WASHINGTON STATE
BAR ASSOCIATION

## BOARD OF GOVERNORS MEETING

**July 24-25, 2026**

# Meeting Materials

Tulalip Resort Casino, Tulalip WA
Zoom and Teleconference

**Board of Governors Meeting**
**Tulalip Resort, Tulalip, WA**
**July 24-25, 2026**

***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, July 24th : Meeting ID: 862 7410 7638 Passcode: 704385**
https://wsba.zoom.us/j/86274107638?pwd=xPIWiQCEdbcdq8BAQGarNI7Plb6WNR.1

**Saturday, July 25th : Meeting ID: 856 5489 1874 Passcode: 008684**
https://wsba.zoom.us/j/85654891874?pwd=P8D5rYsuyDLz2xbOwdSrSaaqR70JP5.1

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

**FRIDAY, JULY 24, 2026**

**9:00 AM – CALL TO ORDER & WELCOME**

☐ **WELCOME & CALL TO ORDER**

**MEMBER & PUBLIC COMMENT**

☐ **MEMBER AND PUBLIC COMMENTS**

**CONSENT CALENDAR**

☐ **CONSENT CALENDAR**

The purpose of the consent calendar is to efficiently act on items that appear to be non-controversial and will not require discussion. Input on these topics is welcome and can accomplished by (1) sending an email to boardfeedback@wsba.org, (2) contacting a member of the Board, or (3) contacting the Executive Director. Any governor may request that any 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 blonc*.


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☐ **GOVERNOR ROUNDTABLE**

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WASHINGTON STATE
BAR ASSOCIATION

# BOARD OF GOVERNORS MEETING MINUTES

## Wenatchee, WA

## May 1-2, 2026

Call to Order and Welcome

The meeting of the Board of Governors of the Washington State Bar Association (WSBA) was called to order by Immediate Past President Sunitha Anjilvel at 9:02 a.m. on Friday, May 1, 2026. Governors in attendance were:

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

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

Also in attendance were Alec Stephens, Alex Reaganson, Alexander Wisby, Betsylew Miale-Gix, Brian McMahon, Bobby Henry, Catherine Biestek, Catherine Schur, Dan Crystal, Darcel Labo, Andrew Yi, David Ward, George Fearing, Justin Bingham, Kyle Sciuchetti, Nancy Hawkins, Nicole Gustine, Norma Linda Ureña, Julianne Unite, Min Kang, Paris Eriksen, Patrick Malone, Peter Arkison, Rajeev Majumdar, Sophie Ying, and Timothy Allen.

DRAFT

Immediate Past President Anjilvel commended the legal community's role in fostering public understanding of and trust in the legal system noting President Adewale's concurrent participation in a Law Day event in Olympia. A short film was premiered showcasing the positive impact of the WSBA's Lawyers in the Classroom program. Board members were encouraged to serve as community ambassadors by participating in the pledge drive to have lawyers in classrooms on Constitution Day.

Member and Public Comments

Immediate Past President Anjilvel opened the floor for member and public comments. Alex Reaganson, Chair of the Washington New Members Committee, addressed the Board on behalf of the committee and individually. Mr. Reaganson expressed support for Governor Couch's proposal to remove ABA accreditation requirements for the bar exam, citing the potential to increase diversity in the legal profession and to generate additional licensing fee revenue. He emphasized the importance of eliminating barriers for graduates of non-accredited schools, particularly those from low-income backgrounds.

Consent Calendar

Immediate Past President Anjilvel presented the consent calendar. There being no requests for removal or objections, the items on the consent calendar were adopted by unanimous consent. Governor Villeneuve expressed appreciation for the APEX Award process and encouraged increased member participation in future nominations.

Executive Director's Report

Executive Director Nevitt referred to her written report available in the meeting materials and invited questions. No questions were raised.

Proposed Amendments to APR 3(d), APR 4(d), and WSBA Bylaws Re Score Expiration and Bar Exam Requirement – First Read

Chief Regulatory Counsel Garcia presented proposed amendments to Admission and Practice Rules 3(d) and 4(d), along with corresponding amendments to the WSBA Bylaws, addressing score expiration timelines and bar exam requirements. The proposal was presented for initial Board review. The Board discussed the proposal, and the matter will return to the Board for further consideration.

Proposed Amendments to APR 3(b)(3) Re Common Law Jurisdictions for Bar Exam – First Read

Chief Regulatory Counsel Garcia introduced the first reading of proposed amendments to APR 3(b)(3), which govern qualifications for lawyers from common law jurisdictions to sit for the Washington bar exam. The proposed amendments seek to modernize language that currently references "jurisdictions where the common law of England is the basis of jurisprudence" and to align the active legal experience requirements for internationally trained lawyers with those applicable to U.S.-trained lawyers, who require one year of experience compared to three years currently required of foreign-trained lawyers. Governors expressed support for the changes and suggested further language revisions to encompass lawyers from civil law jurisdictions. Chief Garcia agreed to follow up with Governors and to gather feedback from the admissions team on practical implementation. The matter will return to the Board at a future meeting.

Proposed Amendments to APR 1(e) Re Definition of Active Legal Experience – First Read

Chief Regulatory Counsel Garcia presented proposed amendments to clarify the definition of "active legal experience" for purposes of admission by motion and reactivation of inactive licenses. The current definition was identified as vague and inconsistently applied. The proposal establishes a minimum standard of 1,000 qualifying hours over a 12-month period and explicitly excludes unauthorized practice of law and other specified activities. Concerns were raised that the proposed list of qualifying activities was overly restrictive, potentially excluding positions involving substantive legal work under lawyer supervision that do not formally require a law license. Chief Garcia acknowledged the complexity of establishing clear and enforceable standards and indicated that the feedback would be taken into account. Further review and consultation with the admissions team were proposed before the matter returns to the Board.

Proposed Changes to Admissions Policies Re Definition of Approved Law School

Chief Regulatory Counsel Garcia presented proposed changes to the definition of "approved law school" for admission to practice in Washington. The proposal would allow graduates of law schools recognized by other jurisdictions for state bar eligibility—in addition to ABA-accredited schools—to sit for the Washington bar exam. Discussion included opinions on the quality of education at non-ABA-accredited institutions and potential impacts on competency standards, as well as the access benefits for first-generation students, working adults, and applicants facing financial or geographic barriers. Supporters noted that graduates of non-accredited schools are already being licensed in Washington through existing pathways. Gov. Rathbone moved to approve the proposed changes to admissions policies re definition of approved law school as presented, with an effective date of September 1, 2026. The motion passed with one negative vote, with three members not present.

Proposed Changes to Admissions Policies Re LPO Exam and Repeat Late Filing Deadline for NextGen

Chief Regulatory Counsel Garcia presented two related action items. The first would amend the Limited Practice Officer (LPO) examination schedule by shifting exam dates from February and July to April and October, to better align with applicant schedules and reduce administrative costs. The second would add an additional application deadline for candidates who did not pass the immediately preceding Washington State bar examination, in response to anticipated delays in score delivery associated with the transition to the next-generation bar exam, to avoid penalizing applicants for circumstances outside their control. Gov. Petrasek moved to approve the proposed changes to admissions policies re LPO exam and repeat late filing deadline for NextGen as presented. The motion passed unanimously. Gov. Arneson and Gov. Villenueve were not present for the vote.

Proposed Changes to Committee and Board Policy Re Board of Bar Examiners

Chief Regulatory Counsel Garcia presented a proposal to amend WSBA policy to increase the maximum size of the Board of Bar Examiners from 50 to 75 members. The expansion is intended to ensure adequate capacity for grading and drafting ethics prompts as the WSBA transitions to the next-generation bar exam and the new portfolio evaluation pathway. All Board members continue to be selected through a competitive application process and mandatory training, with scheduling coordinated around preset grading conference dates. Additional costs would be offset by application fees beginning in fiscal year 2027. Gov. Bloom inquired about the necessity of a maximum size limit, which was addressed by emphasizing the importance of structured training and managed recruitment. Gov. Couch moved to approve the proposed changes to committee and

board policy regarding Board of Bar Examiners. The motion passed unanimously. Gov. Arneson and Gov. Villenueve were not present for the vote.

President-Elect Candidate Interview and Election

The Board conducted the election for the 2026–2027 WSBA President-Elect. Gov. Nguyen was the sole candidate for the position. Gov. Nguyen delivered an opening statement and responded to questions from the Board. Ballots were administered and counted by Executive Director Nevitt, General Counsel Powers, and Chief Disciplinary Counsel Ende via secret electronic ballot. Gov. Nguyen was elected as WSBA President-Elect for 2026–2027.

Governor Candidate Interviews and Elections

The Board conducted candidate interviews and elections for three open Board of Governors seats: District 8, District 7 North, and District 2 (mid-term vacancy). Each candidate was allotted 15 minutes for an opening statement and questions from the Board. Ballots were administered and counted by Executive Director Nevitt, General Counsel Powers, and Chief Disciplinary Counsel Ende, with voting conducted by secret electronic ballot. Candidates not being interviewed were excluded from the proceedings during each respective interview.

*District 8*

The candidates for the District 8 seat were Timothy Allen, Brian McMahon, Sophie Ying and Makan Shetabi. Aaron Richter had withdrawn from the race prior to the meeting; Makan Shetabi was not present for the interview. Sophie Ying was elected to represent District 8.

*District 7 North*

The candidates for the District 7 North seat were Alexander Wisby and Norma Linda Ureña. Norma Linda Ureña was elected to represent District 7 North.

*District 2 Mid-Term Vacancy*

The candidates for the District 2 mid-term vacancy were Kenneth Zirkman, Min Kang, and Peter Arkison. Kenneth Zirkman had withdrawn from the race prior to the meeting. Min Kang was elected to represent District 2 in the mid-term vacancy.

The Board expressed appreciation to all candidates who participated in the interview and election process.

Interim Report from the Oath Review and Drafting Task Force

Task Force Chair Majumdar and Chief Disciplinary Counsel Ende presented an interim report from the Oath Review and Drafting Task Force. The Task Force has been gathering historical documents and academic resources on the development of U.S. oaths of attorney. The task force includes a diverse group of judges, private practitioners, and non-lawyer practitioners, meets monthly, and has achieved high survey response rates from licensed legal professionals and specialty bar associations.

Gov. Villeneuve suggested that the revised oath reflect Washington State's unique legal and constitutional history and its relationship with tribal nations.

Special Meeting of the Washington State Bar Foundation: Approve Appointment of New Trustee

The Board convened a Special Meeting of the Washington State Bar Foundation. Foundation Board President Anderson presented a proposal to appoint Audrey Tran, a second-year law student, as the new law student trustee on the Washington State Bar Foundation Board of Trustees. The foundation has historically maintained a designated law student trustee position; Ms. Tran's term would run through her graduation. Gov. Petrasek moved to approve the appointment of Audrey Tran to the Washington State Bar Foundation Board of Trustees. The motion was passed unanimously. Mr. Anderson also noted that a public member trustee vacancy exists on the foundation board and that efforts to identify a qualified candidate are underway.

**RECESS**

There being no further business for the day, the meeting recessed at 4:00 p.m. on May 1, 2026.

**SATURDAY, MAY 2, 2026**

Call to Order

The Board of Governors reconvened on Saturday, May 2, 2026, at 9:03 a.m. at the Wenatchee Convention Center, with President Adewale presiding.

President's Report

President Adewale opened with a call to action for legal practitioners across Washington to participate in Constitution Day programs on September 17, 2026, encouraging Board members to lead by example as community ambassadors by being present in classrooms in their respective districts. President Adewale also noted the upcoming joint column with Executive Director Nevitt in Bar News and provided updates on ongoing Law Day activities.

Final Report from the Member Well-Being Task Force

Task Force Chair Bingham, joined by Task Force Members Labo and Sciuchetti, Member Wellness Program Manager Crystal, and Advancement Department Director Plachy, presented the Member Well-Being Task Force's final report following two years of work. The report addressed systemic well-being challenges across the legal profession and put forward actionable strategies to improve lawyer well-being.

Gov. Arneson moved to accept the Final Report from the Member Well-Being Task Force and to task relevant staff with implementing next steps, including bringing policy questions and updates back to the Board. The motion passed unanimously. Gov. Fay and Gov. Villenueve were not present for the vote.

