of Both a Long-Term Care Facility and a Certified Potential Guardian or Conservator

ISSUES

1. May a lawyer who represents a licensed long-term care facility [n.1] regarding a petition for appointment of a Certified Professional Guardian (“CPG”) [n.2] or conservator [n.3] for a resident of the facility disclose information about the resident to the potential CPG or conservator prior to their appointment?
2. After a CPG or conservator is appointed, may the lawyer simultaneously represent both the facility and the CPG or conservator?

SHORT ANSWERS

1. A lawyer representing the facility may disclose information about a resident with a prospective CPG or conservator only if the disclosure is: (a) permitted by applicable substantive law; and (b) consistent with the lawyer’s duty of competent representation of the facility under RPC 1.1, including but not limited to the duty to protect confidential information about the resident.
2. After a CPG or conservator is appointed, the lawyer may only represent both the facility and the CPG or conservator only if: (a) no conflict of interest would result under RPC 1.7; or (b) the resulting conflict is one that is capable of written informed consent and such consent is obtained.
Representing both a long-term care facility and a CPG or conservator for a

resident of the facility will often lead to conflicts of interest, and many of those conflicts will not be subject to waiver or consent. This is especially so when the lawyer is considering representation of a CPG in addition to the facility. Even though the lawyer's second client will be the CPG and not the resident or ward, the extremely wide scope of the duties owed by CPGs to residents/wards and to the many ways in which the interests of a facility and its residents can be adverse, the simultaneous representation of both a facility and a CPG for a resident of the facility is likely to result in conflicting obligations that cannot be waived.

The conflicts risks are lower when the lawyer's second client is a conservator rather than a CPG because the duties of conservators to residents are far more limited than those owed by CPGs. Nonetheless, a case-by-case analysis of the prospects for conflicts and for conflicts waivers will still be required.

ANALYSIS

Question 1.

As with any other matter, a lawyer representing a facility regarding the potential appointment of a CPG or conservator owes the facility a duty of competent representation under RPC 1.1 [n.4] In the present context, this includes but is not limited to advising the facility against disclosures of information about a resident that would violate substantive federal or state law regarding the resident's right to confidentiality. The lawyer's duty of competent representation to the facility also includes advising the facility to take reasonable steps to assure that any potential CPG or conservator with whom information may be shared can reasonably be relied upon to protect resident confidentiality.

Since these substantive federal and state law requirements are outside the range of issues that may be addressed in Advisory Opinions, we cannot address them.[n.5] We do note, however, that any substantive federal or state obligations regarding resident confidentiality are in addition to the lawyer's duty to protect information relating to the representation of the facility under RPC 1.6.

Question 2.

A. Representing Facilities and CPGs

Washington law imposes very strong and very broad fiduciary and other legal obligations on CPGs. As noted in *Raven v. Department of Social and Health Services*, 177 Wash.2d 804, 823 (2013), "A guardianship is a trust relation of the most sacred

character.” (internal citation and quotation omitted). See also *In re Disciplinary Proceedings Against Petersen*, 189 Wash.2d 768, 778 (2014) states that “the paramount duty of a guardian [is] to actively seek information and input from the ward and others close to the ward to ensure appropriate care and residential placement decisions.” And as noted in *Guardianship of Lamb*, 173 Wash.2d. 173, 185 (2011) the CPG Standards under which CPGs must operate:

[D]irect guardians to provide timely and accurate reports to the court, act within the scope of the appointed guardianship, consult with the incapacitated person and defer to that person’s autonomous decision-making capacity when possible, cooperate with professional caregivers and relatives of the incapacitated person, and seek independent professional evaluations and opinions when necessary to identify the incapacitated person’s best interests.

The high and extensive set of obligations that Washington law imposes on CPGs necessarily affects the lawyer’s duty of competent representation in representing a CPG. A lawyer representing a CPG must take reasonable care under RPC 1.1 to keep the CPG in compliance with the CPG’s substantive obligations—including but not limited to the obligation to weigh heavily the actual or potential preferences or interests of the resident. It also follows that when representing a CPG in addition to a facility, a lawyer must consider any limitations on the lawyer’s conduct that may be imposed by RPC 1.7, the general concurrent client conflict of interest rule. Moreover, cases including *In re Guardianship of Karan*, 110 Wash.App. 76 (2002) hold that a lawyer who represents a CPG will at times owe direct duties to the resident as a third-party beneficiary even though the resident is not a client of the lawyer. A lawyer who represents a CPG may at times have direct civil liability to a resident even though the resident is not the lawyer’s client—an additional potential source of conflicts under RPC 1.7. [n.6]

RPC 1.7(a) provides that:

Except as provided in paragraph (b), a lawyer shall not represent a client if the representation involves a concurrent conflict of interest. A concurrent conflict of interest exists if:

- (1) the representation of one client will be directly adverse to another client; or
- (2) there is a significant risk that the representation of one or more clients will be materially limited by the lawyer’s responsibilities to another client, a former client or a third person or by a personal interest of the lawyer.

There are many instances in which the interests of residents—which, as noted, the CPG and the CPG’s lawyer must strive to protect—will be inconsistent with the interests of the facility. This will be true, for example, when issues arise with respect to resident care or to policies or practices of the facility that may adversely affect the resident in some way. If a lawyer (or law firm [n.7]) represents both a CPG and a facility when one or more such

issues between them are present, a conflict of interest will be present even if the lawyer only seeks to represent one “side” of that issue. Furthermore, present disagreements or disputes between a facility and a CPG are not the only source of conflicts that the lawyer must consider. Under RPC 1.7, the lawyer is charged not only with what the lawyer actually knows about the interests of the facility and the CPG but also with whatever else the lawyer should reasonably know with respect to those interests. This includes the extent to which future conflicts are reasonably foreseeable and the likely effect of harm to clients if such conflicts arise. In other words, the lawyer will have to consider and address with each client “the likelihood that a difference in interest [between the clients] will eventuate and, if it does, whether it will materially interfere with the lawyer’s independent professional judgment in considering alternatives or foreclose courses of action that reasonably should be pursued on behalf of the other client.” RPC 1.7, Comment [8]. This would include consideration of added costs to a client in the event of a subsequent need to change counsel due to a conflict.

Whenever the lawyer’s duties to the facility-client touch upon or concern resident rights or interests or the lawyer’s duties to the CPG-client touch upon or concern resident rights or interests which could adversely affect the facility, it is difficult if not impossible to imagine that no conflict of interest under RPC 1.7(a) will exist. If, by contrast, the lawyer’s representation of the facility has nothing to do with resident care issues but is limited to protecting the facility’s trademarks, and if it happened that no disputes foreseeably and reasonably appeared on the horizon regarding the care of the resident by the facility, then no conflict of interest at all might be present. When, however, there is factual or legal overlap between the work that the lawyer performs or is expected to perform for the facility and the CPG, a conflict under RPC 1.7(a) will be present.

When a conflict under RPC 1.7(a) is present, the lawyer may begin or continue representation of the facility and the CPG only if permitted by RPC 1.7(b), which requires that four conditions be met:

- 1) the lawyer reasonably believes that the lawyer will be able to provide competent and diligent representation to each affected client,
- 2) the representation is not prohibited by law,
- 3) the representation does not involve the assertion of a claim by one client against the other in the same litigation or other proceeding before a tribunal, and
- 4) each affected client gives informed consent in writing (following authorization from the other client to make any required disclosures).

We are not aware of any applicable statutes, regulations or case law holding that the kinds of simultaneous representation under consideration here are unambiguously “prohibited by law” within the meaning of RPC 1.7(b)(2). Nonetheless, we note that the “reasonable belief” standard contained in RPC 1.7(b)(1) is an objective, rather than a purely subjective, standard. In other words, the lawyer must not only personally believe that the lawyer

will be able to provide competent and diligent representation to each client, but that belief must be objectively reasonable from a neutral lawyer's or observer's point of view. In addition, and under RPC 1.7(b)(3), the lawyer could not represent both the facility and the CPG in litigation or other proceedings before a tribunal in which the facility and the CPG would be on the opposite side of any issues. And under RPC 1.7(b)(4) and RPC 1.0A(e), "Informed consent requires that each affected client be aware of the relevant circumstances and of the material and reasonably foreseeable ways that the conflict could have adverse effects on the interests of that client."

We agree that a CPG, as a lawfully appointed guardian, would have the right to waive or consent to a conflict that can be waived or consented to. Nonetheless, we find it difficult to conceive of situations in which informed consent from the CPG (and the facility) would be sufficient to allow a lawyer simultaneously to represent both a facility and a CPG for a resident of the facility with respect to any issues pertaining to the resident's rights or interests at, or with respect to, the facility.

B. Representing Facilities and Conservators

RPC 1.7 is also potentially applicable to the concurrent representation of a facility and a conservator. Nonetheless, the duties of a conservator are limited to protection of the resident's financial affairs and thus are much narrower in scope than the duties of a CPG with respect to the resident's overall welfare. It follows that the risk that a conflict will exist under Rule 1.7 and the risk that any resulting conflict will not be subject to waiver will be less in the facility-conservatorship context than in the facility-CPG context. If, however, a financial dispute was to arise between the facility and the conservator, it would certainly not be possible for the lawyer to represent both sides of the dispute and it is questionable whether there are many circumstances in which written consent from both clients would allow the lawyer to proceed on behalf of either one against the other.

Endnotes

1. With respect to the licensing of facilities, see RCW 70.129.010(4) and sources cited therein. Residents of such facilities are protected under Washington's "long-term care resident rights" laws. See RCW 70.129.005 *et seq.*
2. Pursuant to RCW 11.130.010(11), "Guardian" means a person appointed by the court to make decisions with respect to the personal affairs of an individual." With respect to the certification of professional guardians, see RCW 11.130.010 *et seq.*; GR 23.
3. Pursuant to RCW 11.130.010(5), "Conservator" means a person appointed by a court to make decisions with respect to the property or financial affairs of an individual subject to conservatorship." With respect to the appointment of conservators, see RCW 11.130.360 *et seq.*; GR 23.
4. As with any other matter, the lawyer must be satisfied that the goals and objectives that the facility wishes to pursue and how they are to be pursued are legally appropriate. See, e.g., RPC 1.2(a), (d). We therefore assume that the facility's (and the lawyer's) support for the appointment of a particular CPG or conservator is made in good faith and is not the result of an unlawful *quid pro quo* or side deal between the facility and the CPG or conservator.

5. Potential sources of law on these issues include but are not necessarily limited to RCW 70.129; RCW 74.34; RCW 11.130; 45 CFR Parts 160 and 164; and 42 CFR Part 482.
6. Conflicts of interest could also result from a lawyer's decision to exercise the right make disclosures adverse to client interests under sections including RPC 1.6(b)(8).
7. Under RPC 1.10(a), the conflicts of interest addressed in this opinion would apply to all lawyers working for any of these clients at a single firm.