Proposed Client Protection Fund Assessment for 2027 and 2028

Treas. Nguyen and Director of Finance Lynch presented the proposed Client Protection Fund Assessment for 2027 and 2028. The Client Protection Fund protects clients from financial loss resulting from dishonest conduct by lawyers and is supported by WSBA's active attorney, Limited License Legal Technician, House Counsel, Foreign Law Consultant, and pro hac vice members. The fund currently holds approximately $5 million. The Client Protection Board recommended a $5 assessment for both 2027 and 2028. The Budget and Audit Committee reviewed this recommendation and proposed a modification: no assessment for 2027 and

a $5 assessment for 2028, based on the current fund balance and the absence of any immediate threat to the fund's solvency. Gov. Petrasek moved to approve the Budget and Audit Committee's recommendation of a $0 assessment for 2027 and a $5 assessment for 2028. The motion passed unanimously. Gov. Fay and Gov. Villenueve were not present for the vote. The recommendation will be forwarded to the Supreme Court for final determination.

Proposed Changes to General Rule 9 (GR 9)

Court Rules and Procedures Committee Chair Yi and Administrative Office of the Courts staff attorney Ward presented proposed changes to GR 9, which governs Supreme Court rulemaking. The principal proposed change would move the deadline for submitting rule changes from October 15 to September 1, providing additional time for stakeholders, including the WSBA, to offer pre-publication comments to the Supreme Court.

Chair Yi proposed that the Board delegate limited authority to the Court Rules and Procedures Committee to conduct initial technical pre-screening of proposed rules prior to their publication for public comment. This screening would be confined to identifying typographical and grammatical errors and would not encompass substantive review or comment on behalf of the WSBA. Discussion ensued regarding the need for a formal charter to define the committee's authority and accountability when acting in this capacity. Gov. Arneson and Chair Yi agreed to work with staff liaison Gustine to develop appropriate guidelines, to be presented at the July meeting. Comments on the proposed GR 9 changes are due by June 1, 2026.

Governor At-Large Election

DEI Council Co-Chairs Gov. Larry and Alec Stephens presented the Council's report on the at-large governor election. The Council evaluated five candidates—following one withdrawal—using a structured rubric and recommended two finalists for placement on the member ballot. Executive Director Nevitt addressed the election timeline under the WSBA Bylaws and the appropriate process for managing any changes in candidate status prior to the election. Gov. Bhang moved to accept the DEI Council's recommendation to advance Tom Ahearne and Sophie Ying to the ballot for the at-large governor position. The motion passed unanimously, with one abstention.

Executive Session

The Board entered executive session at 11:07 a.m. to receive and discuss legal advice regarding litigation involving mandatory bar associations and the Keller deduction, as a follow-up to prior executive session discussions in November 2025 and March 2026, and to discuss the WSBA's future strategy with respect to the Keller deduction in 2027 and beyond. The session concluded at 11:56 a.m. and the Board returned to public session.

Governor Roundtable

Gov. Price requested an update on Department of Justice rulemaking. Chief Disciplinary Counsel Ende reported that the WSBA's public comment on the DOJ's rulemaking proposal had been timely submitted and

publicly posted, following a delay in posting evidently attributable to an exceptionally high volume of submissions received by the Department.

Gov. Dresden, co-chair of the Member Engagement Council, updated the Board on the section viability review process currently underway for three sections: the Legal Assistance and Military Personnel Section, the Liquor, Cannabis, and Psychedelic Section, and the Animal Law Section. Gov. Dresden noted that presentation of recommendations to the full Board has been delayed to September.

Gov. Bhang highlighted the upcoming National Mock Trial Competition in Des Moines, Iowa, and expressed support for Seattle's University Prep High School team competing at the national level.

Meeting Feedback: Rose, Thorns & Bud

Governors participated in a meeting feedback session using the Rose, Thorns & Bud format. Positive feedback was extended to the meeting hosts in Wenatchee and to President Adewale for his leadership in chairing the meeting. Areas for continued attention and future planning were noted, including coordination of the July retreat, which will be led by President-Elect Petrasek.

**ADJOURNMENT**

There being no further business, President Adewale adjourned the meeting at 12:02 p.m. on May 2, 2026.

Respectfully,

Terra Nevitt
WSBA Executive Director & Secretary

DRAFT

## Board of Governors Meeting – Motions List
## Olympia, WA
## May 1-2, 2026

- **Approve the Consent Calendar:** Adopted by unanimous consent.
- **Approve Proposed Changes to Admissions Policies Re Definition of Approved Law School (Effective September 1, 2026):** Passed with one negative vote; three members not present.
- **Approve Proposed Changes to Admissions Policies Re LPO Exam and Repeat Late Filing Deadline for NextGen:** Passed unanimously; three members not present.
- **Approve Proposed Changes to Committee and Board Policy Re Board of Bar Examiners:** Passed unanimously; three members not present.
- **Elect Nam Nguyen as WSBA President-Elect for 2026–2027:** Elected unanimously by secret ballot.
- **Elect Sophie Ying as District 8 Governor:** Elected by secret ballot following a runoff election.
- **Elect Norma Linda Ureña as District 7 North Governor:** Elected by secret ballot.
- **Elect Min Kang as District 2 Governor (Mid-Term Vacancy):** Elected by secret ballot.
- **Approve Appointment of Audrey Tran to the Washington State Bar Foundation Board of Trustees:** Passed unanimously.
- **Accept the Final Report from the Member Well-Being Task Force and Task Staff with Implementation of Recommendations:** Passed unanimously; three members not present.
- **Approve Client Protection Fund Assessment ($0 for 2027 and $5 for 2028):** Passed unanimously; three members not present.
- **Approve DEI Council Recommendation to Advance Tom Ahearne and Sophie Ying to the At-Large Governor Ballot:** Passed unanimously, with one abstention.

DRAFT

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Rajeev D. Majumdar, Chair, Oath Review and Drafting Task Force
Douglas Ende, Staff Liaison

**DATE:** June 17, 2026

**RE:** Proposed Extension to the Oath Review and Drafting Task Force Charter

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**ACTION**: Presented for adoption is an amendment to the Oath Review and Drafting Task Force Charter to extend the deadline from October 31, 2026 to May 1, 2027 for completion of work and submission of a final report to the Board of Governors.

**Background**

At the May 2026 meeting of the Board of Governors, Task Force Chair Rajeev D. Majumdar provided the Board with a status update on the progress of the WSBA Oath Review and Drafting Task Force. In short, the Task Force has largely completed the "Review" component of its work and—with the formation of two drafting-oriented subcommittees—has embarked upon the "Drafting" component. That work proceeds apace, and the Task Force will have reviewed a working draft of a revised oath at its June 2026 meeting.

The Task Force Charter was adopted by the Board on July 18, 2025. The Charter provides that the Task Force is to complete work and submit a final report not later than one year after the first Task Force meeting, unless the timeline for completion is extended by the Board. The first meeting of the Task Force was held on October 31, 2025. To meet the current deadline for completion of work, the Task Force would be obliged to report to the Board at its September 24-25, 2026 meeting.

While that deadline is not implausible, the Task Force realizes that complying with its responsibility to "communicate about its process with members and the public and seek input"[1] will take some time. For this reason, and out of an abundance of caution, by unanimous consent at its meeting on May 18, 2026, the Task Force authorized the Chair to request an extension of the Charter.

Accordingly, the Task Force requests an extension of the Charter deadline to May 1, 2027, which will give the Task Force sufficient time to (1) engage in meaningful stakeholder outreach and communication and (2) report to the Board at its May 13-14, 2027 meeting, or sooner.

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[1] This element of the Charter further requires the Task Force to "including Force the directive to "obtain advisory perspectives from stakeholder groups with an interest in the content of the oath, including new and young lawyers; senior lawyers; the access to-justice community; the judiciary; law schools and law students; Inns of Court; WSBA Sections; and county, affinity, and specialty bar associations."

**Info for Risk/Fiscal/Equity Analyses**

The proposed extension has a fiscal impact to accommodate in-person Task Force meetings and an interim presentation to the Board of Governors at a future meeting. In-person meetings average $450 per meeting to reimburse volunteers' travel, and attendance at BOG meetings is estimated at $500 per meeting. If the extension is granted and the Task Force meets monthly during this time and presents once to the Board of Governors, the fiscal impact is estimated at $3,200.

As for the Risk and Equity Analyses, neither the scope nor the nature of this initiative has changed since these analyses were done at the time the Task Force was proposed and approved by the BOG. The only request being submitted for action is to extend the timeline of the project for six months to ensure adequate stakeholder engagement. This would appear to have no Risk or Equity impact.

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

Provided as confidential materials.

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

As described in the above information section, the primary fiscal impact of proposed amendment is the travel costs associated with in-person meetings and presentation to the Board of Governors estimated at $3,200. Travel costs are reimbursed based on rates and limitations outlined in WSBA's Fiscal Policies and include items such as mileage, meals and accommodations. If approved, these expenses will be added to the FY 2027 Budget which will be presented to the Board of Governors for approval in September 2026. Additionally, the fiscal impact includes staff time used to assist in drafting the proposal, incorporating changes into relevant records, communicating changes to stakeholders, and providing administrative support to volunteers. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and does 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.*

By extending the deadline for completing his work and presenting its report, it will allow for more thorough and targeted community input, feedback and communications which may contribute to a more inclusive process and equitable outcome. To this end, we see no equity concerns with this proposed extension. As the task force continues its work, we encourage it to consider who may be most impacted by any proposed changes and proactively engage them in ways that are accessible for them.

Attachment

- Proposed Oath Review and Drafting Task Force Charter Extension

WASHINGTON STATE
BAR ASSOCIATION

# CHARTER

## Oath Review and Drafting Task Force

**Adopted: July 18, 2025.**
**Extended July 24, 2026.**

### Background

Oaths of legal practitioners in the state of Washington are found in Admission and Practice Rule (APR) 5. There is an Oath of Attorney, as well as corresponding Oaths for Limited Practice Officers (LPO) and Limited License Legal Technicians (LLLT).[1] Taking the oath is a preadmission requirement for each license type, and the oath, in most cases, must be taken in person, by telephone, or by videoconference before an elected or appointed judge sitting in the state of Washington.[2] The Oath of Attorney has been a component of the Admission and Practice Rules (formerly known as the Rules for Admission to Practice) since 1938. The oath adopted by the Supreme Court was based on the statutorily prescribed oath first adopted by the Washington Legislature in 1917, though language used in the oath appears to date back to Territorial laws enacted in 1863. The Oath of Attorney has been amended from time to time,[3] but much of the language that remains is derived from the statute. The Oath for LPOs was added to the APR in 2017, formerly appearing in the Regulations of the APR 12 Limited Practice Board; it was initially adopted in 1987 as part of the former Rules for Admission and Certification to Limited Practice. The Oath for LLLTs was adopted in 2012.

### Task Force Purpose and Responsibilities

The Oath Review and Drafting Task Force is established to evaluate whether WSBA should suggest the Supreme Court amend Washington State's APR 5 oaths in ways that would update and reinvigorate them. Should the Task Force recommend amendment of the oath, it shall prepare draft amendments for the Board of Governors' consideration. In performing these responsibilities, the Task Force shall proceed according to the following objectives and guidelines.

- The Task Force shall communicate about its process with members and the public and seek input. The Task Force shall, in particular, obtain advisory perspectives from stakeholder groups with an interest in the content of the oath, including new and young lawyers; senior lawyers; the access-to-justice community; the judiciary; law schools and law students; Inns of Court; WSBA Sections; and county, affinity, and specialty bar associations.
- The Task Force shall gather and review historical materials about the development of Washington State's oaths, as well as perform a comparative analysis of the oaths in use by other jurisdictions.
- The Task Force shall consider whether it is advisable to consolidate the three existing oaths into one oath.
- The Task Force shall, in considering the content of the oath, recognize that violation of the oath can be a basis for discipline in Washington. See RPC 8.4(k); LPORPC 1.10(e); LLLT RPC 8.4(k).

[1] *See* APR 5(g), (h), (j).

[2] APR 5(f). Note that in June 2025, the Supreme Court adopted changes to the oath requirements in order to permit oaths to be taken by telephone or videoconference.

[3] For example, in the 1950s, the Oath included the following language: "I am not now and never have been a member of any organization or party having for its purpose and objective the overthrow of the United States government by force or violence." *See* Ralph S. Brown & John D. Fassett, *Loyalty Tests for Admission to the Bar*, 20 U. CHI. L. REV. 480, 485 (1952-1953).

- The Task Force shall provide periodic updates to the Board of Governors about its progress.
- The Task Force shall ensure that its recommendations are consistent with WSBA's organizational parameters as defined in General Rule 12.2.
- The Task Force shall submit a final report to the Board of Governors, including, as appropriate, draft amendments to the oaths and related rules.

**Timeline**

The work of the Task Force shall be accomplished according to the following schedule:

- Begin meeting no more than six weeks after member and chair appointments are completed;
- Complete work and submit a final report not later than one year after the first Task Force meeting, unless the timeline for completion is extended by the Board;
- If the Board of Governors approves a recommendation to submit suggested amendments to the Supreme Court, prepare a set of suggested rule amendments and GR 9 materials for submission to the Supreme Court before the first GR 9 deadline after the draft amendments are approved.

**Task Force Membership**

The Task Force shall consist of the following voting members:

- An active WSBA member, not currently serving on the Board of Governors, who shall serve as Chair;
- Two current or former members the Board of Governors or WSBA officers;
- Six members of the WSBA, including at least one Limited Practice Officer or Limited License Legal Technician and a judicial member.

In recruiting and appointing voting members, consideration shall be given to diversity in a range of areas, including gender, ethnicity, disability status, sexual orientation, geography, areas of practice, and practice experience.

In accordance with WSBA Bylaws Art. IX(B)(2), selection of the chair and persons to be appointed to the Task Force will be made by the President with confirmation by the Board of Governors.

The Executive Director shall designate a WSBA staff liaison.

**Meetings**

The presence of a majority of Task Force members at a meeting constitutes a quorum. A quorum must be present at the time any vote is taken. Decisions of the Task Force shall be made by majority vote of members present at the time of the vote.

**Extended Timeline**

On July 24, 2026, the Board of Governors extended the deadline for completion of work and submission of a final report to May 1, 2027.

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Renata Garcia, Chief Regulatory Counsel

**DATE:** June 15, 2026

**RE:** Definition of Approved Law Schools – Proposed Amendments to WSBA Admissions Policies

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**CONSENT**: Approve proposed amendments to the WSBA Admissions Policies that refine and clarify the definition of "law school approved by the Board of Governors."

The Washington Supreme Court, in Rule 2(a)(5) of the Admission and Practice Rules (APR), delegated to the Board of Governors the power to approve law schools for the purposes of admission and licensure to practice law and also to maintain a list of the approved law schools. The Board of Governors adopted a new definition of approved law schools at its meeting in May 2026. The new definition will be effective September 1, 2026.

After receiving questions and feedback about the new definition of "Law school approved by the Board of Governors," we propose edits to clarify that:

1. A law school may be considered approved only if it is accredited, or provisionally accredited, by the American Bar Association (ABA) at the time the degree is conferred.
2. A non-ABA-accredited law school must be approved or accredited by a state or territory of the United States or the District of Columbia, rather than merely recognized.
3. The applicant would be eligible to sit for the bar exam in the other jurisdiction based on the JD received.

The same effective date as the new definition would apply to the amendments (September 1, 2026).

Additional information, including the fiscal, equity, and WSBA risk analyses are included in the attached memo.

Attachments

1. Proposed Amendments to the WSBA Admissions Policies – Markup
2. BOG Cover Memo with Attachments, dated April 7, 2026

**ADMISSIONS POLICIES OF THE WASHINGTON STATE BAR ASSOCIATION**

Under the authority of, and consistent with, the Washington Supreme Court's Admission and Practice Rules (APR), the Board of Governors of the Washington State Bar Association (Bar) has adopted the following Admissions Policies in administering those rules. These policies apply to individuals seeking reinstatement under APR 25 or admission to the Bar as a lawyer, limited practice officer (LPO), house counsel or foreign law consultant. These policies supplement APR 3-5, 8(f), 14 and 20-25. Any discrepancy or conflict between these policies and the APR is unintentional and will be resolved in favor of strict compliance with the APR.

Adopted July 1, 2012. Amended July 28, 2017, amendments effective September 1, 2017.
Amended November 14, 2020, amendments effective December 1, 2020.
Amended January 13, 2022, amendments effective February 1, 2022.
Amended June 9, 2023, amendments effective September 1, 2023.
Amended July 15, 2024, by Court order, amendments effective September 1, 2024.
Correction approved March 21, 2025.
Correction on August 12, 2025, to section X in compliance with APR 3(d).
Amended and correction approved November 14, 2025, amendments effective February 1, 2026.
Amended July **, 2026, amendments effective September 1, 2026.

**I. GENERAL PROVISIONS AND DEFINITIONS**

A. Applications

Applications for admission to practice law in Washington must be completed and submitted online or as prescribed by the Bar's admissions staff.

B. Definitions

"Attorney Applicant" means a person applying for admission as a lawyer under APR 3 or a person petitioning for reinstatement under APR 25 who, at the time of filing the application, has ever been admitted to practice law as a lawyer (or the equivalent for that jurisdiction) in any jurisdiction other than Washington.

"Foreign Law Consultant Applicant" means a person applying for licensure as a foreign law consultant under APR 14.

"General Applicant" means a person applying for admission as a lawyer under APR 3 who, at the time of filing the application, has never been admitted to practice law as a lawyer (or the equivalent for that jurisdiction) in any jurisdiction other than Washington, or a person petitioning for reinstatement under APR 25 who has been admitted to practice law in Washington only.

"House Counsel Applicant" means a person applying for licensure as house counsel under APR 8(f).

"Law school approved by the Board of Governors" is a law school either (1) approved or accredited, or provisionally approved or accredited, by the American Bar Association (ABA) at the time the degree was conferred or (2) ~~recognized~~ approved or accredited by a state or territory of the United States or the District of Columbia and a state or territory of the United States or the District of Columbia accepts the Juris Doctor (J.D) from that law school as meeting the education requirement to be eligible to sit for the bar exam in that jurisdiction at the time the ~~Juris Doctor~~ J.D. or LL.M. degree for the practice of law was conferred. An applicant who graduated from a law school not approved or accredited by the ABA bears the burden of demonstrating to the Bar that the law school is ~~recognized~~ approved or accredited by a state or territory of the United States or the District of Columbia and a state or territory of the United States or the District of Columbia accepts the J.D. as meeting the education requirement to be eligible to sit for the bar exam in that jurisdiction or otherwise meets this definition.

"LPO Applicant" means a person applying for admission, or petitioning for reinstatement under APR 25, as a limited practice officer.

**II. – XI. [Unchanged.]**

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Renata Garcia, Chief Regulatory Counsel

Jordan Couch, Governor At-Large

**DATE:** April 7, 2026

**RE:** Definition of Approved Law Schools – Proposed Amendments to WSBA Admissions Policies

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**DISCUSSION & FIRST READ**: Presented for discussion are proposed amendments to the WSBA Admissions Policies that would change the definition of approved law schools.

Purpose

The purpose for the proposed amendments is to change the definition of approved law schools that qualify for admission and licensure to practice law in Washington.

Background

The Washington Supreme Court, in Rule 2(a)(5) of the Admission and Practice Rules (APR), delegated to the Board of Governors the power to approve law schools for the purposes of admission and licensure to practice law and also to maintain a list of the approved law schools. In 1978, the Board of Governors adopted the list of ABA-accredited law schools as approved law schools. The definition of approved law schools has not changed significantly since then. See definition of "Approved Law School" in section I.B. of the WSBA Admissions Policies.

Proposal

The proposed amendments would keep the ABA-accredited law schools on the approved list but would also add law schools that other states have recognized as meeting the education requirements to sit for the bar exam in that jurisdiction. The burden would be on the applicant for admission to demonstrate that the law school is so recognized by another state. Finally, the defined term "Approved Law School" would be changed to "Law school approved by the Board of Governors" as that is the term used in the APR. See, for example, APR 3(b)(1), "graduation with Juris Doctor (JD) degree from a law school approved by the Board of Governors."

Rationale

Expanding the definition of approved law school beyond exclusive reliance on ABA accreditation is consistent with emerging national trends and regulatory innovation in lawyer licensure. A few states already recognize state-level accredited law schools. Alabama, California, Connecticut, Massachusetts, and Tennessee allow bar eligibility through non-ABA law schools[1]. More recently, Texas and Florida have moved to eliminate sole reliance on ABA accreditation as well. These models demonstrate that states can maintain rigorous standards for competency and public protection while broadening access to the legal profession.

[1] See, Domestic Legal Education – NCBE Comprehensive Guide to Bar Admission Requirements at ncbex.org.

This proposal would also align with Washington's other pathways to licensure. Washington already grants licenses to people who did not go to ABA accredited law schools. As it stands now, to be eligible to take the bar exam in Washington one must have gone to an approved law school. However, lawyers who have practiced more than one year in another state, regardless of what law school they attended, are eligible for licensure through admission by motion. In addition, Washington licenses individuals who have only a foreign law degree, or who completed the law clerk program without attending any law school at all.

Expanding the definition of approved law school is consistent with Washington's current practice, would support innovation in legal education, and reduce unnecessary barriers to entry without compromising quality.

Information for Fiscal Analysis

The proposed amendments have very little financial impact on the WSBA. There will be some small expense for updating the application software with the new list of approved law schools as well as some staff time for communication updates.

Information for Equity Analysis

Adding additional law schools to the approved list reduces barriers and allows more people from diverse backgrounds to enter the legal profession in Washington.

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

The risk analysis is available as confidential materials.

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

The proposed amendments have a fiscal impact on a variety of areas. Primarily the impact with be on costs associated with indirect expenses for staff time dedicated to drafting the proposal, updating applicable records, and disseminating information regarding changes to stakeholders. These tasks fall within the routine responsibilities of current WSBA personnel and will not necessitate additional staffing or significant resources from other internal departments. As noted above, there will likely be a minimal amount of direct expenses to support software updates to the WSBA's admissions system for these amendments. Lastly, there may also be an increase in revenue from bar exam applications submitted by candidates who were previously ineligible to sit for the exam, but this is unlikely to lead to a material increase.

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 analyses is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all.

The proposed amendments to WSBA admissions policies regarding the definition of approved law schools has the potential to enhance fairness and consistency in the admissions process, and to reduce unnecessary barriers to

entering the Washington legal profession, especially given that pathways into the WSBA through non-ABA accredited law schools already exist.

Attachments

1. Proposed Amendments to the WSBA Admissions Policies – Markup
2. Memo re Approved List of Law Schools for Bar Examination Purposes, BOG Materials, June 1978
3. List of known law schools recognized by other states to qualify for the bar exam
4. *Court Opens Door to New Law School Accreditors for Bar Admission*, The Florida Bar News, Jan. 16, 2026
5. Texas Supreme Court Order re Misc. Docket No. 26-9002, January 6, 2026

**ADMISSIONS POLICIES OF THE WASHINGTON STATE BAR ASSOCIATION**

Under the authority of, and consistent with, the Washington Supreme Court's Admission and Practice Rules (APR), the Board of Governors of the Washington State Bar Association (Bar) has adopted the following Admissions Policies in administering those rules. These policies apply to individuals seeking reinstatement under APR 25 or admission to the Bar as a lawyer, limited practice officer (LPO), house counsel or foreign law consultant. These policies supplement APR 3-5, 8(f), 14 and 20-25. Any discrepancy or conflict between these policies and the APR is unintentional and will be resolved in favor of strict compliance with the APR.

Adopted July 1, 2012. Amended July 28, 2017, amendments effective September 1, 2017.
Amended November 14, 2020, amendments effective December 1, 2020.
Amended January 13, 2022, amendments effective February 1, 2022.
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Correction approved March 21, 2025.
Correction on August 12, 2025, to section X in compliance with APR 3(d).
Amended and correction approved November 14, 2025, amendments effective February 1, 2026.
Amended July **, 2026, amendments effective September 1, 2026.

**I. GENERAL PROVISIONS AND DEFINITIONS**

A. Applications

Applications for admission to practice law in Washington must be completed and submitted online or as prescribed by the Bar's admissions staff.

B. Definitions

~~"Approved Law School" means a law school approved by the Board of Governors. Only those law schools approved, or provisionally approved, by the American Bar Association at the time the J.D. was conferred are approved by the Board of Governors. A list of ABA approved law schools is available on the ABA website.~~

"Attorney Applicant" means a person applying for admission as a lawyer under APR 3 or a person petitioning for reinstatement under APR 25 who, at the time of filing the application, has ever been admitted to practice law as a lawyer (or the equivalent for that jurisdiction) in any jurisdiction other than Washington.

"Foreign Law Consultant Applicant" means a person applying for licensure as a foreign law consultant under APR 14.

"General Applicant" means a person applying for admission as a lawyer under APR 3 who, at the time of filing the application, has never been admitted to practice law as a lawyer (or the equivalent for that jurisdiction) in any jurisdiction other than Washington, or a person petitioning for reinstatement under APR 25 who has been admitted to practice law in Washington only.

"House Counsel Applicant" means a person applying for licensure as house counsel under APR 8(f).

"Law school approved by the Board of Governors" is a law school approved or accredited, or provisionally approved or accredited, by the American Bar Association or recognized by a state or territory of the United States or the District of Columbia as meeting the education requirement to be eligible to sit for the bar exam in that jurisdiction at the time the Juris Doctor or LL.M. degree for the practice of law was conferred. An applicant who graduated from a law school not approved by the ABA bears the burden of demonstrating to the Bar that the law school is recognized by a state or territory of the United States or the District of Columbia as meeting the education requirement to be eligible to sit for the bar exam in that jurisdiction or otherwise meets this definition.