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

Financial Reports

(Unaudited)

Year to Date February 28, 2025

Prepared by
Maggie Yu, Controller

Submitted by
Tiffany Lynch, Director of Finance
March 19, 2025

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 February 28,
2025 As % of Completion to Annual Budget

	% of Year	Current Year % YTD	Current Year \$ Difference Favorable/(Unfavorable)	Prior Year YTD	Comments
Total Salaries & Benefits	42%	41%	\$39,620	42%	Favorable to budget mainly due to timing of taxes and benefits payments and higher capital labor.
Other Indirect Expenses*	42%	44%	(\$88,161)	41%	Unfavorable to budget due to timing of payments for online legal research, office downsizing expenses, audit fees, IT costs, rent and unanticipated software depreciation.
Total Indirect Expenses	42%	42%	(\$48,541)	42%	Unfavorable to budget resulting from other indirect expenses described above.

General Fund Revenues	42%	45%	\$768,508	46%	Favorable to budget due to timing of fee collection for the summer bar exam, law clerks, and MCLE. Additional revenue from interest income, and sales for new members and legal lunchbox products.
General Fund Indirect Expenses	42%	42%	(\$30,882)	41%	Unfavorable to budget as described for indirect expenses above.
General Fund Direct Expenses	42%	30%	\$369,497	24%	Favorable to budget due to timing of program activities and meetings/events.
General Fund Net	42%	-134%	\$1,107,123	118%	Favorable to budget for the reasons described above.

CLE Revenue	42%	43%	\$18,909	58%	Favorable to budget due to seasonally high product sales.
CLE Direct Expenses	42%	12%	\$105,704	17%	Favorable to budget due to timing of expenses for seminar activities and product sales.
CLE Indirect Expenses	42%	43%	(\$17,052)	43%	Unfavorable to budget due to timing of payment of other indirect expenses.
CLE Net	42%	207%	\$107,561	260%	Favorable to budget primarily due to timing of direct expenses and product sales.

*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
Analysis of Cash Investments
As of February 28, 2025**

Checking & Savings Accounts

General Fund

Checking

<u>Bank</u>	<u>Account</u>	<u>Amount</u>
Wells Fargo	General	1,407,706

Total

<u>Investments</u>	<u>Rate (yield)</u>	<u>Amount</u>
Wells Fargo Money Market	4.30%	16,450,227
UBS Financial Money Market	4.34%	1,167,941
CDs/Treasuries	see list	9,219,260

General Fund Total 28,245,134

Client Protection Fund

Checking

<u>Bank</u>	<u>Amount</u>
Wells Fargo	371,991

<u>Investments</u>	<u>Rate (yield)</u>	<u>Amount</u>
Wells Fargo Money Market	4.30%	2,611,091
CDs/Treasuries	see list	2,712,159

Client Protection Fund Total 5,695,240

Grand Total Cash & Investments 33,940,374

**Washington State Bar Association
Analysis of Cash Investments
As of February 28, 2025**

General Fund

<u>Bank</u>	<u>Yield</u>	<u>Term Months</u>	<u>Trade Date</u>	<u>Settle Date</u>	<u>Maturity Date</u>	<u>Amount</u>
Cambridge Saving Bank CD	5.35%	9	6/11/2024	6/20/2024	3/17/2025	240,000
Beal Bank USA CD	5.00%	12	3/12/2024	3/20/2024	3/19/2025	250,000
Beal Bank Plano TX CD	5.00%	12	3/26/2024	4/3/2024	4/2/2025	250,000
Old National BK CD	5.00%	12	3/26/2024	4/4/2024	4/4/2025	250,000
Exchange Bank CD	5.00%	12	4/16/2024	4/24/2024	4/23/2025	250,000
Northside Community Bank CD	5.00%	12	4/16/2024	4/24/2024	4/24/2025	250,000
CF Bank CD	5.05%	12	4/26/2024	5/3/2024	5/2/2025	250,000
Morgan Stanley Bank CD	5.10%	12	5/2/2024	5/8/2024	5/8/2025	250,000
Meridian Bank CD	5.10%	12	5/9/2024	5/15/2024	5/15/2025	250,000
Morgan Stanley PVT Bank CD	5.15%	12	5/9/2024	5/15/2024	5/15/2025	250,000
City National Bank of FL CD	4.15%	9	10/10/2024	10/16/2024	7/16/2025	250,000
Bank of America Calif CD	4.10%	9	10/10/2024	10/17/2024	7/17/2025	250,000
Western Alliance Bank CD	4.10%	9	10/10/2024	10/18/2024	7/18/2025	250,000
Cross River Bank CD	4.30%	9	11/19/2024	11/22/2024	8/22/2025	250,000
US Bank NA Cincinnati CD	4.40%	9	11/19/2024	11/26/2024	8/26/2025	250,000
BMO bank NA CD	4.30%	9	11/26/2024	11/29/2024	8/29/2025	250,000
HomeTrust Bank CD	4.15%	9	12/31/2024	1/9/2025	10/9/2025	250,000
Tompkins Community Bank CD	4.10%	9	1/7/2025	1/17/2025	10/17/2025	250,000
Needham Bank CD	4.10%	9	1/16/2025	1/24/2025	10/24/2025	250,000
Dogwood St Bank CD	4.20%	9	1/16/2025	1/28/2025	10/28/2025	250,000
First Bank Chicago CD	4.20%	12	11/26/2024	11/27/2024	11/26/2025	250,000
Bank of India NY CD	4.10%	11	12/17/2024	12/27/2024	12/3/2025	250,000
Federal Farm Credit Bank CD	4.25%	12	12/17/2024	12/20/2024	12/19/2025	250,243
Stearns Bank CD	4.15%	12	12/12/2024	12/23/2024	12/23/2025	250,000
Regions Bank CD	4.10%	12	12/31/2024	1/8/2025	1/8/2026	250,000
TowneBank Portsmouth CD	4.10%	12	12/31/2024	1/10/2025	1/9/2026	250,000
First Reliance Bank CD	4.25%	12	2/21/2025	2/26/2025	2/25/2026	250,000
Bank of NY Mellon CD	4.20%	12	2/21/2025	2/26/2025	2/26/2026	250,000

US T- Bill's

US Treasury Bill	4.40%	4	11/19/2024	11/20/2024	3/18/2025	246,493
US Treasury Bill	4.60%	6	10/10/2024	10/11/2024	4/10/2025	244,781
US Treasury Bill	4.20%	4	12/17/2024	12/18/2024	4/15/2025	246,651
US Treasury Bill	4.15%	4	1/7/2025	1/8/2025	5/6/2025	246,689
US Treasury Bill	4.20%	6	12/12/2024	12/13/2024	6/12/2025	244,897
US Treasury Bill	4.12%	6	12/31/2024	1/2/2025	7/3/2025	244,967
US Treasury Bill	4.22%	6	2/21/2025	2/24/2025	8/31/2025	514,177
US Treasury Bill	4.3%	11	11/26/2024	11/27/2024	10/30/2025	240,364

Total	9,219,260
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**Washington State Bar Association
Analysis of Cash Investments
As of February 28, 2025**

Client Fund Protection Fund

<u>Bank</u>	<u>Yield</u>	<u>Term Months</u>	<u>Trade Date</u>	<u>Settle Date</u>	<u>Maturity Date</u>	<u>Amount</u>
Goldman Sachs Bank CD	5.00%	9	7/12/2024	7/23/2024	4/23/2025	250,000
FirstBank Nashville CD	5.15%	12	5/14/2024	5/17/2024	5/16/2025	250,000
Ally Bank CD	4.05%	9	10/10/2024	10/17/2024	7/17/2025	250,000
Dollar Bank CD	4.15%	12	12/12/2024	12/20/2024	12/19/2025	250,000
Bank of American NA CD	4.35%	12	1/16/2025	1/24/2025	1/23/2026	250,000

US T- Bill's

US Treasury Bill	4.50%	6	9/13/2024	9/16/2024	3/13/2025	244,632
US Treasury Bill	4.30%	6	10/10/2024	10/11/2024	4/10/2025	244,781
US Treasury Bill	4.35%	10	8/27/2024	8/28/2024	6/12/2025	241,640
US Treasury Bill	4.20%	6	2/21/2025	2/24/2025	8/21/2025	489,963
US Treasury Bill	4.30%	10	11/26/2024	11/27/2024	10/2/2025	241,143

Total	<u>2,712,159</u>
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Washington State Bar Association

Statement of Activities
For the Period from February 1, 2025 to February 28, 2025
42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LICENSE FEES						
REVENUE:						
LICENSE FEES	17,492,616	1,851,539	7,195,708	10,296,908	41%	(92,882)
TOTAL REVENUE:	<u><u>17,492,616</u></u>	<u><u>1,851,539</u></u>	<u><u>7,195,708</u></u>	<u><u>10,296,908</u></u>	<u><u>41%</u></u>	<u><u>(92,882)</u></u>

Washington State Bar Association

Statement of Activities

For the Period from February 1, 2025 to February 28, 2025

42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ADMISSIONS						
REVENUE:						
EXAM SOFTWARE REVENUE	27,500	-	-	27,500	0%	(11,458)
BAR EXAM FEES	1,378,980	214,800	755,265	623,715	55%	180,690
RULE 9/LEGAL INTERN FEES	12,500	450	2,350	10,150	19%	(2,858)
SPECIAL ADMISSIONS	61,200	4,525	24,435	36,765	40%	(1,065)
TOTAL REVENUE:	1,480,180	219,775	782,050	698,130	53%	165,308
DIRECT EXPENSES:						
POSTAGE	2,000	173	1,641	359	82%	(808)
STAFF TRAVEL/PARKING	24,000	1,980	1,998	22,002	8%	8,002
STAFF MEMBERSHIP DUES	495	-	245	250	49%	(39)
SUPPLIES	2,000	-	2,720	(720)	136%	(1,887)
FACILITY, PARKING, FOOD	100,000	44,184	44,184	55,816	44%	(2,517)
EXAMINER FEES	44,500	12,750	21,750	22,750	49%	(3,208)
UBE EXMINATIONS	118,000	-	-	118,000	0%	49,167
BOARD OF BAR EXAMINERS	42,500	-	-	42,500	0%	17,708
BAR EXAM PROCTORS	23,000	-	-	23,000	0%	9,583
DISABILITY ACCOMMODATIONS	65,000	-	1,975	63,025	3%	25,108
CHARACTER & FITNESS INVESTIGATIONS	1,000	-	700	300	70%	(283)
LAW SCHOOL VISITS	2,000	-	-	2,000	0%	833
SOFTWARE HOSTING	45,609	3,653	18,405	27,204	40%	599
STAFF CONFERENCE & TRAINING	10,100	-	4,302	5,798	43%	(94)
TOTAL DIRECT EXPENSES:	480,204	62,740	97,920	382,284	20%	102,165
INDIRECT EXPENSES:						
SALARY EXPENSE (6.65 FTE)	551,588	46,604	233,496	318,092	42%	(3,667)
BENEFITS EXPENSE	194,873	15,946	78,526	116,347	40%	2,671
OTHER INDIRECT EXPENSE	159,666	13,877	70,526	89,140	44%	(3,999)
TOTAL INDIRECT EXPENSES:	906,127	76,427	382,548	523,580	42%	(4,995)
TOTAL ALL EXPENSES:	1,386,331	139,167	480,468	905,864	35%	97,170
NET INCOME (LOSS):	93,849	80,608	301,582	(207,734)	321%	262,479