"LPO Applicant" means a person applying for admission, or petitioning for reinstatement under APR 25, as a limited practice officer.

**II. – XI. [Unchanged.]**

To: Board of Governors, Washington State Bar Association

Re: Approved List of Law Schools for Bar Examination Purposes

This memorandum responds to a request to report to the Board of Governors as to the utility and propriety of employing the American Bar Association approved list of law schools as constituting those law schools whose graduates are eligible to apply to sit for the Washington State Bar Examination. Consideration of the question is limited to the concept of protection of the public interest to the end that the results of the Bar Examination can be reasonably interpreted as evidencing qualification to practice law in the State of Washington.

In preparation of this memorandum, the following materials have been particularly examined: Survey of the Legal Profession; Reports of Consultant and the Advisory and Editorial Committee on Bar Examinations and Requirements for Admission to the Bar (1952) and particularly Chapter VII on "The Accreditation of Law Schools"; American Bar Association report on "Approval of Law Schools; Standards and Rules of Procedure" (as amended 1977); Memoranda 7778-27 and 7778-33 of the American Bar Association Section of Legal Education and Admissions to the Bar setting out interpretations of the standards and rules of procedure for approval of law schools and amendment thereto; current list of "Law Schools on the Approved List of the American Bar Association" listed by state, number of full-time and part-time students by class year, minority participation, total enrollment, degrees, charges, college prerequisites, required credits, full-time and part-time staff, library capacity.

This memorandum states and comments upon a series of questions relevant to a recommendation on the subject to the Board of Governors.

1. Is it both useful and necessary for the Washington State Bar Association to define a list of approved law schools in connection with eligibility for applicants to sit for the Washington State Bar Examination? Any school, of whatever form, length, staff, curriculum whatsoever can designate itself a "Law School". On this basis, the question appears to be self-answering. While the three-day bar examination can identify applicants whose responses evidence disqualification (e.g. as to knowledge of specific fields of law or as to ability of analysis and expression), it is impossible in such an examination to cover all fields of law to a degree that guarantees competence in the interests of protection of the public. As a starting premise, it is therefore necessary to be sure that the applicants have successfully passed a course of adequate legal instruction. A determination of adequacy of such instruction

requires a recognition that the school meet some standard other than merely self-designation as a Law School. Accordingly there must be a method of approving those law schools whose graduates have received such adequate training as to be eligible for examination and admission.

2. Can the WSBA or the Washington Supreme Court adequately determine on an independent basis the standards of all law schools in the United States? As a practical matter this cannot be independently done in this state. There are literally hundreds of law schools in the United States. To test each law school on a continuing basis as to such matters as curriculum, entrance examinations, staff, courses of study, etc., is utterly beyond the manpower capacity of the Association or the court or other local body.

3. Are the American Bar Association's standards for accreditation ones which would be independently selected by the WSBA or the Supreme Court? The basic subjects under which the standards of accreditation are detailed, as set by the Council of the Section of Legal Education and Admissions to the Bar and approved by the House of Delegates of the American Bar Association, are outlined as follows:

Organization and administration
Educational program
Faculty
Admission
Library
Physical plant

Attached are detailed expressions on these subjects as amended in 1977. Were the Washington State Bar Association or the Washington Supreme Court to specify general subjects of qualification, we believe they would coincide with the above list; the detailed expressions on those subjects are, in their entirety, appropriate to measure adequacy of training of law school graduates.

4. Are the ABA standards and procedures carefully and fairly administered? The basic administration of the accreditation program is by the Council of the Section of Legal Education and Admissions to the Bar, a standing section of the American Bar Association. Actions of the Council are subject to confirmation by the House of Delegates of the American Bar Association. Adequate procedural standards are established for policing the continued meeting of the standards of accreditation, for removing schools from the accredited list and for adding and reinstating law schools to that list. The annual list of approved law schools with current data as to significant features of qualification evidences the continuing attention of the Council to the

accuracy of the approved list. An illustration in this state of a threatened loss of accreditation of one law school, and the resultant improvement in the organization and administration of that law school evidences the useful care exercised by the Council in assuring the reliability of the list of approved schools.

5. Does application of the ABA standards by the WSBA endanger qualification and eligibility of graduates of the three law schools in this state? All three law schools in the State of Washington are on the approved list of the American Bar Association; there are no unaccredited schools in this state.

6. Are the ABA standards generally recognized and applied? While a completely current summary of requirements for examination and admission in all states is not available, the most recent one examined evidences that 39 states and the District of Columbia make reference to the ABA approved list of law schools in connection with eligibility for examination and admission. The application of the standards is not completely uniform, some of the states apply the standards only for out-of-state law students; some have supplemental lists approved by the State Department of Education or the State Supreme Court and some refer additionally to the list of member schools of the American Association of Law Schools. While not determinative of their propriety, the widespread acceptance of the ABA list of approved law schools evidences that the ABA standards and list of approved law schools coincide with standards recognized in a substantial majority of the states.

7. Does application by the WSBA of the ABA standards and list of approved law schools discriminate against individually qualified graduates of unaccredited schools? While obviously there is a degree of discrimination in any approval list, the differentiation does not appear to be unfair. In the first place there are plenty of accredited law schools to accommodate those who have a pre-entry intent to practice law in Washington. Attached is a current list of the accredited schools, 164 in number. They are located in 47 states, the District of Columbia and Puerto Rico. Only Alaska, Nevada and Rhode Island are not represented in the list (we understand that there is no law school in Alaska and that situation may also apply in Nevada and Rhode Island). Additionally, the WSBA has an alternative of clerkship studying for applicants who are not graduates of approved law schools, and grants advanced standing for graduates of non-approved schools. Accordingly there are channels which can be pursued by graduates of unaccredited law schools for admission in Washington.

8. Does the application by the WSBA of the ABA standards limit the number of lawyers being admitted to practice in this state, to the prejudice of the public? As noted, the current list of approved law schools is 164 in number. In all recent years there has been a substantial increase in the number of individuals annually admitted to the practice of law in Washington. Currently there are more than 8,000 lawyers and admissions are at a rate of approximately 10% a year. Reports of recent admittee questionnaires indicate that a substantial number of them are underemployed. No evidence is perceived that the employment of the ABA approved law school list operates as a deterrent to the numbers of lawyers admitted to practice in this state.

Based on the foregoing considerations, it is suggested that a resolution in substantially the following form be adopted by the Board of Governors of the Washington State Bar Association:

"RESOLVED that the Washington State Bar Association hereby confirms the application of the standards of accreditation of law schools as adopted by the Council of the Section of Legal Education and Admissions to the Bar of the American Bar Association and confirmed by the House of Delegates, as the standards applicable in determining approval of law schools whose graduates are eligible to apply to sit for the Washington State Bar Examination;

FURTHER RESOLVED that the Washington State Bar Association hereby adopts the list of such ABA-accredited law schools, and as such list may be modified by addition thereto or deletion therefrom, as the list of approved law schools whose graduates are eligible to apply to sit for the Washington State Bar Examination."

## State-Approved Law Schools[1] -- April 4, 2026

| Locale<br>State (city) | Law School | State(s)<br>Approval |
|---|---|---|
| Alabama (Birmingham) | Birmingham School of Law[6] | Alabama |
| Alabama (Birmingham) | Miles Law School[8] | Alabama |
| California (Chico) | Cal Northern School of Law[17] | California |
| California (Ventura) | Colleges of Law | California |
| California (San Francisco) | Golden gate University School of Law | California |
| California (online) | JFK School of Law, National University[21] | California |
| California (Bakersfield) | Kern County College of Law | California |
| California (Stockton) | Laurence Drivon School of Law, Humphreys University | California |
| California (Sacramento) | Lincoln Law School of Sacramento | California |
| California (San Jose) | Lincoln Law School of San Jose | California |
| California (Seaside) | Monterey College of Law | California |

[1] See also: List of law schools in the United States - Wikipedia

| Locale<br>State (city) | Law School | State(s)<br>Approval |
|---|---|---|
| California (Sacramento) | Northwestern California University School of Law | California |
| California (Los Angeles) | Purdue Global Law School, Purdue University Global[15] | California |
| California (Clovis) | San Joaquin College of Law | California |
| California (Menlo Park) | St. Francis School of Law[23] | California |
| California (San Diego) | Thomas Jefferson School of Law | California |
| California (Santa Ana) | Trinity Law School, Trinity International University | California |
| California (Ontario) | University of La Verne College of Law | California |
| California (Inglewood), (Chatsworth) | University of West Los Angeles School of Law | California |
| Massachusetts (Andover) | Massachusetts School of Law | Massachusetts, Connecticut |
| Tennessee (Nashville) | Nashville School of Law | Tennessee |

# COURT OPENS DOOR TO NEW LAW SCHOOL ACCREDITORS FOR BAR ADMISSION

Jan 16, 2026 By Samadhi Jones Senior Editor Top Stories

**The rule changes specify that any new accrediting agency must be recognized by the U.S. Department of Education and approved by the court, which has exclusive jurisdiction to regulate admission to the Bar according to Florida's Constitution.**

The Florida Supreme Court on January 15 amended admissions rules to eliminate the ABA as the sole law school accreditor for Florida Bar eligibility, creating a framework for additional accrediting bodies to be recognized by the court.

"The Court's goal is to promote access to high-quality, affordable legal education in law schools that are committed to the free exchange of ideas and to the principle of nondiscrimination," the opinion states. "To be clear, under the rule changes, graduates of ABA-accredited law schools will continue to be eligible to sit for the bar examination, and the rule changes do not preclude any law school from continuing to seek ABA accreditation."

The case, *In Re: Amendments to Rules Regulating The Florida Bar and Rules of the Supreme Court Relating to Admissions to The Bar,* **SC2025-2064**, creates "the opportunity for additional entities to carry out an accrediting and gatekeeping function on behalf of the Court."

The rule changes specify that any new accrediting agency must be recognized by the U.S. Department of Education and approved by the court, which has exclusive jurisdiction to regulate admission to the Bar according to Florida's Constitution. Currently, the ABA is the only accreditor of law schools recognized by the U.S. Department of Education.

No additional accrediting agency has yet been identified, and the court has not finalized its procedure for approving institutional accreditors. The opinion says that the court will contact the seven agencies recognized by the U.S. Department of Education for accrediting institutions offering degree programs to assess their interest in accrediting law schools.

The Workgroup on the Role of the American Bar Association in Bar Admission Requirements, which was created by the court in March 2025, was charged with studying the current framework and requirements for Bar admission and proposing alternatives that would "end reliance on the ABA." The workgroup submitted 12 alternatives for the court's consideration in October 2025. (For details, see the *News* article, **Court workgroup explores alternatives to ABA role in Bar admissions**.)

The amendments to the Rule of the Supreme Court Relating to Admissions to the Bar 4-13.2 (Definition of Accredited) require adoption of conforming amendments to the following Rules Regulating The Florida Bar: 1-3.9 (Law Faculty Affiliates), 4-6.6 (Short-Term Limited Legal Services Programs), 11-1.2 (Activities), 11-1.3 (Requirements and Limitations), 11-1.8 (Practice After Graduation), 12-1.2 (Definitions), 20-3.1 (Requirements for Registration), and 21-2.1 - 2 - (Eligibility) and Rule of the Supreme Court Relating to Admissions to the Bar 3-14.1 (Filed as an Applicant). The amendments become effective October 1 at 12:01 a.m.

Justice Jorge Labarga filed a dissenting opinion, saying that "the ABA has developed incomparable expertise in the accreditation process" during its 34 years as the sole law school accreditor. Citing language from the workgroup's report, Justice Labarga pointed to standards developed by the ABA that "provide consumer protections, public accountability and institutional transparency . . . protecting against predatory admissions and poor programs outcomes."

Interested parties have 75 days to file comments. Those requesting an oral argument must file comments and submit the request by March 31.

# Supreme Court of Texas

Misc. Docket No. 26-9002

**Final Approval of Amendments to**
**Rule 1 of the Rules Governing Admission to the Bar of Texas**

**ORDERED** that:

1. On April 4, 2025, in Misc. Dkt. No. 25-9018, the Court invited comments on the law school accreditation component of the Rules Governing Admission to the Bar of Texas. Specifically, the Court requested feedback on:

   a. whether to reduce or end the Rules' reliance on the American Bar Association; and

   b. alternatives the Court should consider.

2. On September 26, 2025, in Misc. Dkt. No. 25-9070, the Court proposed amendments to Rule 1 of the Rules Governing Admission to the Bar of Texas and again invited public comment.

3. No additional changes have been made to the proposed amendments following the comment period. This order gives final approval to the amendments set forth in Misc. Dkt. No. 25-9070 and reproduced below, effective immediately.

4. This order also gives final approval to the initial list of law schools approved by the Court as satisfying the law study requirements for licensure, published in Misc. Dkt. No. 25-9070 and attached to this order. The list includes all law schools that are currently approved under the Court's existing rules.

5. In Misc. Dkt. No. 25-9070, the Court advised that it intends to provide stability, certainty, and flexibility to currently approved law schools by guaranteeing ongoing approval to schools that satisfy a set of simple, objective, and ideologically neutral criteria using metrics no more onerous than those currently required by the ABA. At this time, the Court has concluded that a law school already on Texas's list of approved schools need only ensure

compliance with ABA standards 316, 502(a)-(c), 503, and 509 in order to maintain ongoing approval by the Court.

6. In re-asserting its authority over the approval of law schools, the Court continues to advise that it:

   a. intends to preserve the portability of Texas law-school degrees into other states and to preserve the portability of out-of-state law-school degrees into Texas;

   b. does not intend to impose additional accreditation, compliance, or administrative burdens on currently approved law schools, which need not take any additional action in order to remain approved law schools in Texas;

   c. will not consider the fact that a law school loses ABA accreditation to be sufficient grounds for removal of the school from Texas's list of approved schools;

   d. intends to develop, in consultation with the Texas Board of Law Examiners, a deliberative approach to requests from law schools not currently accredited by the ABA that wish to be added to Texas's list;

   e. does not anticipate immediate changes to the current list of approved law schools; and

   f. may consider, in the future, returning to greater reliance on a multi-state accrediting entity other than the ABA should a suitable entity become available.

7. The Clerk is directed to:

   a. file a copy of this order with the Secretary of State;

   b. cause a copy of this order to be mailed to each registered member of the State Bar of Texas by publication in the *Texas Bar Journal*;

   c. send a copy of this order to the Governor, the Lieutenant Governor, and each elected member of the Legislature; and

   d. submit a copy of this order for publication in the *Texas Register*.

Date: January 6, 2026.

James D. Blacklock, Chief Justice

Debra H. Lehrmann, Justice

John P. Devine, Justice

J. Brett Busby, Justice

Jane N. Bland, Justice

Rebeca A. Huddle, Justice

Evan A. Young, Justice

James P. Sullivan, Justice

Kyle D. Hawkins, Justice

**Rule 1**
**Definitions and General Provisions**

(a) Frequently used terms are defined as follows:

***

(4) "Approved law school" means a law school approved by the ~~American Bar Association~~Supreme Court.

***

# Supreme Court of Texas

**Approved Law Schools**

The below law schools are approved by the Court as satisfying the law study requirements for admission to the Texas Bar:

Akron
Alabama
Albany
American
Appalachian
Arizona
Arizona State
Arkansas – Fayetteville
Arkansas – Little Rock
Atlanta's John Marshall Law School
Ave Maria School of Law
Baltimore
Barry University
Baylor
Belmont University
Boston College
Boston University
Brigham Young
Brooklyn
Buffalo
California – Berkeley
California – Davis
California – San Francisco
California – Irvine
California – Los Angeles
California Western
Campbell
Capital
Case Western Reserve
Catholic University of America
Chapman
Charleston
Chicago
Chicago-Kent
Cincinnati
City University of New York
Cleveland State
Colorado
Columbia
Connecticut
Cooley Law School
Cornell
Creighton
Dayton
Denver
DePaul
Detroit Mercy
District of Columbia
Drake
Drexel
Duke
Duquesne
Elon
Emory
Faulkner
Florida
Florida A&M
Florida International
Florida State
Fordham
George Mason
Georgetown
George Washington
Georgia

Georgia State
Golden Gate
Gonzaga
Harvard
Hawaii
Hofstra
Houston
Howard
Idaho
Illinois Chicago
Illinois
Indiana University – Bloomington
Indiana University – Indianapolis
Inter American
Iowa
Jacksonville
Judge Advocate General's School
Kansas
Kentucky
Lewis and Clark
Liberty
Lincoln Memorial
Louisiana State
Louisville
Loyola – Chicago
Loyola – Los Angeles
Loyola – New Orleans
Maine
Marquette
Maryland
Massachusetts
McGeorge
Memphis
Mercer
Miami
Michigan State
Michigan
Minnesota
Mississippi College
Mississippi
Missouri
Missouri – Kansas City
Mitchell Hamline
Montana
Nebraska
Nevada
New England Law – Boston
New Hampshire
New Mexico
New York Law School
New York University
North Carolina
North Carolina Central
North Dakota
Northeastern
Northern Illinois
Northern Kentucky
Northwestern
Notre Dame
Nova Southeastern
Ohio Northern
The Ohio State
Oklahoma
Oklahoma City
Oregon
Pace
Pennsylvania
Penn State – Dickinson Law
Pepperdine
Pittsburgh
Pontifical Catholic of Puerto Rico
Puerto Rico
Quinnipiac
Regent
Richmond
Roger Williams
Rutgers
St. John's
Saint Louis
St. Mary's
St. Thomas (Florida)
St. Thomas (Minnesota)
Samford
San Diego
San Francisco
Santa Clara
Seattle
Seton Hall

South Carolina
South Dakota
South Texas – Houston
Southern University
Southern California
Southern Illinois
Southern Methodist
Southwestern
Stanford
Stetson
Suffolk
Syracuse
Temple
Tennessee
Texas
Texas A&M
Texas Southern
Texas Tech
Toledo
Touro
Tulane
Tulsa
UNT Dallas
Utah
Vanderbilt
Vermont
Villanova
Virginia
Wake Forest
Washburn
Washington and Lee
Washington
Washington University
Wayne State
Western New England
Western State
West Virginia
Widener – Delaware
Widener – Commonwealth
Willamette
William and Mary
Wilmington
Wisconsin
Wyoming
Yale
Yeshiva

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

FROM: Kari Petrasek, WSBA President-elect

RE: 2026-2027 Chair Appointments

DATE: June 23, 2026

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**Consent:** Appointment of the 2026-2027 WSBA committee and board chairs listed below.

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 chairs for the year 2026-2027. The candidates' resumes are attached. All eligible members of the committees listed below were encouraged to apply for the Chair position. Additional Chair appointments forthcoming.

| Committee/Board | Recommended for Appointment |
|---|---|
| Board of Bar Examiners | Chair: Bruce Turcott<br>Vice-chair: Cathy Helman |
| Character and Fitness Board | Chair: Gabriel Rothstein<br>Vice-Chair: Jennifer Flynn |
| Client Protection Board | Chair: Carrie Umland |
| Committee on Professional Ethics | Chair: Michele Carney |
| Court Rules and Procedures Committee | Chair: Andrew Yi |
| Council on Public Defense | Chair-elect: Michael Schueler |
| Law Clerk Board | Chair: Sarah Propst |
| Legislative Review Committee | Chair: Matthew LeMaster |
| Small Town and Rural Council | Chair: Ashley Cummins (two-year term) |
| Washington New Members Committee | Chair-elect: Ariel Cook |

May 16, 2026

Dear Paris:

Please accept my renewal application for Chair, Board of Bar Examiners (BOBE), for FY 2026-27.

I have been a member of the BOBE since 2007. I graded nearly every exam and assisted with training new graders until becoming Chair in October 2020. I have been Chair for remote grading Winter and Summer 2021, in-person grading Winter 2022, remote grading Summer 2022, and in-person grading Winter 2023 through Winter 2026. In 2021, I participated with WSBA admissions staff in the initiation of Exam360 grading software, replacing the paper grading process.

We are currently preparing for the first administration of the NextGen exam in Summer 2026, which will mean a substantial change in grading practices, with a larger number of items with shorter answers. Also on the horizon are portfolio evaluations, which are expected to begin in 2027. Finally, we are working to recruit additional members to expand the grader pool by 50% to be prepared for these changes.

I have given presentations to the Executive Committee, Board of Governors, and Joint Minority Mentorship Program. I was appointed to the WSBA Equity and Diversity Committee and Washington Bar Licensure Task Force. With the Vice-Chair, admissions staff, and BOG liaison, I participate in recruiting, selecting, onboarding, and training BOBE members. It has truly been a pleasure working with these volunteers and staff.

I also participate in National Conference of Bar Examiners (NCBE) Annual Bar Admissions Conferences, am a member of the NCBE Outreach and Communications Committee, and have applied to join the NCBE Diversity Committee.

I would be honored to continue to assist WSBA in implementing the NextGen and portfolio evaluations.

My resume is attached.

Sincerely,

Bruce Turcott
blturcott@gmail.com
(360) 701-4052

**Bruce L. Turcott**
4308 5th Avenue NW
Olympia, Washington 98502
(360) 701-4052
blturcott@gmail.com

## Legal Experience

**Editor, *Cannabis Law Deskbook*, AG Alliance (2022-2024)**
Tracked developments in cannabis law across fifty-six U.S. jurisdictions and abroad, managed two dozen volunteer authors, edited annual editions and interim updates published by Thomson Reuters. Coordinated development and delivery of cannabis law and regulation courses in partnership with University of Arizona Law. Led monthly cannabis roundtable meetings of two dozen state Attorneys General offices.

**Senior Counsel, Attorney General's Office (2000-2022)**
Licensing and Administrative Law Division (2004-2022)
Lead counsel to Liquor and Cannabis Board, including implementation of Initiative 502 legalizing marijuana from 2012-2022. Co-chair of Attorney General's I-502 implementation work group. Drafted final orders for Director of Licensing. Advised Board of Accountancy and Executive Ethics Board. Served as co-counsel in defense of Initiative 1183 that privatized liquor. Served as prosecutor for 18 business and professional licensing programs, lead counsel for Employment Security Department, counsel for Environmental Hearings Office, team leader, and paralegal and law clerk supervisor. Won 2018, 2013, and 2012 AGO Excellence Awards. Won 2012, 2010, and 2009 Iditarod Awards for complex litigation. AGO fiscal note coordinator and division legislative coordinator.
Social and Health Services Division (2000-2004)
Served as lead counsel for Department of Social and Health Services contracts, financial recovery, information technology, lands and buildings, public disclosure, and public assistance programs. Represented state in mental health commitment hearings. Coordinated division bill analysis.

**Department of Social and Health Services, Division of Child Support**
Legislative Liaison (1998-2000) and Claims Officer (1992-1998)
Developed request legislation and obtained sponsors and passage. Coordinated bill analysis and participated in DSHS cabinet bill review. Presented at conferences and prosecutor trainings. Represented agency in approximately 500 adjudicative proceedings to establish child support.

**Session Attorney, Code Reviser's Office (1991-1993)**
Drafted 679 bills at request of legislators and agencies. Advised bill requesters on legislative process.

**Legal Counsel to CNMI School System; Assistant Attorney General (1990-1991)**
Served as counsel for Board of Education, U.S. Commonwealth of the Northern Mariana Islands Public School System personnel, procurement, and all legal matters. Assisted Governor mediate employee strike.

**Law Clerk, Chief Judge Sidney C. Volinn (1988-1989)**
Drafted Ninth Circuit Bankruptcy Appellate Panel opinions.

**Chief, Div. of Law; Assistant Attorney General; Federated States of Micronesia (1986-1988)**
Directed delivery of legal services to executive branch of newly self-governing former U.S. Trust Territory, including capital construction, fishery patrol, immigration, and national police. Wrote 50 attorney general opinions. Advised agency rulemaking. Supervised contract review. Drafted bills, testified, advised President.

**Law Clerk, Justice Barbara Durham, State Supreme Court (1986)**
Drafted majority opinions, concurrences, and dissents. Wrote pre-hearing bench memoranda.

## Other Experience

**Instructor**, English as a second language, Everett Community College, 1979-1981

**Teaching Assistant**, ESL intensive summer institute, University of Washington, 1979

**Sous Chef**, Gerard's Relais de Lyon, Bothell, 1976-1977

## Education and Bar Admission

**J.D.**, University of Washington School of Law, 1985

**M.Ed.**, Higher Education, University of Washington, 1979

**B.A.**, Anthropology, University of Hawaii, 1974

Admitted to practice in Washington, 1985; Federated States of Micronesia Supreme Court, 1986; U.S. District Court, W.D. Washington, 1989, E.D. Washington, 2000; Ninth Circuit, 2007; Tenth Circuit, 2016

## Publications

"Washington's Implementation of Legalized Cannabis: A Model for Other States and the Federal Government,"100 Wash. L. Rev. 125 (2025).

Editor, Cannabis Law Deskbook, AGA/Thomson Reuters, published 2021, 2022, 2023, 2024.