Washington State Bar Association

Statement of Activities

For the Period from February 1, 2025 to February 28, 2025

42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ADVANCEMENT FTE						
REVENUE:						
TOTAL REVENUE:	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>		<u>-</u>
DIRECT EXPENSES:						
STAFF CONFERENCE & TRAINING	3,300	-	120	3,180	4%	1,255
TOTAL DIRECT EXPENSES:	<u>3,300</u>	<u>-</u>	<u>120</u>	<u>3,180</u>	<u>4%</u>	<u>1,255</u>
INDIRECT EXPENSES:						
SALARY EXPENSE (1.96 FTE)	264,525	21,518	107,936	156,589	41%	2,283
BENEFITS EXPENSE	74,703	6,060	29,869	44,834	40%	1,257
OTHER INDIRECT EXPENSE	47,060	4,092	20,798	26,261	44%	(1,190)
TOTAL INDIRECT EXPENSES:	<u>386,288</u>	<u>31,671</u>	<u>158,603</u>	<u>227,685</u>	<u>41%</u>	<u>2,350</u>
TOTAL ALL EXPENSES:	<u>389,588</u>	<u>31,671</u>	<u>158,723</u>	<u>230,865</u>	<u>41%</u>	<u>3,605</u>
NET INCOME (LOSS):	<u>(389,588)</u>	<u>(31,671)</u>	<u>(158,723)</u>	<u>(230,865)</u>	<u>41%</u>	<u>3,605</u>

Washington State Bar Association
Statement of Activities
For the Period from February 1, 2025 to February 28, 2025
42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ACCESS TO JUSTICE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
ATJ BOARD RETREAT	6,000	-	2,371	3,629	40%	129
LEADERSHIP TRAINING	6,000	199	1,624	4,376	27%	876
ATJ BOARD EXPENSE	58,500	5,232	26,167	32,333	45%	(1,792)
STAFF TRAVEL/PARKING	2,800	36	295	2,505	11%	872
STAFF CONFERENCE & TRAINING	2,495	-	1,530	965	61%	(491)
PUBLIC DEFENSE	4,000	-	2,279	1,721	57%	(613)
CONFERENCE/INSTITUTE EXPENSE	30,000	-	19,167	10,833	64%	(6,667)
RECEPTION/FORUM EXPENSE	30,000	7,153	12,470	17,530	42%	30
TOTAL DIRECT EXPENSES:	139,795	12,620	65,904	73,891	47%	(7,656)
INDIRECT EXPENSES:						
SALARY EXPENSE (1.68 FTE)	157,861	12,973	65,688	92,174	42%	88
BENEFITS EXPENSE	52,337	4,248	21,053	31,283	40%	754
OTHER INDIRECT EXPENSE	40,337	3,508	17,827	22,510	44%	(1,020)
TOTAL INDIRECT EXPENSES:	250,535	20,729	104,568	145,967	42%	(178)
TOTAL ALL EXPENSES:	390,330	33,349	170,472	219,858	44%	(7,835)
NET INCOME (LOSS):	(390,330)	(33,349)	(170,472)	(219,858)	44%	(7,835)

Washington State Bar Association

Statement of Activities

For the Period from February 1, 2025 to February 28, 2025

42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
BAR NEWS						
REVENUE:						
ROYALTIES	2,000	-	-	2,000	0%	(833)
DISPLAY ADVERTISING	405,000	51,872	192,397	212,603	48%	23,647
SUBSCRIPT/SINGLE ISSUES	100	-	72	28	72%	30
CLASSIFIED ADVERTISING	2,500	456	1,919	581	77%	877
JOB TARGET ADVERTISING	180,000	7,877	35,540	144,460	20%	(39,460)
TOTAL REVENUE:	589,600	60,205	229,928	359,672	39%	(15,739)
DIRECT EXPENSES:						
POSTAGE	121,000	15,585	60,779	60,221	50%	(10,363)
PRINTING, COPYING & MAILING	262,500	22,522	94,212	168,288	36%	15,163
DIGITAL/ONLINE DEVELOPMENT	2,000	572	572	1,428	29%	262
GRAPHICS/ARTWORK	1,000	-	-	1,000	0%	417
EDITORIAL ADVISORY COMMITTEE	300	-	-	300	0%	125
STAFF MEMBERSHIP DUES	150	-	-	150	0%	63
SUBSCRIPTIONS	225	-	204	21	91%	(111)
TOTAL DIRECT EXPENSES:	387,175	38,678	155,767	231,408	40%	5,556
INDIRECT EXPENSES:						
SALARY EXPENSE (2.13 FTE)	207,867	15,952	90,089	117,778	43%	(3,478)
BENEFITS EXPENSE	67,753	5,282	26,744	41,010	39%	1,487
OTHER INDIRECT EXPENSE	51,141	4,431	22,518	28,623	44%	(1,209)
TOTAL INDIRECT EXPENSES:	326,761	25,665	139,351	187,411	43%	(3,200)
TOTAL ALL EXPENSES:	713,936	64,343	295,117	418,819	41%	2,356
NET INCOME (LOSS):	(124,336)	(4,138)	(65,190)	(59,146)	52%	(13,383)

Washington State Bar Association
Statement of Activities
For the Period from February 1, 2025 to February 28, 2025
42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
BOARD OF GOVERNORS						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
BOG MEETINGS	148,000	1,594	27,030	120,970	18%	34,636
BOG COMMITTEES' EXPENSES **	8,500	62	3,690	4,810	43%	(148)
BOG RETREAT	40,000	222	37,967	2,033	95%	(21,300)
BOG CONFERENCE ATTENDANCE	39,500	2,637	5,220	34,280	13%	11,238
BOG TRAVEL & OUTREACH	50,000	1,253	7,976	42,024	16%	12,857
LEADERSHIP TRAINING	15,000	-	-	15,000	0%	6,250
BOG ELECTIONS	42,000	4,018	4,018	37,982	10%	13,482
PRESIDENT'S DINNER	10,000	-	0	10,000	0%	4,167
NEW GOVERNOR ORIENTATION **	3,500	-	-	3,500	0%	1,458
PRESIDENT'S PHOTO	3,300	-	-	3,300	0%	1,375
SUPPLIES	500	-	73	427	15%	135
TOTAL DIRECT EXPENSES:	360,300	9,785	85,974	274,326	24%	64,151
INDIRECT EXPENSES:						
SALARY EXPENSE (1.73 FTE) **	132,168	10,667	51,294	80,874	39%	3,776
BENEFITS EXPENSE **	48,740	4,967	18,823	29,916	39%	1,485
OTHER INDIRECT EXPENSE **	41,537	5,709	18,311	23,226	44%	(1,004)
TOTAL INDIRECT EXPENSES:	222,445	21,343	88,429	134,016	40%	4,257
TOTAL ALL EXPENSES:	582,745	31,128	174,403	408,342	30%	68,408
NET INCOME (LOSS):	(582,745)	(31,128)	(174,403)	(408,342)	30%	68,408

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association
Statement of Activities
For the Period from February 1, 2025 to February 28, 2025
42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CHARACTER & FITNESS BOARD						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CHARACTER & FITNESS BOARD EXP	18,000	-	3,022	14,978	17%	4,478
COURT REPORTERS	15,000	-	3,096	11,904	21%	3,154
TOTAL DIRECT EXPENSES:	33,000	-	6,118.21	26,882	19%	7,632
INDIRECT EXPENSES:						
SALARY EXPENSE (0.75 FTE)	95,315	7,896	39,966	55,349	42%	(251)
BENEFITS EXPENSE	27,582	2,265	11,222	16,360	41%	271
OTHER INDIRECT EXPENSE	18,007	1,569	7,975	10,032	44%	(472)
TOTAL INDIRECT EXPENSES:	140,905	11,730	59,163	81,742	42%	(453)
TOTAL ALL EXPENSES:	173,905	11,730	65,281	108,624	38%	7,179
NET INCOME (LOSS):	(173,905)	(11,730)	(65,281)	(108,624)	38%	7,179

Washington State Bar Association
Statement of Activities
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42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CONTINUING LEGAL EDUCATION (CLE)						
(CLES - CLEP)						
REVENUE:						
SEMINAR REGISTRATIONS	825,000	31,662	191,197	633,803	23%	(152,553)
SEMINAR REVENUE-OTHER	20,000	-	800	19,200	4%	(7,533)
SEMINAR SPLITS W/ CLE	(150,000)	-	-	(150,000)	0%	62,500
SHIPPING & HANDLING	210	-	81	129	39%	(7)
COURSEBOOK SALES	3,500	-	555	2,945	16%	(903)
MP3 AND VIDEO SALES	925,000	25,337	538,560	386,440	58%	153,143
TOTAL REVENUE:	1,623,710	56,999	731,192	892,518	45%	(97,587)
DIRECT EXPENSES:						
COURSEBOOK PRODUCTION	500	-	-	500	0%	208
DEPRECIATION	2,012	170	850	1,162	42%	(12)
ONLINE EXPENSES	54,000	1,839	19,858	34,142	37%	2,642
ACCREDITATION FEES	3,000	(24)	2,172	828	72%	(922)
FACILITIES	165,000	2,400	20,970	144,030	13%	47,780
DISABILITY ACCOMMODATIONS	7,000	-	-	7,000	0%	2,917
SPEAKERS & PROGRAM DEVELOP	48,000	-	766	47,234	2%	19,234
HONORARIA	3,000	-	-	3,000	0%	1,250
CLE SEMINAR COMMITTEE	200	-	-	200	0%	83
STAFF TRAVEL/PARKING	15,000	-	53	14,947	0%	6,197
STAFF CONFERENCE & TRAINING	5,900	-	-	5,900	0%	2,458
STAFF MEMBERSHIP DUES	1,500	-	-	1,500	0%	625
SUPPLIES	500	-	-	500	0%	208
COST OF SALES - COURSEBOOKS	300	-	38	262	13%	87
POSTAGE & DELIVERY-COURSEBOOKS	200	-	31	169	16%	52
TOTAL DIRECT EXPENSES:	306,112	4,385	44,739	261,373	15%	82,808
INDIRECT EXPENSES:						
SALARY EXPENSE (8.00 FTE)	630,924	50,626	254,640	376,284	40%	8,245
BENEFITS EXPENSE	228,691	18,251	90,349	138,342	40%	4,939
OTHER INDIRECT EXPENSE	192,080	16,677	84,757	107,323	44%	(4,723)
TOTAL INDIRECT EXPENSES:	1,051,695	85,554	429,745	621,949	41%	8,461
TOTAL ALL EXPENSES:	1,357,807	89,939	474,484	883,322	35%	91,268
NET INCOME (LOSS):	265,904	(32,940)	256,708	9,196	97%	145,915