"Constitutional Jurisprudence of the Federated States of Micronesia Supreme Court," 6 UCLA Pac. Basin L.J. 103 (1989).

"Beginnings of the Federated States of Micronesia Supreme Court," 5 U. Haw. L. Rev. 361 (1983).

## Honors and Community Service

- National Conference of Bar Examiners, Communications and Outreach Comm., 2021-present; 7/26 NextGen Leadership Comm., 2024-present
- Chair, Board of Bar Examiners, Washington State Bar Association, 2020-present; Member, 2007-present
- State Supreme Court, Washington Bar Licensure Task Force, 2020-2022
- Washington State Bar Association, Equity & Disparity Workgroup, 2020-2023
- Founding Chair, Conference of Western Attorneys General AG Alliance Cannabis Project Advisory Council, 2019-2020
- Chair, National Association of Attorneys General Informal Cannabis Working Group, 2018-2022
- Frequent presenter on cannabis law, client advice, and administrative law; guest lecturer to UW Law School cannabis law seminar 11 times
- Compact of Free Association Islander Health Care Program Advisory Committee, 2018-2022
- Arbitrator, Financial Industry Regulatory Authority, 2013-present
- Attorney General's Excellence Awards, 2012, 2013, 2018
- Volunteer, WSBA Call to Duty – Pro Bono Legal Services for Veterans
- Volunteer Judge, University of Washington School of Law moot court and national competitions
- Former Board member and officer of Capitol Land Trust; negotiated conservation easements
- Member by invitation, American Society of Legal Writers
- American Jurisprudence Award, Professional Responsibility
- Won first-year law school moot court competition

**CATHY M. HELMAN**
[redacted]

June 1, 2026

Washington State Bar Association
1325 Fourth Avenue, Suite 600
Seattle, Washington 98101

Dear Bar Leaders,

Please allow me to retain my position as the vice-chair of the Board of Bar Examiners. I became a bar examiner in February 2014 and vice-chair in the fall of 2020. I have graded both the summer and winter exams every year and filled in for absentee graders when emergencies have arisen. I truly enjoy reading answers submitted by the applicants and seeing the different approaches when analyzing a challenging legal question. As vice-chair, I've enjoyed training new graders and providing support to the members of the Board of Bar Examiners before, during, and after the grading process.

The position as vice-chair of the Board of Bar Examiners has provided an opportunity to view the bar exam from a new angle. I've learned more about the processes that go into developing and administering the bar exam. I am currently a member of the Washington Bar Licensure Steering Committee for developing alternative pathways to the bar exam. I have worked with the bar leaders to ensure that the bar exam provides a fair and equitable process for admission into the Washington State Bar Association and the practice of law. I also BETA tested the NextGEN Bar exam and have participated in discussions regarding its implementation in Washington State. I look forward to continuing in this role and using my experience to maintain the integrity of the bar exam and the grading process.

Thank you for your consideration.

Sincerely,
Cathy M. Helman

# CATHY M. HELMAN

[redacted]
[redacted] ◦ [redacted]

## EMPLOYMENT

**Office of Administrative Hearings,** Spokane Valley**,** WA
Administrative Law Judge — November 2016- Present

- Presides over hearings for licensing cases, public assistance benefits, and child support payments
- Conducts prehearing conferences, motion hearings, and evidentiary hearings
- Issues written orders with detailed findings of fact and conclusions of law

**Burke Law Group, PLLC (now Allen Fischer, PLLC),** Spokane**,** WA
Associate — July 2015- May 2018

- Appellate contract with the Office of Public Defense for representation of indigent clients
- Prior work representing clients in Family Law Superior Court and Appellate Court matters, including dissolutions, paternity, child support, adoption actions, and Social Security appeals

**Washington State Court of Appeals, Division III,** Spokane**,** WA
Law Clerk for Hon. Teresa Kulik (ret.) and Hon. Robert Lawrence-Berrey — June 2011- July 2015

- Researched and wrote legal memoranda/first draft opinions for over 160 appeals court cases
- Conducted extensive research on criminal, civil, and dependency and termination matters
- Assessed oral arguments of litigants and counseled the Judge on the merits

**Washington State Court of Appeals, Division III,** Spokane, WA
Legal Intern for Jay Bromme, Staff Attorney — August 2009- May 2010

- Drafted decisions for prisoner Personal Restraint Petitions

## EDUCATION

**Gonzaga University School of Law,** Spokane, WA
Juris Doctor, *cum laude* — December 2010

**Utah Valley University,** Orem, UT
Bachelor of Science, Communications, *summa cum laude* — May 2008

## PROFESSIONAL AFFILIATIONS

**Washington State Bar Association** — Admitted May 2011

- Board of Bar Examiners- Exam grader — February 2013- May 2021
- Board of Bar Examiners- Co-chair — May 2021- Present

# GABRIEL ROTHSTEIN

[redacted], Wa • [redacted] • grothstein@snocopda.org or [redacted]

## EXPERIENCE

**Judge Pro tempore** King and Snohomish County
Worked as a Judge Pro tempore in King County District Courts and Everett Municipal Court 2024-present

**Snohomish County Public Defender's Office,** Everett Washington,
*Youth Access to Counsel – on call attorney* July 2023 – Present
Receiving on-calls from youth throughout the State of Washington who have been detained or arrested and must be provided with counsel before being questioned by law enforcement.
*71.09/SVP Unit* April 2023- Present
Represent clients under the 71.09 Civil Commitment/Sexually Violent Predator Law. This includes all aspects of the representation arguing motions, probable cause, trial. Clients are housed at the Special Commitment Center (SCC) as well as on LRA's in the community.
*Felony Unit,* July 2019 – April 2023
Represent adult clients charged with felony offenses in all stages of criminal hearings from probable cause through arraignment, pre-trial motions, trial, and post-trial hearings.
*Lead of Juvenile Unit,* November 2017- July 2019
Represent juvenile clients in all stages of criminal hearings from probable cause through arraignment, pre-trial motions, trial, and post-trial hearings. Supervise multiple lawyers in the juvenile unit. Attend meetings regarding youth advocacy and working to address issues in juvenile court.
*Juvenile Unit,* September 2016 - November 2017
Represent juvenile clients in all stages of criminal hearings from probable cause through arraignment, pre-trial motions, trial, and post-trial hearings.
*Felony Unit,* April 2013 – September 2016
Represent adult clients charged with felony offenses in all stages of criminal hearings from probable cause through arraignment, pre-trial motions, trial, and post-trial hearings.
*Misdemeanor Supervisor,* April 2010 – March 2013
Supervise approximately 12 lawyers in the misdemeanor unit. Aid and assist new lawyers in advocating for clients and managing the art of defending people accused of crimes.
*Felony Unit*, September 2006 – March 2010
Represent adult clients charged with felony offenses in all stages of criminal hearings from probable cause through arraignment, pre-trial motions, trial, and post-trial hearings.
*Adult Drug Court Attorney*, 2008-2010
Represented and advocated adults in the drug court program while carrying half of a felony caseload.
*Misdemeanor Unit*, January 2005- August 2006
Represent adult clients charged with misdemeanor offenses in all stages of criminal hearings from probable cause through arraignment, pre-trial motions, trial, and post-trial hearings

**Housing Justice Project,** Seattle, Washington
Volunteer Attorney 2004
**Unemployment Law Project**, Seattle Washington
Volunteer Attorney 2004

## BOARD PARTICIPATION

Holman Recovery Center in-patient substance abuse treatment facility – Board of Directors
WSBA Character and Fitness Board – Chairperson

## EDUCATION

**UCLA School of Law**, Los Angeles, CA
*Attended 2001-2003, Juris Doctorate*, May 2003

**Rutgers School of Law**, Newark, New Jersey
*Attended 2000-2001*
**Emory University**, Atlanta, GA
*Bachelor of Arts, Sociology*, June 1997 3.1

Gabriel Rothstein

grothstein@snocopda.org

5/12/2026

Washington State Bar Association

1325 Fourth Ave. Suite 600

Seattle, WA 98101

RE: Interest in continuing to serve as Chairperson of the WSBA Character and Fitness Board

Dear Bar Leaders,

My name is Gabriel Rothstein. I am a public defender in Snohomish County Washington. I have been a PD since January of 2005. I am dedicated to my job and to serving my clients to the best of my ability. I have held many different roles at my office, currently I am representing clients under the Civil Commitment/71.09 Statute.

I have served on the Character and Fitness Board since Approximately October of 2024. I was made Chairperson of the CFB in approximately April of 2025. I was a newer member of the board at the time, but I was recommended by the former chair, and I was interested in the opportunity so long as none of the longer serving members wanted the spot.

I cannot express how much I enjoy serving on this board. I find our work not only important but incredibly engaging. I find that my job as chair is to keep the board focused on the task at hand, but to also make sure that every board member has an opportunity to be heard. I frequently alternate the order in which board members ask questions of witnesses and/or the order in which board members speak during our deliberation sessions. It's important to me that all the voices are heard in particular the voices of our non-lawyer members. Their input is an invaluable part of our deliberation.

I would love to serve as the Chair of the CFB for the next year.

Thank you for your time and consideration, looking forward to hearing from you,

Gabe

GABRIEL ROTHSTEIN

Gabriel Rothstein WSBA 36009

# Jennifer Flynn

## Employment

**Skagit County Prosecutor's Office** October 2017 – Present
*Senior Deputy Prosecutor* Mount Vernon, WA

Prepare and try a variety of felony cases, with a particular focus on serious traffic offenses and domestic violence. Research, draft, and respond to complex litigation and motions. Conduct trials, testimonial hearings, and oral arguments to both the bench and juries. Prepare and present annual legal training for law enforcement agencies and provide legal advice to officers in the field during the course of investigation. Review referrals for charging decisions. Identify areas for additional investigation or evidence gathering. Negotiate resolutions on a high volume of cases while maintaining accountability on priority offenses. Communicate with victims and witnesses to preserve victims' rights and advance the integrity of the justice system. Mentor and collaborate with attorneys in the district court unit to advance their skill set. Previous roles in this office include the District Court and Juvenile Court units. Specialties and interests include mental health/competency, high risk victims, investigation of traffic fatalities, use of medical records in criminal cases, and forensic toxicology.

**Zachor & Thomas, Inc., PS.** June 2016 – October 2017
*Associate Attorney* Edmonds, WA

Primary prosecuting authority for City of Arlington and City of Lake Stevens. Reviewed evidence and interviewed witnesses in misdemeanor and infraction cases. Coordinated follow-up investigation with law enforcement. Interviewed and understood the needs of victims of domestic violence. Negotiated case dispositions. Prepared and presented a cohesive case narrative at trial. Appeared on a minimum of twelve in-custody and two out-of-custody calendars each week. Assumed primary responsibility for a criminal case load of roughly 300-400 active cases, 600 cases in warrant status, and a monthly flow of approximately 50 dispositions and 50 new filings. Assisted with training and supervision of Rule 9 interns.

**Northwest Justice Project** February 2016 – June 2016
*Volunteer Attorney* Bellingham, WA

Advocated for high-risk victims of domestic violence in Superior Court hearings. Drafted petitions for Domestic Violence Protection Orders. Reviewed transcripts of hearings before a commissioner to prepare for revision before a judge. Interviewed victims to help them shape testimony into a cohesive legal narrative. Researched and drafted motions for revision and review as necessary.

## Other Experience & Community Involvment

**Skagit Superior Court Forms Committee** December 2025-Present
*Committee member*
Collaborate with other stakeholders to review and draft forms for use in Superior Court criminal proceedings

**Skagit County Prosecuting Attorney's Guild** October 2025-Present
*Treasurer*

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**Leadership Skagit** September 2025-June 2026
*Member of Class of 2026*
Leadership development program combining coursework, community interaction, and a service project. Partnered with PFLAG Skagit to hold an event for local queer youth

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**WAPA Criminal Committee** November 2024-present
*Committee Member*
Develop the agenda and recruit presenters for Washington state's annual conference for prosecutors

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**WSBA Character & Fitness Board** October 2024-Present
*Board Member*

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**WSBA Adjunct Disciplinary Counsel Panel** October 2024-Present
*Adjunct Disciplinary Counsel*

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**Skagit Courthouse Security Committee** June 2024-Present
*Committee Member*
Adopt a courthouse security plan in compliance with GR 36 and develop security protocols for court staff, attorneys, and the public

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**Skagit County Teen Court** Fall 2022 – Present
*Attorney Mentor*
Provide training and support to high school students in a restorative justice program

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**Skagit Women's Alliance & Network (SWAN)** Winter 2021 – Fall 2022
*Board member*

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**Potential Impeachment Disclosure Committee** August 2019-Present
*Committee Member*
Internal committee to review allegations of misconduct and determine if an officer/witness should be placed on the PID list maintained by the prosecutor's office

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**Skagit County Domestic Violence Task Force** Spring 2018 – Present
*Co-chair/Representative of Prosecuting Attorney's Office*

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**Skagit County Gang Task Force** Summer 2018 – January 2025
*Representative of Prosecuting Attorney's Office*

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**Archbishop Murphy High School Mock Trial** Summer 2019 – Spring 2022
*Head Coach* Fall 2016 – Spring 2019
*Assistant Coach*

## Education

**Boston College Law School (BCLS)**, Newton, MA
*Juris Doctor, May 2015*

| | |
|---|---|
| Honors/Awards: | BCLS 2015 Mock Trial Competition, First Place; American Mock Trial Association 2015 Mock Trial New England Regional Competition, Semi-finalist; Public Interest Designation Fellow |
| Leadership: | BCLS Pro Bono Board, President; Public Interest Law Foundation, Stipends Coordinator; Immigration Spring Break 2014, Trip Co-Coordinator |
| Pro Bono: | Special Education Advocacy Training through Federation for Children with Special Needs; Special Education Surrogate Parent for a child in state custody; U-Visa Adjustment of Status through Voices for Immigrant Defense and Advocacy |
| Practical Experience: | Representation of juveniles in education and post-adjudication criminal matters through Juvenile Rights Advocacy Project, assistance with completion of forms related to adjustment of status via Latinas Know Your Rights project of Greater Boston Legal Services, Rule 9 Intern at Whatcom County Prosecutor's Office, Intern at Middlesex District Attorney's Office in Special Assault Unit and Conviction Integrity Unit. |

**Yale University**, New Haven, CT
*Bachelor of Arts in American Studies, May 2012*

| | |
|---|---|
| Selected Activities: | Community Health Educators; Yale Mock Trial Association; Hill Mentors Program; Prison Education Program |

June 4, 2026

President-elect Kari Petrasek

WSBA Board of Governors

To whom it may concern,

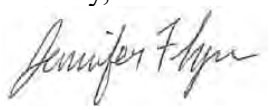
I am writing to convey my interest in serving as the vice-chair of the Character & Fitness Board. I was encouraged to apply by our current chair, Gabriel Rothstein. I have been a member of the Board for a little over 1.5 years and have greatly enjoyed the opportunity to serve the WSBA and the public.

As a member of the board, it has been a privilege to work with bar counsel and WSBA support staff. Prior to my service I had never been to the WSBA headquarters; now I look forward to our in-person meetings and feel more connected to the work of the WSBA as a whole. I have also enjoyed working with the diverse Board members, including attorneys from various practice areas as well as non-attorney members. Our deliberations are a welcome opportunity to escape from the silo of my criminal practice and consider different viewpoints.

I have been particularly impacted by hearing from applicants and petitioners appearing before the Board. It has been my goal to approach every hearing with an open mind and to make each person who appears before us feel that they have been treated with dignity and respect throughout the Character & Fitness process. While our recommendation is not always in their favor, it is always within our power to treat them with the civility and kindness that our profession aspires to.

I appreciate each of your work to the Bar and look forward to the opportunity to continue my own service. Please do not hesitate to contact me should you need to follow up on any aspect of this potential appointment.

Warmly,



Jennifer Flynn

# CARRIE D. UMLAND

## Professional Summary

Persuasive litigator providing legal counsel and representation to injured people. Skilled in fostering positive and trusting client relationships. Well-established knowledge of civil law and years of obtaining the best results for clients.

## Skills

- Litigation Strategy and Management
- Client Advocacy and Trial Preparation
- Legal Research & Documentation
- Legal Research & Documentation
- State & Federal Court Trials
- Reliable and Detail Oriented

## Work History

**TELARE LAW** – Richland, WA **Personal Injury Attorney**,
2025 to present

- Lead team that provides compassionate and efficient case management and resolution.
- Represent clients injured in automobile collisions, construction site injuries, premises liability, and dog bites.
- Experienced in the development and implementation of pre-litigation processes and litigation discovery plans, motions practice, and resolution by negotiation, ADR, or trial.

**PALACE PERSONAL INJURY LAW - University Place, WA**
Personal Injury Attorney, 2012 to 2025

- Represent clients injured in automobile collisions, construction site injuries, premises liability, and dog bites.
- Experienced in the development and implementation of pre-litigation and litigation discovery plans, motions practice, and resolution by negotiation, ADR, or trial.

## Earlier Positions

**GRAHAM LUNDBERG PESCHEL P.S – Seattle, WA Associate Attorney, 2005 to 2012**

**PLANCO FINANCIAL SERVICES/HARTFORD LIFE**
**Regional Marketing Director,** 2000 to 2005

**DAVID H. MIDDLETON & ASSOCIATES, P.S** – Federal Way, WA
**Associate Attorney,** 1998 to 2000

## Education & Credentials

**Juris Doctor -- SEATTLE UNIVERSITY SCHOOL of LAW**, 12/1994
**Washington Bar Admission** – June 1995 WSBA #24949

June 5, 2026

Carrie Umland
[redacted]
Carrie.Umland@TelareLaw.com

WSBA Bar Leaders
1325 4th Avenue, Suite 600
Seattle, WA 98101

Dear WSBA Bar Leaders,

I am writing to express my sincere interest in serving as chair of the Washington State Bar Association's Client Protection Board. I would welcome the opportunity to support the Board's important mission of helping protect the public, reinforcing confidence in the legal profession, and ensuring the fair and thoughtful administration of the Client Protection Fund.

I have served on the Client Protection Board since 2014 and served as chair from 10/02/20 through 9/30/24. The work we do as a Board is fulfilling and provides an opportunity to give back to the legal profession. I have thoroughly enjoyed serving as chair and have not applied since 2024 to give others the opportunity to serve. However, I would very much like to chair the Board again.

Thank you for your consideration. I would be grateful for the opportunity to serve in this capacity and to contribute to the continued strength and credibility of the WSBA's client protection efforts.

Sincerely,

Carrie D. Umland

Carrie Umland

**MICHAEL A. SCHUELER.**
901 FIFTH AVENUE, SUITE 2800C, SEATTLE, WA 98164
(425)736-8506 | MICHAEL@HSR-LAW.COM

## EDUCATION:

**National Criminal Defense College:** July-August 2019
- Intensive trial skills college
- Focus on client communication, voir dire, opening, cross, direct, and closing arguments over a two-week period under the tutelage of nationally renowned criminal defense lawyers

**Seattle University School of Law:** Juris Doctor, *Cum Laude*, May 2014
- Pro Bono Pledge – Outstanding Service Recognition (250+ hours of service)
- Dean's List 2013-2014
- CALI Award – Criminal Externship Seminar – Fall 2013
- Content Development Director, Seattle Journal of Environmental Law

**University of Washington, Seattle**: B.A. in Sociology with Honors and Political Science, June 2010

## WORK EXPERIENCE:

**Partner – Heyman Schueler Rain, PLLC.**
Seattle, WA – January 2025 - Present
- General criminal defense and criminal appellate practice handling misdemeanors through felony representation in courts throughout Washington state.
- Post Conviction *Padilla* representation with Seattle Clemency Project.
- Member of the 2025 Federal Defender of Western District of Washington CJA Mentorship Program
- Provide conflict Public Defense services for:
  - Snohomish County
  - Island County
  - City of Kirkland Municipal Court
  - City of Woodinville Municipal Court

**King County Department of Public Defense – Associated Counsel for the Accused Division**
Seattle, WA – May 2016 - January 2025
- July 2024 – January 2025 – Supervised the South Felony Unit for ACAD along with another supervisor. In this role, I supervised three lawyers while carrying a mostly full caseload of all levels of felony cases up to and including homicides. I worked with the new attorneys to the unit to help acclimate them to felony practice, including providing training on scoring, different legal defenses, and how best to work up a criminal case. I have also provided training to all of DPD's new felony lawyers about alternatives to secure confinement at our Felony Core Skills training as well as provided training to our new lawyers in our New Lawyer Core Skills training.
- June 2022 – June 2024 MAPP - Along with supervising the Seattle Municipal Court Unit, I served as the MAPP, a position in which I worked closely with our Managing Attorney on a variety of operations issues at ACAD, including tracking training requests and budget, evaluations, attorney certifications, implementing policy changes, consulting on a variety of issues that arise internally and externally, and stood in as acting managing attorney when the Managing Attorney was out of office or on leave.
- July 2021-July 2024 – I supervised the Seattle Municipal Court Unit at ACA where I managed a team of 11 lawyers, along with a second supervisor. I worked with my co-supervisor and Managing Attorney to create training materials to be used by new lawyers focusing on trial skills and client communication skills. I also led the small group units for our new lawyer 'Core Skills' program. I acted as mentor/trainer on a variety of litigation issues and a resource for all stages of representation, from initial contact through sentencing and post-conviction issues. I evaluated potential conflicts of interest, resolve issues within the unit, and work with the ACA and Director's Office management team on larger systems/systemic issues.
- I previously represented a full caseload of clients in superior court ranging from class C to class A felonies including multiple third strike, homicide, and sex offense cases.
- Previously represented clients in district court with an emphasis on domestic violence cases.
- Presented on GR 37 and *Batson* issues to South District Court Unit and Seattle Municipal Court Unit in spring and summer 2021.
- On interview team for 2019 summer Rule 9 interns.
- Small group leader for 2021 ACAD summer intern training.
- Small group leader for 2021 ACAD Core Skills trial training.

**Pro Bono Counsel, *City of Seattle v. Erickson*, 188 Wn.2d 721, 398 P.3d 1124 (2017)**
Kent, WA – November 2014-July 2017
- Successfully litigated a *Batson* challenge from the RALJ court through the Court of Appeals, Division I, and to the Washington Supreme Court resulting in a bright-line rule for when the last venire person who shares a protected class status with the defendant is stricken with a peremptory challenge.

**Public Defender, Cowlitz County Office of Public Defense**
Longview, WA – December 2014 – May 2016
- Represented a full caseload of clients in district court, superior court, and juvenile court through first appearance, arraignment, pretrial motions, jury and bench trials, post-trial motions, RALJ appeals, and motions for discretionary review to the Court of Appeals, Division 2.

**Volunteer Attorney, Associated Counsel for the Accused – King County Department of Public Defense**
Kent, WA – September 2014 – November 2014
- Volunteered with misdemeanor and felony units to help with research and writing including briefing on litigating a loss of juvenile jurisdiction where the state failed to adequately serve the defendant.

**Rule 9 Legal Intern, Right to Counsel Clinic**
Seattle, WA – January 2014-September 2014
- Wrote sections of a motion for discretionary review on prosecutorial misconduct and ineffective assistance of counsel.
- Successfully wrote and argued sections of a RALJ appeal focusing on numerous violations of my client's due process rights.

**Rule 9 Legal Intern, The Defender Association – King County Department of Public Defense, Felony Division**
Seattle, WA – August 2013-December 2013
- Co-counsel in a felony organized retail theft trial.
- Drafted numerous motions in support of trial team including a CrR 3.6 brief in an Unlawful Possession of a Firearm in the Second Degree case.

**Rule 9 Legal Intern, Associated Counsel for the Accused – King County Department of Public Defense, Felony Division**
Kent, WA – May 2013-September 2013
- Successfully briefed and argued a severance motion severing one count of forgery from one count of second degree theft.
- Drafted a CrR 3.6 motion in a triple homicide case.
- Represented clients weekly in Drug Court.

**Student Extern, Federal Public Defender for the Western District of Washington**
Seattle, WA – August 2012-December 2012
- Conducted research and wrote memos regarding Fourth and Fifth Amendment violations by Seattle police, statutory interpretation of felon in possession of a firearm offenses, and sentencing issues pertaining to complex credit card fraud cases.
- Researched and drafted Appellant's Opening Brief in *United States v. Martinez-Mascareno*, 530 Fed. Appx. 667 (9th Cir. 2013).

**Student Fellow, Washington State Bar Association Moderate Means Program**
Seattle, WA – February 2012-May 2013
- Responsible for screening clients and conducting intakes for civil cases, particularly family law and landlord-tenant issues.
- Conducted legal research and wrote memos summarizing the issues, the law, and the likely outcome of the case.