Washington State Bar Association
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42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CLIENT PROTECTION FUND						
REVENUE:						
CPF RESTITUTION	10,000	521	16,197	(6,197)	162%	12,030
CPF MEMBER ASSESSMENTS	720,540	87,340	683,445	37,095	95%	383,220
INTEREST INCOME	200,000	17,929	88,471	111,529	44%	5,138
TOTAL REVENUE:	930,540	105,791	788,113	142,427	85%	400,388
DIRECT EXPENSES:						
BANK FEES	2,500	(243)	(2,162)	4,662	-86%	3,204
GIFTS TO INJURED CLIENTS	500,000	2,800	(163,680)	663,680	-33%	372,013
CPF BOARD EXPENSES	2,000	144	144	1,856	7%	690
STAFF CONFERENCE & TRAINING	1,700	-	-	1,700	0%	708
STAFF MEMBERSHIP DUES	200	-	-	200	0%	83
TOTAL DIRECT EXPENSES:	506,400	2,701	(165,698)	672,098	-33%	376,698
INDIRECT EXPENSES:						
SALARY EXPENSE (1.23 FTE)	115,160	9,573	48,447	66,713	42%	(464)
BENEFITS EXPENSE	38,272	3,114	15,416	22,856	40%	531
OTHER INDIRECT EXPENSE	29,532	2,554	12,979	16,553	44%	(674)
TOTAL INDIRECT EXPENSES:	182,964	15,241	76,842	106,122	42%	(607)
TOTAL ALL EXPENSES:	689,364	17,942	(88,856)	778,220	-13%	376,091
NET INCOME (LOSS):	241,176	87,848	876,969	(635,794)	364%	776,479

Washington State Bar Association
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42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
COMMUNICATION STRATEGIES						
REVENUE:						
50 YEAR MEMBER TRIBUTE LUNCH	100	-	-	100	0%	(42)
WSBA LOGO MERCHANDISE SALES	500	-	-	500	0%	(208)
TOTAL REVENUE:	600	-	-	600	0%	(250)
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	5,895	198	913	4,982	15%	1,543
STAFF MEMBERSHIP DUES	1,800	-	-	1,800	0%	750
SUBSCRIPTIONS	4,000	103	539	3,461	13%	1,128
APEX DINNER	52,500	-	-	52,500	0%	21,875
BAR LEADERS SUMMIT	35,000	-	-	35,000	0%	14,583
50 YEAR MEMBER TRIBUTE LUNCH	35,000	-	-	35,000	0%	14,583
BAR OUTREACH	20,000	-	74	19,926	0%	8,259
COMMUNICATIONS OUTREACH	15,000	131	1,587	13,413	11%	4,663
STAFF CONFERENCE & TRAINING	11,100	-	8,721	2,379	79%	(4,096)
TOTAL DIRECT EXPENSES:	180,295	432	11,834	168,461	7%	63,289
INDIRECT EXPENSES:						
SALARY EXPENSE (5.39 FTE) **	426,569	35,612	148,554	278,015	35%	29,183
BENEFITS EXPENSE **	154,335	10,404	57,087	97,249	37%	7,220
OTHER INDIRECT EXPENSE **	129,414	7,014	57,174	72,240	44%	(3,251)
TOTAL INDIRECT EXPENSES:	710,318	53,029	262,814	447,504	37%	33,152
TOTAL ALL EXPENSES:	890,613	53,462	274,648	615,965	31%	96,441
NET INCOME (LOSS):	(890,013)	(53,462)	(274,648)	(615,365)	31%	96,191

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association
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42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
COMMUNICATION STRATEGIES FTE						
INDIRECT EXPENSES:						
SALARY EXPENSE (1.00 FTE)	179,737	18,089	78,932	100,805	44%	(4,041)
BENEFITS EXPENSE	45,265	4,333	19,314	25,951	43%	(454)
OTHER INDIRECT EXPENSE	24,010	2,092	10,634	13,376	44%	(630)
TOTAL INDIRECT EXPENSES:	<u>249,012</u>	<u>24,515</u>	<u>108,879</u>	<u>140,133</u>	<u>44%</u>	<u>(5,124)</u>
NET INCOME (LOSS):	<u>(249,012)</u>	<u>(24,515)</u>	<u>(108,879)</u>	<u>(140,133)</u>	<u>44%</u>	<u>(5,124)</u>

Washington State Bar Association

Statement of Activities

For the Period from February 1, 2025 to February 28, 2025

42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DESKBOOKS						
REVENUE:						
DESKBOOK SALES	30,000	-	-	30,000	0%	(12,500)
LEXIS/NEXIS ROYALTIES	75,000	10,634	10,634	64,366	14%	(20,616)
SECTION PUBLICATION SALES	1,000	-	-	1,000	0%	(417)
FASTCASE ROYALTIES	25,000	8,212	8,212	16,788	33%	(2,205)
TOTAL REVENUE:	131,000	18,845	18,845	112,155	14%	(35,738)
DIRECT EXPENSES:						
COST OF SALES - DESKBOOKS	5,000	-	-	5,000	0%	2,083
COST OF SALES - SECTION PUBLICATION	500	-	-	500	0%	208
SPLITS TO SECTIONS	300	-	-	300	0%	125
DESKBOOK ROYALTIES	300	-	-	300	0%	125
POSTAGE & DELIVER-DESKBOOKS	300	-	-	300	0%	125
OBSOLETE INVENTORY	48,250	-	-	48,250	0%	20,104
STAFF MEMBERSHIP DUES	250	-	-	250	0%	104
SUBSCRIPTIONS	50	-	-	50	0%	21
TOTAL DIRECT EXPENSES:	54,950	-	-	54,950	0%	22,896
INDIRECT EXPENSES:						
SALARY EXPENSE (1.75 FTE)	178,087	13,459	98,418	79,669	55%	(24,215)
BENEFITS EXPENSE	56,847	4,419	23,883	32,964	42%	(197)
OTHER INDIRECT EXPENSE	42,017	3,662	18,609	23,409	44%	(1,102)
TOTAL INDIRECT EXPENSES:	276,952	21,539	140,910	136,042	51%	(25,513)
TOTAL ALL EXPENSES:	331,902	21,539	140,910	190,992	42%	(2,617)
NET INCOME (LOSS):	(200,902)	(2,694)	(122,064)	(78,838)	61%	(38,355)

Washington State Bar Association
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For the Period from February 1, 2025 to February 28, 2025
42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DISCIPLINE						
REVENUE:						
AUDIT REVENUE	1,000	170	213	788	21%	(204)
RECOVERY OF DISCIPLINE COSTS	70,000	1,030	28,327	41,673	40%	(840)
DISCIPLINE HISTORY SUMMARY	19,000	2,040	8,880	10,120	47%	963
TOTAL REVENUE:	90,000	3,240	37,420	52,580	42%	(80)
DIRECT EXPENSES:						
DEPRECIATION-SOFTWARE	24,259	-	-	24,259	0%	10,108
PUBLICATIONS PRODUCTION	350	-	-	350	0%	146
STAFF TRAVEL/PARKING	25,000	525	4,204	20,796	17%	6,212
STAFF MEMBERSHIP DUES	7,090	-	6,308	782	89%	(3,354)
TELEPHONE	4,000	196	921	3,079	23%	745
COURT REPORTERS	60,000	9,949	25,719	34,281	43%	(719)
OUTSIDE COUNSEL/AIC	1,000	-	-	1,000	0%	417
LITIGATION EXPENSES	40,000	517	3,676	36,324	9%	12,991
DISABILITY EXPENSES	5,500	-	3,649	1,851	66%	(1,358)
TRANSLATION SERVICES	12,000	255	1,238	10,763	10%	3,763
STAFF CONFERENCE & TRAINING	37,345	8,006	12,476	24,869	33%	3,084
TOTAL DIRECT EXPENSES:	216,544	19,447	58,191	158,353	27%	32,036
INDIRECT EXPENSES:						
SALARY EXPENSE (39.00 FTE)	4,063,643	319,107	1,655,684	2,407,960	41%	37,501
BENEFITS EXPENSE	1,275,677	101,298	510,138	765,539	40%	21,394
OTHER INDIRECT EXPENSE	936,389	81,356	413,462	522,928	44%	(23,300)
TOTAL INDIRECT EXPENSES:	6,275,710	501,761	2,579,284	3,696,426	41%	35,595
TOTAL ALL EXPENSES:	6,492,254	521,209	2,637,475	3,854,779	41%	67,631
NET INCOME (LOSS):	(6,402,254)	(517,969)	(2,600,055)	(3,802,199)	41%	67,551

Washington State Bar Association

Statement of Activities

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42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DIVERSITY						
REVENUE:						
DONATIONS	135,000	39,916	39,916	95,084	30%	(16,334)
TOTAL REVENUE:	135,000	39,916	39,916	95,084	30%	(16,334)
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,700	-	211	3,489	6%	1,331
STAFF MEMBERSHIP DUES	700	390	480	220	69%	(188)
DEI COUNCIL	5,900	199	279	5,621	5%	2,180
DIVERSITY EVENTS & PROJECTS	43,100	6	3,675	39,425	9%	14,283
INTERNAL DIVERSITY OUTREACH	7,500	-	-	7,500	0%	3,125
STAFF CONFERENCE & TRAINING	3,000	-	162	2,838	5%	1,088
CONSULTING SERVICES	7,000	-	45	6,955	1%	2,872
TOTAL DIRECT EXPENSE:	70,900	595	4,852	66,048	7%	24,689
INDIRECT EXPENSES:						
SALARY EXPENSE (2.69 FTE)	227,749	18,592	92,910	134,839	41%	1,986
BENEFITS EXPENSE	79,569	6,402	31,564	48,004	40%	1,589
OTHER INDIRECT EXPENSE	64,587	5,600	28,461	36,126	44%	(1,549)
TOTAL INDIRECT EXPENSES:	371,905	30,595	152,935	218,970	41%	2,025
TOTAL ALL EXPENSES:	442,805	31,190	157,787	285,017	36%	26,715
NET INCOME (LOSS):	(307,805)	8,726	(117,872)	(189,933)	38%	10,380

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ETHICS, WELLNESS, & PRACTICE (MWP-PMA-PRP)						
REVENUE:						
DIVERSIONS	10,000	-	1,500	8,500	15%	(2,667)
ROYALTIES	62,000	16,582	33,061	28,939	53%	7,228
TOTAL REVENUE:	72,000	16,582	34,561	37,439	48%	4,561
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	1,450	-	965	485	67%	(361)
MEMBER WELLNESS COUNCIL	4,250	-	1,042	3,208	25%	729
LEGAL TECH TASK FORCE	5,000	-	2,750	2,250	55%	(667)
STAFF TRAVEL/PARKING	5,000	265	689	4,311	14%	1,394
STAFF CONFERENCE & TRAINING	9,100	-	222	8,878	2%	3,570
SUBSCRIPTIONS	1,455	110	552	903	38%	55
CPE COMMITTEE	1,000	-	286	714	29%	130
FASTCASE	85,000	-	84,568	432	99%	(49,152)
TOTAL DIRECT EXPENSES:	112,255	375	91,074	21,181	81%	(44,301)
INDIRECT EXPENSES:						
SALARY EXPENSE (3.51 FTE)	376,056	31,342	157,613	218,443	42%	(923)
BENEFITS EXPENSE	117,836	9,592	47,363	70,474	40%	1,736
OTHER INDIRECT EXPENSE	84,275	7,292	37,061	47,214	44%	(1,947)
TOTAL INDIRECT EXPENSES:	578,168	48,226	242,037	336,130	42%	(1,134)
TOTAL ALL EXPENSES:	690,423	48,601	333,111	357,311	48%	(45,435)
NET INCOME (LOSS):	(618,423)	(32,020)	(298,550)	(319,873)	48%	(40,874)

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
FINANCE						
REVENUE:						
INTEREST INCOME	600,000	70,626	289,109	310,891	48%	39,109
TOTAL REVENUE:	600,000	70,626	289,109	310,891	48%	39,109
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,750	754	2,156	1,594	57%	(594)
STAFF CONFERENCE & TRAINING	500	-	303	197	61%	(95)
STAFF MEMBERSHIP DUES	670	-	-	670	0%	279
TOTAL DIRECT EXPENSES:	4,920	754	2,460	2,460	50%	(410)
INDIRECT EXPENSES:						
SALARY EXPENSE (6.92 FTE)	755,465	68,954	331,414	424,051	44%	(16,637)
BENEFITS EXPENSE	233,179	19,820	96,533	136,646	41%	625
OTHER INDIRECT EXPENSE	166,149	14,431	73,341	92,808	44%	(4,112)
TOTAL INDIRECT EXPENSES:	1,154,793	103,204	501,288	653,505	43%	(20,124)
TOTAL ALL EXPENSES:	1,159,713	103,958	503,747	655,965	43%	(20,534)
NET INCOME (LOSS):	(559,713)	(33,332)	(214,638)	(345,075)	38%	18,576

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
FOUNDATION						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	3,200	-	3,200	-	100%	(1,867)
PRINTING & COPYING	1,000	-	-	1,000	0%	417
STAFF TRAVEL/PARKING	3,000	-	-	3,000	0%	1,250
SUPPLIES	2,000	-	-	2,000	0%	833
BOARD OF TRUSTEES	3,600	-	62	3,538	2%	1,438
EQUIPMENT/HARDWARE/SOFTWARE	2,400	220	1,098	1,302	46%	(98)
POSTAGE	400	-	-	400	0%	167
STAFF CONFERENCE & TRAINING	2,200	-	-	2,200	0%	917
TOTAL DIRECT EXPENSES:	17,800	220	4,360	13,440	24%	3,057
INDIRECT EXPENSES:						
SALARY EXPENSE (1.05 FTE)	106,460	8,787	44,482	61,977	42%	(124)
BENEFITS EXPENSE	34,056	2,759	13,721	20,335	40%	469
OTHER INDIRECT EXPENSE	25,210	2,185	11,103	14,108	44%	(598)
TOTAL INDIRECT EXPENSES:	165,726	13,731	69,306	96,420	42%	(253)
TOTAL ALL EXPENSES:	183,526	13,950	73,666	109,860	40%	2,803
NET INCOME (LOSS):	(183,526)	(13,950)	(73,666)	(109,860)	40%	2,803

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
HUMAN RESOURCES						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	300	-	15	285	5%	110
STAFF MEMBERSHIP DUES	1,000	-	528	472	53%	(111)
SUBSCRIPTIONS	2,000	-	993	1,007	50%	(160)
STAFF TRAINING- GENERAL	36,800	281	727	36,073	2%	14,606
RECRUITING AND ADVERTISING	8,000	120	1,985	6,015	25%	1,348
PAYROLL PROCESSING	50,000	5,244	24,799	25,201	50%	(3,966)
SALARY SURVEYS	1,000	-	-	1,000	0%	417
CONSULTING SERVICES	10,000	-	-	10,000	0%	4,167
STAFF CONFERENCE & TRAINING	2,200	-	171	2,029	8%	745
TRANSFER TO INDIRECT EXPENSE	(111,300)	(5,645)	(29,219)	(82,081)	26%	(17,156)
TOTAL DIRECT EXPENSES:	-	-	-	-		-
INDIRECT EXPENSES:						
SALARY EXPENSE (4.00 FTE)	565,461	46,923	243,501	321,959	43%	(7,893)
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(83,333)
BENEFITS EXPENSE	113,451	12,045	58,829	54,622	52%	(11,558)
OTHER INDIRECT EXPENSE	96,040	8,339	42,378	53,662	44%	(2,362)
TOTAL INDIRECT EXPENSES:	574,952	67,307	344,709	230,243	60%	(105,146)
TOTAL ALL EXPENSES:	574,952	67,307	344,709	230,243	60%	(105,146)
NET INCOME (LOSS):	(574,952)	(67,307)	(344,709)	(230,243)	60%	(105,146)

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LAW CLERK PROGRAM						
REVENUE:						
LAW CLERK FEES	204,000	35,660	230,160	(26,160)	113%	145,160
LAW CLERK APPLICATION FEES	3,200	300	2,300	900	72%	967
TOTAL REVENUE:	207,200	35,960	232,460	(25,260)	112%	146,126
DIRECT EXPENSES:						
SUBSCRIPTIONS	250	-	-	250	0%	104
DEPRECIATION	12,000	-	-	12,000	0%	5,000
CHARACTER & FITNESS INVESTIGATIONS	100	-	-	100	0%	42
LAW CLERK BOARD EXPENSE	8,000	173	1,613	6,387	20%	1,721
SOFTWARE HOSTING	681	55	277	404	41%	7
LAW CLERK OUTREACH	30,000	-	-	30,000	0%	12,500
TOTAL DIRECT EXPENSES:	51,031	227	1,889	49,142	4%	19,373
INDIRECT EXPENSES:						
SALARY EXPENSE (1.23 FTE)	111,508	9,392	46,798	64,710	42%	(336)
BENEFITS EXPENSE	37,621	3,051	14,875	22,746	40%	800
OTHER INDIRECT EXPENSE	29,532	2,554	12,979	16,553	44%	(674)
TOTAL INDIRECT EXPENSES:	178,661	14,996	74,652	104,009	42%	(210)
TOTAL ALL EXPENSES:	229,692	15,224	76,542	153,150	33%	19,163
NET INCOME (LOSS):	(22,492)	20,736	155,918	(178,410)	-693%	165,289

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LEGISLATIVE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	2,500	93	336	2,164	13%	705
STAFF MEMBERSHIP DUES	200	-	-	200	0%	83
JUD RECOMMEND COMMITTEE	2,250	-	-	2,250	0%	938
SUBSCRIPTIONS	2,000	-	1,986	14	99%	(1,153)
TELEPHONE	575	48	240	335	42%	(1)
CONTRACT LOBBYIST	15,000	3,000	6,000	9,000	40%	250
LEGISLATIVE REVIEW COMMITTEE	1,250	-	130	1,120	10%	391
BOG LEGISLATIVE COMMITTEE	300	-	-	300	0%	125
STAFF CONFERENCE & TRAINING	2,200	-	2,101	99	95%	(1,184)
TOTAL DIRECT EXPENSES:	26,275	3,141	10,793	15,482	41%	154
INDIRECT EXPENSES:						
SALARY EXPENSE (1.70 FTE)	160,438	13,276	67,200	93,237	42%	(351)
BENEFITS EXPENSE	53,043	4,307	21,385	31,658	40%	716
OTHER INDIRECT EXPENSE	40,817	3,539	17,983	22,834	44%	(976)
TOTAL INDIRECT EXPENSES:	254,298	21,122	106,569	147,729	42%	(611)
TOTAL ALL EXPENSES:	280,573	24,263	117,362	163,210	42%	(457)
NET INCOME (LOSS):	(280,573)	(24,263)	(117,362)	(163,210)	42%	(457)

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LICENSING & MEMBERSHIP RECORDS						
REVENUE:						
STATUS CERTIFICATE FEES	27,000	2,875	14,000	13,000	52%	2,750
INVESTIGATION FEES	20,000	1,600	12,900	7,100	65%	4,567
PRO HAC VICE **	400,000	34,828	170,451	229,549	43%	3,784
MEMBER CONTACT INFORMATION	3,000	200	3,173	(173)	106%	1,923
PHOTO BAR CARD SALES	200	48	252	(52)	126%	169
TOTAL REVENUE:	450,200	39,551	200,776	249,424	45%	13,193
DIRECT EXPENSES:						
POSTAGE	17,652	-	89	17,563	1%	7,266
SOFTWARE HOSTING	18,380	1,472	7,412	10,968	40%	246
TOTAL DIRECT EXPENSES:	36,032	1,472	7,501	28,531	21%	7,512
INDIRECT EXPENSES:						
SALARY EXPENSE (4.83 FTE)	515,705	43,887	213,507	302,198	41%	1,370
BENEFITS EXPENSE	158,553	13,009	63,709	94,844	40%	2,355
OTHER INDIRECT EXPENSE	115,968	10,062	51,135	64,833	44%	(2,815)
TOTAL INDIRECT EXPENSES:	790,226	66,958	328,352	461,875	42%	909
TOTAL ALL EXPENSES:	826,258	68,430	335,853	490,406	41%	8,422
NET INCOME (LOSS):	(376,058)	(28,879)	(135,076)	(240,982)	36%	21,615

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LIMITED LICENSE LEGAL TECHNICIAN PROGRAM						
REVENUE:						
SEMINAR REGISTRATIONS	7,000	-	5,600	1,400	80%	2,683
LLLT LICENSE FEES	17,731	1,507	6,511	11,220	37%	(877)
LLLT LATE LICENSE FEES	-	206	206	(206)		206
MCLE LATE FEES	300	-	-	300	0%	(125)
TOTAL REVENUE:	25,031	1,713	12,317	12,714	49%	1,887
DIRECT EXPENSES:						
LLLT BOARD	11,500	-	368	11,132	3%	4,424
LLLT EDUCATION	1,000	-	35	965	4%	382
TOTAL DIRECT EXPENSES:	12,500	-	403	12,097	3%	4,806
INDIRECT EXPENSES:						
SALARY EXPENSE (0.66 FTE)	66,030	5,616	25,797	40,232	39%	1,715
BENEFITS EXPENSE	21,211	1,690	7,923	13,289	37%	915
OTHER INDIRECT EXPENSE	15,847	1,385	7,037	8,810	44%	(434)
TOTAL INDIRECT EXPENSES:	103,088	8,690	40,757	62,331	40%	2,196
TOTAL ALL EXPENSES:	115,588	8,690	41,160	74,428	36%	7,002
NET INCOME (LOSS):	(90,557)	(6,978)	(28,843)	(61,714)	32%	8,889

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LIMITED PRACTICE OFFICERS						
REVENUE:						
INVESTIGATION FEES	300	-	300	-	100%	175
MCLE LATE FEES	4,000	-	1,650	2,350	41%	(17)
LPO EXAMINATION FEES	23,000	1,900	10,300	12,700	45%	717
LPO LICENSE FEES	160,000	13,400	63,892	96,108	40%	(2,774)
LPO LATE LICENSE FEES	2,000	2,340	2,340	(340)	117%	1,507
TOTAL REVENUE:	189,300	17,640	78,482	110,818	41%	(393)
DIRECT EXPENSES:						
FACILITY, PARKING, FOOD	9,500	1,972	1,972	7,528	21%	1,986
EXAM WRITING	19,000	-	4,200	14,800	22%	3,717
LPO BOARD	4,000	-	-	4,000	0%	1,667
LPO OUTREACH	1,000	-	-	1,000	0%	417
PRINTING & COPYING	200	34	34	166	17%	49
SUPPLIES	200	-	-	200	0%	83
SOFTWARE HOSTING	3,404	273	1,373	2,031	40%	45
TOTAL DIRECT EXPENSES:	37,304	2,279	7,580	29,724	20%	7,963
INDIRECT EXPENSES:						
SALARY EXPENSE (0.70 FTE)	67,660	5,758	27,181	40,479	40%	1,010
BENEFITS EXPENSE	22,097	1,745	8,219	13,878	37%	988
OTHER INDIRECT EXPENSE	16,807	1,446	7,350	9,457	44%	(347)
TOTAL INDIRECT EXPENSES:	106,563	8,949	42,750	63,813	40%	1,651
TOTAL ALL EXPENSES:	143,867	11,228	50,330	93,538	35%	9,615
NET INCOME (LOSS):	45,433	6,412	28,152	17,280	62%	9,222

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MANDATORY CONTINUING LEGAL EDUCATION						
REVENUE:						
ACTIVITY APPLICATION FEE	600,000	67,200	303,800	296,200	51%	53,800
ACTIVITY APPLICATION LATE FEE	220,000	23,250	124,450	95,550	57%	32,783
MCLE LATE FEES	225,000	114,900	181,500	43,500	81%	87,750
ANNUAL ACCREDITED SPONSOR FEES	39,000	15,000	39,000	-	100%	22,750
ATTENDANCE LATE FEES	120,000	4,950	49,400	70,600	41%	(600)
COMITY CERTIFICATES	29,800	3,275	27,300	2,500	92%	14,883
TOTAL REVENUE:	1,233,800	228,575	725,450	508,350	59%	211,367
DIRECT EXPENSES:						
DEPRECIATION	142,183	12,012	60,060	82,123	42%	(817)
STAFF MEMBERSHIP DUES	500	-	500	-	100%	(292)
MCLE BOARD	4,000	-	992	3,008	25%	675
STAFF TRAVEL/PARKING	50	-	-	50	0%	21
STAFF CONFERENCE & TRAINING	4,600	-	-	4,600	0%	1,917
TOTAL DIRECT EXPENSES:	151,333	12,012	61,552	89,781	41%	1,503
INDIRECT EXPENSES:						
SALARY EXPENSE (4.78 FTE)	402,008	37,185	184,189	217,819	46%	(16,686)
BENEFITS EXPENSE	136,972	11,386	56,134	80,838	41%	938
OTHER INDIRECT EXPENSE	114,768	9,969	50,666	64,101	44%	(2,846)
TOTAL INDIRECT EXPENSES:	653,747	58,540	290,989	362,758	45%	(18,594)
TOTAL ALL EXPENSES:	805,080	70,552	352,541	452,539	44%	(17,091)
NET INCOME (LOSS):	428,720	158,023	372,909	55,811	87%	194,276

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MEMBER SERVICES & ENGAGEMENT						
TEAM						
(LLB-MINI-MSE-NME)						
REVENUE:						
ROYALTIES	10,800	1,200	6,350	4,450	59%	1,850
NMP PRODUCT SALES	60,000	6,414	98,626	(38,626)	164%	73,626
DIGITAL VIDEO SALES	25,000	980	21,266	3,734	85%	10,849
SPONSORSHIPS	11,500	9,000	9,000	2,500	78%	4,208
SEMINAR REGISTRATIONS	16,000	7,161	10,725	5,275	67%	4,058
TRIAL ADVOCACY PROGRAM	15,000	-	-	15,000	0%	(6,250)
TOTAL REVENUE:	138,300	24,755	145,967	(7,667)	106%	88,342
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,500	46	82	3,418	2%	1,376
STAFF CONFERENCE & TRAINING	2,200	-	-	2,200	0%	917
SMALL TOWN AND RURAL COMMITTEE	7,500	-	-	7,500	0%	3,125
PRINTING & COPYING	1,600	1,442	1,442	158	90%	(775)
NEW LAWYER OUTREACH	1,000	-	-	1,000	0%	417
DISABILITY ACCOMMODATIONS	2,000	-	-	2,000	0%	833
HONORARIUM	1,500	-	-	1,500	0%	625
YLL SECTION PROGRAM	1,300	(35)	520	780	40%	22
SMALL TOWN AND RURAL COMMITTEE OUTREACH AND ACTIVITIES	65,000	-	-	65,000	0%	27,083
ON24 OVERAGE CHARGE	4,500	4,414	4,414	86	98%	(2,539)
MEMBER ENGAGEMENT COUNCIL	500	-	-	500	0%	208
WYLC CLE COMPS	1,000	-	-	1,000	0%	417
WYLC OUTREACH EVENTS	5,000	1,346	1,346	3,654	27%	737
SPEAKERS & PROGRAM DEVELOP	100	-	-	100	0%	42
WYL COMMITTEE	15,000	75	778	14,222	5%	5,472
TRIAL ADVOCACY EXPENSES	1,700	-	-	1,700	0%	708
LAW LIBRARY DESKBOOK ACCESS	10,000	-	9,311	689	93%	(5,144)
LAW SCHOOL OUTREACH	500	-	-	500	0%	208
RECEPTION/FORUM EXPENSE	1,000	100	200	800	20%	217
INSURANCE REBATE	(3,375)	-	-	(3,375)	0%	(1,406)
STAFF MEMBERSHIP DUES	450	-	-	450	0%	188
LENDING LIBRARY	4,000	49	136	3,864	3%	1,531
NMP SPEAKERS & PROGRAM DEVELOPMENT	250	-	-	250	0%	104
TOTAL DIRECT EXPENSES:	126,225	7,437	18,230	107,995	14%	34,364
INDIRECT EXPENSES:						
SALARY EXPENSE (4.64 FTE)	333,094	26,677	125,869	207,225	38%	12,920
BENEFITS EXPENSE	126,899	10,119	48,744	78,154	38%	4,130
OTHER INDIRECT EXPENSE	111,406	9,662	49,103	62,304	44%	(2,683)
INSURANCE REBATE	(19,016)	-	-	(19,016)	0%	(7,923)
TOTAL INDIRECT EXPENSES:	552,383	46,459	223,716	328,667	41%	6,444
TOTAL ALL EXPENSES:	678,608	53,896	241,945	436,662	36%	40,808
NET INCOME (LOSS):	(540,308)	(29,141)	(95,979)	(444,329)	18%	129,150

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
OFFICE OF THE EXECUTIVE DIRECTOR						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
LEADERSHIP TRAINING	20,000	-	-	20,000	0%	8,333
WASHINGTON LEADERSHIP INSTITUTE	100,000	-	100,000	-	100%	(58,333)
ED TRAVEL & OUTREACH	6,000	1,175	1,581	4,419	26%	919
STAFF TRAVEL/PARKING	2,000	198	913	1,087	46%	(80)
STAFF CONFERENCE & TRAINING	8,800	-	1,505	7,295	17%	2,162
STAFF MEMBERSHIP DUES	2,175	300	945	1,230	43%	(39)
TOTAL DIRECT EXPENSES:	138,975	1,673	104,944	34,031	76%	(47,038)
INDIRECT EXPENSES:						
SALARY EXPENSE (4.23 FTE) **	621,554	51,254	249,636	371,917	40%	9,344
BENEFITS EXPENSE **	161,527	14,998	67,200	94,327	42%	103
OTHER INDIRECT EXPENSE **	101,562	10,940	44,770	56,793	44%	(2,452)
TOTAL INDIRECT EXPENSES:	884,643	77,192	361,606	523,037	41%	6,995
TOTAL ALL EXPENSES:	1,023,618	78,865	466,550	557,068	46%	(40,043)
NET INCOME (LOSS):	(1,023,618)	(78,865)	(466,550)	(557,068)	46%	(40,043)

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
OFFICE OF GENERAL COUNSEL						
REVENUE:						
RECORDS REQUEST FEES	-	-	270	(270)		270
TOTAL REVENUE:	-	-	270	(270)		270
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,500	-	-	3,500	0%	1,458
STAFF MEMBERSHIP DUES	2,090	-	1,625	465	78%	(754)
COURT RULES COMMITTEE	1,000	-	-	1,000	0%	417
CUSTODIANSHIPS	5,000	-	-	5,000	0%	2,083
WILLS	2,000	-	-	2,000	0%	833
LITIGATION EXPENSES	200	-	136	64	68%	(52)
DISABILITY ACCOMMODATIONS	6,000	-	-	6,000	0%	2,500
STAFF CONFERENCE & TRAINING	6,215	104	104	6,111	2%	2,485
TOTAL DIRECT EXPENSES:	26,005	104	1,865	24,140	7%	8,970
INDIRECT EXPENSES:						
SALARY EXPENSE (5.92 FTE) **	658,437	54,913	281,940	376,497	43%	(7,592)
BENEFITS EXPENSE	201,864	16,546	82,229	119,635	41%	1,881
OTHER INDIRECT EXPENSE	142,139	12,339	62,707	79,432	44%	(3,483)
TOTAL INDIRECT EXPENSES:	1,002,440	83,798	426,877	575,563	43%	(9,193)
TOTAL ALL EXPENSES:	1,028,445	83,903	428,742	599,703	42%	(223)
NET INCOME (LOSS):	(1,028,445)	(83,903)	(428,472)	(599,973)	42%	47

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSE:						
STAFF MEMBERSHIP DUES	100	-	-	100	0%	42
DISCIPLINARY BOARD EXPENSES	5,000	-	-	5,000	0%	2,083
CHIEF HEARING OFFICER	40,000	3,333	16,665	23,335	42%	2
COURT REPORTERS	25,000	1,061	4,411	20,589	18%	6,005
HEARING OFFICER EXPENSES	4,000	-	18	3,982	0%	1,649
HEARING OFFICER TRAINING	1,000	-	-	1,000	0%	417
APPOINTED COUNSEL	50,400	4,200	21,000	29,400	42%	-
DISCIPLINARY SELECTION PANEL	1,000	-	-	1,000	0%	417
STAFF CONFERENCE & TRAINING	2,000	-	-	2,000	0%	833
TOTAL DIRECT EXPENSES:	128,500	8,594	42,094	86,406	33%	11,447
INDIRECT EXPENSES:						
SALARY EXPENSE (1.30 FTE)	125,704	10,447	54,417	71,288	43%	(2,040)
BENEFITS EXPENSE	41,128	3,347	16,895	24,233	41%	241
OTHER INDIRECT EXPENSE	31,213	2,708	13,761	17,452	44%	(756)
TOTAL INDIRECT EXPENSES:	198,045	16,501	85,073	112,972	43%	(2,554)
TOTAL ALL EXPENSES:	326,545	25,096	127,167	199,378	39%	8,893
NET INCOME (LOSS):	(326,545)	(25,096)	(127,167)	(199,378)	39%	8,893

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42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PRACTICE OF LAW BOARD						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
PRACTICE OF LAW BOARD	16,000	-	-	16,000	0%	6,667
TOTAL DIRECT EXPENSES:	16,000	-	-	16,000	0%	6,667
INDIRECT EXPENSES:						
SALARY EXPENSE (0.55 FTE)	47,386	3,923	19,861	27,525	42%	(117)
BENEFITS EXPENSE	16,398	1,322	6,587	9,810	40%	245
OTHER INDIRECT EXPENSE	13,205	1,139	5,786	7,419	44%	(284)
TOTAL INDIRECT EXPENSES:	76,989	6,384	32,234	44,755	42%	(155)
TOTAL ALL EXPENSES:	92,989	6,384	32,234	60,755	35%	6,511
NET INCOME (LOSS):	(92,989)	(6,384)	(32,234)	(60,755)	35%	6,511

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PUBLIC SERVICE PROGRAMS						
REVENUE:						
DONATIONS & GRANTS	132,400	39,916	39,916	92,484	30%	(15,251)
TOTAL REVENUE:	132,400	39,916	39,916	92,484	30%	(15,251)
DIRECT EXPENSES:						
DONATIONS/SPONSORSHIPS/GRANTS	300,000	24,000	102,441	197,559	34%	22,559
STAFF TRAVEL/PARKING	2,000	-	54	1,946	3%	779
PRO BONO & PUBLIC SERVICE COMMITTEE	2,500	-	-	2,500	0%	1,042
STAFF CONFERENCE & TRAINING	2,200	-	-	2,200	0%	917
PRO BONO OUTREACH	4,000	501	669	3,331	17%	997
TOTAL DIRECT EXPENSES:	310,700	24,501	103,164	207,536	33%	26,294
INDIRECT EXPENSES:						
SALARY EXPENSE (1.62 FTE)	136,915	11,125	56,310	80,605	41%	738
BENEFITS EXPENSE	47,862	3,855	19,094	28,769	40%	849
OTHER INDIRECT EXPENSE	38,896	3,385	17,201	21,695	44%	(995)
TOTAL INDIRECT EXPENSES:	223,674	18,365	92,605	131,068	41%	592
TOTAL ALL EXPENSES:	534,374	42,865	195,770	338,604	37%	26,886
NET INCOME (LOSS):	(401,974)	(2,950)	(155,854)	(246,120)	39%	11,635

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PUBLICATION & DESIGN SERVICES						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
SUBSCRIPTIONS	200	8	88	112	44%	(5)
IMAGE LIBRARY	4,800	-	4,756	44	99%	(2,756)
TOTAL DIRECT EXPENSES:	5,000	8	4,844	156	97%	(2,761)
INDIRECT EXPENSES:						
SALARY EXPENSE (0.89 FTE)	76,345	6,729	33,743	42,602	44%	(1,932)
BENEFITS EXPENSE	26,506	2,213	10,931	15,576	41%	114
OTHER INDIRECT EXPENSE	21,369	1,846	9,383	11,986	44%	(479)
TOTAL INDIRECT EXPENSES:	124,220	10,788	54,056	70,164	44%	(2,298)
TOTAL ALL EXPENSES:	129,220	10,797	58,900	70,319	46%	(5,059)
NET INCOME (LOSS):	(129,220)	(10,797)	(58,900)	(70,319)	46%	(5,059)

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42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REGULATORY SERVICES FTE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	490	-	490	-	100%	(286)
STAFF CONFERENCE & TRAINING	8,400	-	600	7,800	7%	2,900
STAFF TRAVEL/PARKING	600	-	126	474	21%	124
TOTAL DIRECT EXPENSES:	9,490	-	1,216	8,274	13%	3,024
INDIRECT EXPENSES:						
SALARY EXPENSE (2.25 FTE)	300,943	25,107	125,473	175,471	42%	(80)
BENEFITS EXPENSE	84,916	7,001	34,403	50,512	41%	978
OTHER INDIRECT EXPENSE	54,022	4,708	23,926	30,097	44%	(1,416)
TOTAL INDIRECT EXPENSES:	439,881	36,816	183,802	256,079	42%	(518)
TOTAL ALL EXPENSES:	449,371	36,816	185,018	264,353	41%	2,506
NET INCOME (LOSS):	(449,371)	(36,816)	(185,018)	(264,353)	41%	2,220

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REGULATORY REFORM						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	42,500	218	3,184	39,316	7%	14,524
TOTAL DIRECT EXPENSES:	42,500	218	3,184	39,316	7%	-
INDIRECT EXPENSES:						
SALARY EXPENSE (0.75 FTE)	109,615	9,137	45,967	63,648	42%	(294)
BENEFITS EXPENSE	29,839	2,473	12,244	17,596	41%	189
OTHER INDIRECT EXPENSE	18,007	1,569	7,975	10,032	44%	(472)
TOTAL INDIRECT EXPENSES:	157,462	13,180	66,186	91,276	42%	(577)
TOTAL ALL EXPENSES:	199,962	13,398	69,370	130,592	35%	(577)
NET INCOME (LOSS):	(199,962)	(13,398)	(69,370)	(130,592)	35%	13,947

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42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SERVICE CENTER						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	2,376	198	913	1,463	38%	77
STAFF CONFERENCE & TRAINING	677	-	-	677	0%	282
TOTAL DIRECT EXPENSES:	3,053	198	913	2,140	30%	359
INDIRECT EXPENSES:						
SALARY EXPENSE (5.78 FTE)	427,125	36,664	177,158	249,967	41%	811
BENEFITS EXPENSE	160,271	13,205	63,860	96,411	40%	2,920
OTHER INDIRECT EXPENSE	138,778	12,093	61,456	77,321	44%	(3,632)
TOTAL INDIRECT EXPENSES:	726,174	61,962	302,474	423,699	42%	98
TOTAL ALL EXPENSES:	729,227	62,160	303,387	425,839	42%	457
NET INCOME (LOSS):	(729,227)	(62,160)	(303,387)	(425,839)	42%	457

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SECTIONS ADMINISTRATION						
REVENUE:						
REIMBURSEMENTS FROM SECTIONS	275,000	30,018	353,856	(78,856)	129%	239,273
TOTAL REVENUE:	275,000	30,018	353,856	(78,856)	129%	239,273
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	1,500	35	35	1,465	2%	590
SECTION/COMMITTEE CHAIR MTGS	700	-	-	700	0%	292
STAFF MEMBERSHIP DUES	200	-	-	200	0%	83
TOTAL DIRECT EXPENSES:	2,400	35	35	2,365	1%	965
INDIRECT EXPENSES:						
SALARY EXPENSE (2.53 FTE)	169,092	13,833	66,219	102,873	39%	4,236
BENEFITS EXPENSE	67,073	5,432	26,271	40,802	39%	1,676
OTHER INDIRECT EXPENSE	60,745	5,323	27,053	33,692	45%	(1,743)
TOTAL INDIRECT EXPENSES:	296,910	24,588	119,543	177,366	40%	4,169
TOTAL ALL EXPENSES:	299,310	24,623	119,578	179,731	40%	5,134
NET INCOME (LOSS):	(24,310)	5,395	234,278	(258,588)	-964%	244,407

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SECTIONS OPERATIONS						
REVENUE:						
SECTION DUES	438,280	47,393	554,174	(115,894)	126%	371,557
SEMINAR PROFIT SHARE	159,700	-	-	159,700	0%	(66,542)
INTEREST INCOME	2,050	-	-	2,050	0%	(854)
PUBLICATIONS REVENUE	1,250	1,865	1,865	(615)	149%	1,344
OTHER	44,203	-	13,325	30,878	30%	(5,093)
TOTAL REVENUE:	645,483	49,258	569,364	76,119	88%	300,413
DIRECT EXPENSES:						
DIRECT EXPENSES OF SECTION ACTIVITIES	759,773	30,763	139,221	620,552	18%	177,351
REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES	280,433	30,018	353,856	(73,424)	126%	(237,009)
TOTAL DIRECT EXPENSES:	1,040,206	60,782	493,077	547,129	47%	(59,658)
NET INCOME (LOSS):	(394,722)	(11,523)	76,287	(471,009)	-19%	240,754

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
TECHNOLOGY						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	115,000	11,074	67,005	47,995	58%	(19,088)
STAFF TRAVEL/PARKING	1,000	-	90	910	9%	327
STAFF MEMBERSHIP DUES	300	-	-	300	0%	125
TELEPHONE	90,000	6,940	36,321	53,679	40%	1,179
COMPUTER HARDWARE	66,200	2,884	30,213	35,987	46%	(2,630)
COMPUTER SOFTWARE	530,000	12,084	246,109	283,891	46%	(25,275)
HARDWARE SERVICE & WARRANTIES	50,000	-	21,699	28,301	43%	(865)
SOFTWARE MAINTENANCE & LICENSING	380,000	44,725	159,414	220,586	42%	(1,081)
THIRD PARTY SERVICES	65,000	306	47,595	17,405	73%	(20,512)
CLOUD INFRASTRUCTURE	130,000	-	13,494	116,506	10%	40,673
STAFF CONFERENCE & TRAINING	6,000	-	-	6,000	0%	2,500
TRANSFER TO INDIRECT EXPENSES	(1,433,500)	(78,012)	(621,940)	(811,560)	43%	24,649
TOTAL DIRECT EXPENSES:	-	-	-	-		(0)
INDIRECT EXPENSES:						
SALARY EXPENSE (12.00 FTE) **	1,414,575	113,082	587,467	827,108	42%	1,939
BENEFITS EXPENSE **	420,473	31,618	157,964	262,508	38%	17,233
CAPITAL LABOR & OVERHEAD	(75,000)	(15,257)	(49,699)	(25,301)	66%	(18,449)
OTHER INDIRECT EXPENSE	288,120	25,077	127,448	160,672	44%	(7,398)
TOTAL INDIRECT EXPENSES:	2,048,168	154,521	823,180	1,224,987	40%	(6,675)
TOTAL ALL EXPENSES:	2,048,168	154,521	823,180	1,224,987	40%	(6,675)
NET INCOME (LOSS):	(2,048,168)	(154,521)	(823,180)	(1,224,987)	40%	30,223

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
VOLUNTEER ENGAGEMENT						
REVENUE:						
TOTAL REVENUE:	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>		<u>-</u>
DIRECT EXPENSES:						
POSTAGE	600	-	468	132	78%	(218)
STAFF MEMBERSHIP DUES	450	90	300	150	67%	(113)
STAFF CONFERENCE & TRAINING	5,200	-	-	5,200	0%	2,167
SUBSCRIPTIONS	816	-	358	458	44%	(18)
REGULATORY SCHOOL	45,000	-	5,102	39,898	11%	13,648
ABA DELEGATES	16,000	1,941	1,941	14,059	12%	4,725
TOTAL DIRECT EXPENSES:	<u>68,066</u>	<u>2,031</u>	<u>8,170</u>	<u>59,896</u>	<u>12%</u>	<u>20,191</u>
INDIRECT EXPENSES:						
SALARY EXPENSE (1.70 FTE)	150,680	12,054	50,616	100,063	34%	12,167
BENEFITS EXPENSE	51,454	4,137	18,694	32,761	36%	2,746
OTHER INDIRECT EXPENSE	40,817	3,569	18,140	22,677	44%	(1,133)
TOTAL INDIRECT EXPENSES:	<u>242,951</u>	<u>19,760</u>	<u>87,449</u>	<u>155,502</u>	<u>36%</u>	<u>13,780</u>
TOTAL ALL EXPENSES:	<u>311,017</u>	<u>21,792</u>	<u>95,619</u>	<u>215,398</u>	<u>31%</u>	<u>13,780</u>
NET INCOME (LOSS):	<u>(311,017)</u>	<u>(21,792)</u>	<u>(95,619)</u>	<u>(215,398)</u>	<u>31%</u>	<u>33,971</u>

Washington State Bar Association
Statement of Activities
For the Period from February 1, 2025 to February 28, 2025
42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
INDIRECT EXPENSES:						
SALARIES	14,691,362	1,177,011	5,939,408	8,751,954	40%	181,993
TEMPORARY SALARIES	238,085	49,722	243,003	(4,918)	102%	(143,801)
CAPITAL LABOR & OVERHEAD	(75,000)	(15,257)	(49,699)	(25,301)	66%	18,449
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(83,333)
INSURANCE REBATE	(19,016)	-	-	(19,016)	0%	(7,923)
EMPLOYEE ASSISTANCE PLAN	4,800	1,200	2,400	2,400	50%	(400)
EMPLOYEE SERVICE AWARDS	2,610	260	1,130	1,480	43%	(43)
FICA (EMPLOYER PORTION)	1,110,604	90,953	441,347	669,257	40%	21,405
L&I INSURANCE	72,277	-	14,945	57,333	21%	15,171
WA STATE FAMILY MEDICAL LEAVE (EMPLOYE	33,182	3,179	13,578	19,604	41%	248
MEDICAL (EMPLOYER PORTION)	2,057,482	172,377	840,002	1,217,480	41%	17,282
RETIREMENT (EMPLOYER PORTION)	1,322,122	106,231	526,655	795,467	40%	24,229
TRANSPORTATION ALLOWANCE	34,000	330	23,235	10,765	68%	(9,068)
UNEMPLOYMENT INSURANCE	71,794	8,132	24,501	47,293	34%	5,413
TOTAL SALARY & BENEFITS EXPENSE:	19,344,303	1,594,138	8,020,506	11,323,797	41%	39,620
WORKPLACE BENEFITS	56,400	962	6,547	49,853	12%	16,953
HUMAN RESOURCES POOLED EXP	111,300	5,645	29,219	82,081	26%	17,156
MEETING SUPPORT EXPENSES	9,950	1,193	3,867	6,083	39%	279
RENT	900,000	156,533	459,362	440,638	51%	(84,362)
MOVE / DOWNSIZE EXPENSES	-	1,415	23,019	(23,019)		(23,019)
PERSONAL PROP TAXES-WSBA	8,400	1,237	2,860	5,540	34%	640
FURNITURE, MAINT, LH IMP	75,617	(2,180)	34,819	40,798	46%	(3,312)
OFFICE SUPPLIES & EQUIPMENT	22,164	2,058	8,385	13,779	38%	850
FURN & OFFICE EQUIP DEPRECIATION	112,375	9,616	47,440	64,935	42%	(617)
COMPUTER HARDWARE DEPRECIATION **	42,000	3,388	15,881	26,119	38%	1,619
COMPUTER SOFTWARE DEPRECIATION	18,067	3,717	21,372	(3,305)	118%	(13,844)
INSURANCE	288,200	21,710	108,550	179,650	38%	11,533
WORK HOME FURNITURE & EQUIP	14,000	-	1,030	12,970	7%	4,803
PROFESSIONAL FEES-AUDIT	41,000	-	36,577	4,423	89%	(19,493)
PROFESSIONAL FEES-LEGAL	200,000	6,432	44,913	155,087	22%	38,420
ONLINE LEGAL RESEARCH	77,900	6,305	39,421	38,479	51%	(6,963)
ACCOMODATIONS FUND	6,500	-	-	6,500	0%	2,708
TRANSLATION SERVICES	12,000	288	2,548	9,452	21%	2,452
TELEPHONE & INTERNET	33,600	2,740	13,560	20,040	40%	440
POSTAGE - GENERAL	15,500	289	2,457	13,043	16%	4,001
RECORDS STORAGE	10,000	5,175	18,850	(8,850)	189%	(14,684)
BANK FEES	40,000	3,199	16,865	23,135	42%	(198)
PRODUCTION MAINTENANCE & SUPPLIES	13,000	(34)	4,290	8,710	33%	1,126
COMPUTER POOLED EXPENSES	1,433,500	78,012	621,940	811,560	43%	(24,649)
TOTAL OTHER INDIRECT EXPENSES:	3,541,473	307,699	1,563,775	1,977,698	44%	(88,161)
TOTAL INDIRECT EXPENSES:	22,885,776	1,901,837	9,584,280	13,301,495	42%	(48,540)

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association
Statement of Activities
For the Period from February 1, 2025 to February 28, 2025
42% OF YEAR COMPLETE

SUMMARY PAGE	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE
ACCESS TO JUSTICE	(390,330)	(33,349)	(170,472)	(219,858)
ADMISSIONS/BAR EXAM	93,849	80,608	301,582	(207,734)
ADVANCEMENT FTE	(389,588)	(31,671)	(158,723)	(230,865)
BAR NEWS	(124,336)	(4,138)	(65,190)	(59,146)
BOARD OF GOVERNORS	(582,745)	(31,128)	(174,403)	(408,342)
CLE - PRODUCTS	699,820	9,686	446,939	252,881
CLE - SEMINARS	(433,917)	(42,625)	(190,231)	(243,686)
CLIENT PROTECTION FUND	241,176	87,848	876,969	(635,794)
CHARACTER & FITNESS BOARD	(173,905)	(11,730)	(65,281)	(108,624)
COMMUNICATIONS	(890,013)	(53,462)	(274,648)	(615,365)
COMMUNICATIONS FTE	(249,012)	(24,515)	(108,879)	(140,133)
DESKBOOKS	(200,902)	(2,694)	(122,064)	(78,838)
DISCIPLINE	(6,402,254)	(517,969)	(2,600,055)	(3,802,199)
DIVERSITY	(307,805)	8,726	(117,872)	(189,933)
FINANCE	(559,713)	(33,332)	(214,638)	(345,075)
FOUNDATION	(183,526)	(13,950)	(73,666)	(109,860)
HUMAN RESOURCES	(574,952)	(67,307)	(344,709)	(230,243)
LAW CLERK PROGRAM	(22,492)	20,736	155,918	(178,410)
LEGISLATIVE	(280,573)	(24,263)	(117,362)	(163,210)
LEGAL LUNCHBOX	(4,917)	1,192	3,667	(8,584)
LICENSE FEES	17,492,616	1,851,539	7,195,708	10,296,908
LICENSING AND MEMBERSHIP	(376,058)	(28,879)	(135,076)	(240,982)
LIMITED LICENSE LEGAL TECHNICIAN	(90,557)	(6,978)	(28,843)	(61,714)
LIMITED PRACTICE OFFICERS	45,433	6,412	28,152	17,280
MANDATORY CLE ADMINISTRATION	428,720	158,023	372,909	55,811
MEMBER WELLNESS PROGRAM	(229,651)	(19,206)	(95,639)	(134,012)
MINI CLE	(119,503)	(9,906)	(49,922)	(69,582)
MEMBER SERVICES & ENGAGEMENT	(395,069)	(25,205)	(114,191)	(280,878)
NEW MEMBER EDUCATION	(20,818)	4,778	64,467	(85,286)
OFFICE OF GENERAL COUNSEL	(1,028,445)	(83,903)	(428,472)	(599,973)
OFFICE OF THE EXECUTIVE DIRECTOR	(1,023,618)	(78,865)	(466,550)	(557,068)
OGC-DISCIPLINARY BOARD	(326,545)	(25,096)	(127,167)	(199,378)
PRACTICE OF LAW BOARD	(92,989)	(6,384)	(32,234)	(60,755)
PRACTICE MANAGEMENT ASSISTANCE	(173,653)	4,530	(114,123)	(59,529)
PROFESSIONAL RESPONSIBILITY PROGRAM	(215,119)	(17,344)	(88,788)	(126,331)
PUBLIC SERVICE PROGRAMS	(401,974)	(2,950)	(155,854)	(246,120)
PUBLICATION & DESIGN SERVICES	(129,220)	(10,797)	(58,900)	(70,319)
REGULATORY SERVICES FTE	(449,371)	(36,816)	(185,018)	(264,353)
REGULATORY REFORM	(199,962)	(13,398)	(69,370)	(130,592)
SECTIONS ADMINISTRATION	(24,310)	5,395	234,278	(258,588)
SECTIONS OPERATIONS	(394,722)	(11,523)	76,287	(471,009)
SERVICE CENTER	(729,227)	(62,160)	(303,387)	(425,839)
TECHNOLOGY	(2,048,168)	(154,521)	(823,180)	(1,224,987)
VOLUNTEER EDUCATION	(311,017)	(21,792)	(95,619)	(215,398)
INDIRECT EXPENSES	22,885,776	1,901,837	9,584,280	13,301,495
TOTAL OF ALL	(21,336,416)	(2,633,456)	(11,170,630)	(10,165,785)
NET INCOME (LOSS)	(1,549,360)	731,620	1,586,350	(3,135,710)

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.]

2024-2025 WSBA BOARD OF GOVERNORS MEETING SCHEDULE

MEETING DATE	LOCATION	DESCRIPTION	EXECUTIVE COMMITTEE MEETING	MATERIALS DEADLINE
October 18-19, 2024	Semiahmoo Resort Blaine, WA	Team Building Retreat		n/a
November 7-8, 2024	WSBA Conference Center Seattle, WA	BOG Meeting	October 16, 2024	October 8, 2024
January 17-18, 2025	WSBA Conference Center Seattle, WA	BOG Meeting KCBA MLK Luncheon Jan. 17	December 18, 2024	December 10, 2024
March 21-22, 2025	Great Wolf Lodge Conference Center Grand Mound, WA	BOG Meeting	February 26, 2025	February 18, 2025
May 2-3, 2025	Red Lion Hotel Port Angeles Harbor Port Angeles, WA	BOG Meeting	April 16, 2025	April 8, 2025
July 17 - 18, 2025 July 19, 2025	The Marcus Whitman Hotel and Conference Center Walla Walla, WA	BOG Meeting BOG Planning Retreat	June 25, 2025	June 17, 2025
September 26-27, 2025	WSBA Offices Seattle, WA	BOG Meeting	September 3, 2025	August 26, 2025

All proposed agenda items and materials must be submitted by the deadline stated above. Materials can be submitted through 1) a staff liaison, 2) staff supervisor or department director, 3) staff member identified by the Office of the Executive Director or, if none of those are applicable, 4) directly to the Executive Director (terran@wsba.org). Submitters will be notified of the status of their request after the materials deadline. All meeting materials will be published appx. two weeks prior to the meeting.

Materials should include: 1) a cover memo, 2) additional/supplemental materials, 3) be inclusive of all WSBA analyses, if relevant and, 4) be in final form suitable for publication. Click [here](#) for more information.

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 ¹	Yes	Majority
2. Adjourn	Closes the meeting	No	Yes	No	No	Majority
3. Recess	Establishes a brief break	No	Yes	No ²	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 ³
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 ⁴	No	Majority
12. Amend a motion or resolution (primary amendment)	Proposes a change to a main motion	No	Yes	Yes ⁴	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



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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BOARD OF GOVERNORS

Anthony David Gipe
President

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e-mail: 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



BOARD OF GOVERNORS

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