**PROFESSIONAL ASSOCIATIONS:**
**Council on Public Defense – Washington State Bar Association**
Seattle, WA – 2025- present
- Member

**Washington Defender Association (WDA)**
Seattle, WA – 2014-Present
- Board of Governors Member 2025 – present

**Washington Association of Criminal Defense Lawyers (WACDL)**
Seattle, WA – 2014-Present
- Current Case Law Committee Member
- Current Amicus Committee Member
- Past Public Defense Committee Member
- Past Publications Advisory Board Member

**Duke Law School Inclusive Juries Project**
Durham, NC – 2024-Present
- Member of Advisory Board
- Provided Washington case law summary and overview of implementation of GR 37 in June 2024 meeting and conference

**National Lawyers Guild – Seattle Chapter**
Seattle, WA – 2014-Present
- Past Vice President through of August 2020

**SPEAKING ENGAGEMENTS:**
***Putting the RPCs and New Indigent Defense Standards to Work in Your Case***
- 2025 WDA Ethics Conference

***Object Anyway***
- 2025 WDA Annual Conference

***Preparing Witnesses and Issues with Expert and Hostile Witnesses***
- 2025 WSBA Trial Advocacy Program

***GR 37 Panel Discussions – A view from the Podium***
- 2023 Superior Court Judge's Spring Conference
- 2024 Appellate Spring Conference

***Tackling Bias in Jury Selection: Putting GR 37 to Work***
- 2022 WDA Ethics Conference
    - Moderator of panel discussion

***Better Than Batson: Using new GR 37 in Jury Selection***
- King County Department of Public Defense Harmony Conference
    - September 7, 2018
- Washington Defender Association Annual Conference
    - April 27, 2019
- Kitsap County Bar Association Annual CLE
    - October 12, 2019

**AWARDS:**
- 2023 Anthony Savage Award
    - Presented by the Washington Association of Criminal Defense Lawyers for outstanding trial performance or result achieved by an attorney in practice less than ten years.

**VOLUNTEER WORK:**
Seattle, WA – 2017-Present
- Mentor law students from Seattle University School of Law who are interested in careers in criminal defense, focusing on those interested in Public Defense.

**PUBLICATION:**
- *A Sinking Feeling: The Problem of Abandoned Boats in Washington Waterways*, 4 Seattle J. Envtl. L 215 (2014).

**MICHAEL A. SCHUELER**
901 FIFTH AVENUE, SUITE 2800C, SEATTLE, WA 98164
(425) 736-8506 | MICHAEL@HSR-LAW.COM

June 4, 2026

Washington State Bar Association President-Elect Kari Petrasek
Via Email – barleaders@wsba.org

Dear President-Elect Petrasek:

I am seeking appointment as Chair-Elect of the Washington State Bar Association's Council on Public Defense (CPD). Over the past year as a CPD member, I have been honored to contribute to efforts to improve public defense services statewide and to support implementation of the WSBA Standards for Indigent Defense. I am eager to take on a leadership role to continue this work, and I believe my experience as a public defender in both major metropolitan and rural communities—as well as my current work as a conflict public defender—makes me an excellent fit for this position. I have built strong relationships across the public defense community and hope to leverage those connections to benefit all Washingtonians.

Public defense has been the through-line of my career. From my Rule 9 internships with the Associated Counsel for the Accused Division (ACAD) and The Defender Association, to my first attorney role with the Cowlitz County Office of Public Defense, to nearly a decade with the King County Department of Public Defense, and now my work as a contractor, I have always taken pride in being a public defender. My practice has taken me through rural courts, municipal courts, juvenile courts, district courts, superior courts, and appellate courts.

These experiences have given me a firsthand understanding of how indigent defense is delivered differently across Washington and how agencies address the challenges line defenders face every day. I am acutely aware of how policy decisions—particularly around caseload standards—affect defender morale and contribute to the attrition crisis facing public defense statewide. This perspective will help me advocate effectively for policy changes that support high-quality, sustainable public defense services.

In addition, the last four years of my indigent defense practice were deeply focused on training, mentorship, and policy implementation to strengthen public defense in King County. In my most recent roles at ACAD, I supervised the Seattle Municipal Court Unit—where the majority of ACAD attorneys begin—and later supervised new felony attorneys in the Kent Felony Unit. In these positions, I developed training, provided in- and out-of-court mentorship, and helped new lawyers find their voice so they could zealously advocate for their clients. These experiences shape how I approach CPD's work: with a commitment to developing new defender talent statewide and ensuring that all clients receive effective representation.

I welcome the opportunity to discuss how my experience as a public defender in Washington will guide my service to the CPD. I look forward to continuing the work of strengthening public defense and helping ensure that Washington's indigent defense system is the best it can be.

Sincerely,

Michael A. Schueler

# CARNEY & MARCHI, P.S.
## ATTORNEYS AT LAW

**ATTORNEYS**

**NICHOLAS MARCHI**
**MICHELE CARNEY***

****Also admitted in Texas.***

**1809 7th AVE, STE 1110**
**SEATTLE, WA, 98101**
**(mailing) 300 LENORA ST, STE 146**
**SEATTLE, WASHINGTON 98121**
**TELEPHONE: (206) 224-0909**
**FACSIMILE: (206) 467-1819**
**WEBSITE: WWW.CARMARLAW.COM**

**7502 WEST DESCHUTES PLACE**
**KENNEWICK, WASHINGTON 99336**
**TELEPHONE: (509) 545-1055**

Date: May 14, 2026
Via Email: **barleaders@wsba.org**

To Whom it May Concern:

I am applying for the Chair position for the Committee on Professional Ethics. I am currently serving as a member of this committee.

My resume is submitted with this application. I have extensive experience serving as Chair for various boards and committees. I have served as Chair of the WSBA Disciplinary Board, AILA National Ethics Committee and AILA National Innovation and Technology Committee.

I have a keen interest in the intersection of ethics and technology. I frequently have spoken at national and international conferences on both ethics and legal technology. In addition, I have written several articles on ethics – particularly those facing immigration lawyers.

My law practice focuses on immigration law and has also pivoted to ethics consultations.

It is my belief that I have the skill, interest and patience necessary to lead a committee focusing on ethical issues facing the legal community.

My resume has detailed information as to my credentials. Thank you for your consideration.

Sincerely,
*Michele Carney (e-signature)*
Michele Carney
CARNEY & MARCHI, PS

# MICHELE CARNEY

Carney & Marchi, P.S. • 1809 7th Avenue, Suite 1110, Seattle, WA 98101 • (206) 224-0909 • mcarney@carmarlaw.com

## PROFESSIONAL PROFILE

Seattle-based attorney with more than thirty years of practice in immigration and nationality law and a national reputation in legal ethics, professional responsibility, and the intersection of law, technology, and innovation. Founding partner of Carney & Marchi, P.S. and an experienced board chair, committee chair, and faculty member. Frequent author and lecturer on legal ethics, AI, and the future of law practice – especially how they relate to immigration lawyers.

## LEADERSHIP HIGHLIGHTS

- Chair, Washington State Bar Association Disciplinary Board (2016–2017); Vice-Chair (2015–2016)
- Chair, AILA National Ethics Committee (2021–2023)
- Chair, AILA National Innovation and Technology Committee (2023–2025)
- Past Chair, AILA Washington Chapter (2013-2014)

## PROFESSIONAL EXPERIENCE

**Carney & Marchi, P.S.** *Seattle, Washington*

*Founding Partner | 1993 – Present*

Practice focused on immigration and nationality law as well as providing consultations to those facing ethical issues.

## PROFESSIONAL LEADERSHIP & SERVICE

**Washington State Bar Association**

| | |
|---|---|
| Committee on Professional Ethics | *Current* |
| Adjunct Disciplinary Counsel Panel | *Current* |
| Character and Fitness Board | *2021 – 2024* |
| Practice of Law Board | *2015 – 2021* |
| **Chair, Disciplinary Board** | *2016 – 2017* |
| **Vice-Chair, Disciplinary Board** | *2015 – 2016* |
| Disciplinary Board | *2014 – 2017* |
| Adjunct Disciplinary Counsel Panel | *1996 – 2004* |
| Board of Law Examiners | *1994 – 1996; 2000 – 2002* |
| Law Office Management Assistance Program Committee | *2001 – 2011* |

**American Immigration Lawyers Association (AILA)**

| | |
|---|---|
| Board of Editors, AILA Law Journal | *2025 – Present* |
| Member, National Ethics Committee | *2025 – Present* |
| Future of Law Committee | *2025 – Present* |
| **Chair, National Innovation and Technology Committee** | *2023 – 2025* |
| **Chair, National Ethics Committee** | *2021 – 2023* |
| Lead, Ethics Compendium Subcommittee | *2018 – 2021* |
| Lead, Innovation & Technology Government Relations Subcommittee | *2022 – 2023* |
| National Innovation Technology Summit Committee | *2019 – 2020* |
| Faculty, AILA University Online Tutorials | *2019* |
| National Annual Conference Committee | *2016* |
| National Fall Conference Committee | *2014* |
| Regional Immigration Conference Committee | *2015, 2016* |
| Regional Annual Conference Committee | *2015* |

**AILA Washington Chapter Chair**

*2013-2014*

## SELECTED SPEAKING ENGAGEMENTS & FACULTY APPOINTMENTS

Frequent national and international speaker on legal ethics, generative AI, technology adoption, and immigration practice. Recent and representative engagements include:

- *Future of Law Report* — AILA National Roundtable, April 2026
- *Immigration Law and Ethics* — International Bar Association Webinar, December 2025
- *Ethics of AI* — AILA New England Chapter Conference, Boston, November 2025
- *Paying Filing Fees Electronically Without Violating Trust Account Regulations* — AILA Washington Annual Ethics CLE, November 2025
- *Custom GPTs* — AILA National Online Course, October 2025
- *Ethics of AI and Business Immigration* — AILA NW Regional Law Conference, Seattle, October 2025
- *Ethics of Wellness* — AILA NW Regional Law Conference, Seattle, October 2025
- *Panel on AI and Regulation* — TILE Innovation and Technology Conference, Seattle University School of Law, June 2025
- *Reasonableness of Fees When Using AI: Navigating ABA Formal Opinion 512* — American Bar Association, February 2025
- *Electronic Filing for Family and Humanitarian-Based Cases* — AILA National Course, January 2025
- *Generative AI Advances for Lawyers* — AILA Utah Chapter, April 2024
- *Ethical Change Management: Implementing Technology for an Efficient Law Practice* — Philadelphia, PA, April 2024
- *Is There Common Ground?* — AILA Rome District Chapter, Amsterdam, March 2024
- *Hot Topics in Ethics* — AILA Washington Chapter, December 2023
- *GAI and Ethics* — AILA Carolinas Chapter, November 2023
- *Ethical Use of AI in Your Practice* — AILA Technology Summit, San Francisco, October 2023
- *Using AI in Your Practice* — AILA National Roundtable, July 2023
- *Ethics of GPT-4 and Beyond* — AILA National Roundtable, April 2023
- *Calmly Navigating the Treacherous Waters of Lozada and IAC Complaints* — AILA National Conference, New York, June 2022
- *Fiery Ethical Issues in Removal Proceedings* — AILA Fall Conference, Maui, September 2022
- *Reimagining Your Practice in a Changing World* — AILA Innovation and Technology Summit, December 2021

*Additional faculty appearances for the AILA Washington Chapter, AILA Chicago Chapter, AILA Texas Chapter, AILA Santa Clara Chapter, AILA Upper Midwest Regional CLE, WSBA, and AILA University. Complete list available on request.*

## SELECTED PUBLICATIONS

- *Futures Report (Task Force Member)* — American Immigration Lawyers Association, April 2026
- *The Mystery of Blockchain Technology for Immigration Lawyers* — American Bar Association, September 2025
- *Recent Enforcement Measures in Removal Defense: Ethically Navigating the New Landscape* — AILA, September 2025
- *The Justice Gap and Immigration Law* — Co-author, AILA Law Journal, May 2025
- *As Attorneys Adopt Generative AI, Three Elements Should Be Cardinal* — Co-author, Law360, March 2025
- *Getting Real About USCIS Technology and Us* — AILA, March 2024
- *How to Navigate Legal Fees in Unpredictable Removal Cases* — AILA, March 2024
- *EOIR's New Limited Practice Professional Conduct Rule: Ethical and Practical Implications* — AILA, March 2023
- *Guidance on Refunds of Flat Fees Under Prosecutorial Discretion Relief* — AILA, May 2022
- *Think Immigration: How Legal Ethics Has Evolved in Immigration Practice* — AILA, May 2022
- *Bite-Sized Ethics: Simple Tips for Avoiding a Disciplinary Complaint in Immigration Court* — AILA, April 2022
- *Ethical Duties for Prosecutorial Discretion Requests* — AILA, September 2021
- *The Ethics of Engaging Freelance Paralegals in the Practice of Immigration Law* — AILA, April 2021
- *Taking the Measure of Lozada* — AILA, April 2021
- *Mastering the Myriad Challenges of Immigration Court* — AILA, October 2020
- *Immigration Lawyers Guide to Delivering Online Legal Services* — AILA, 2020
- Contributing Author, *AILA Ethics Compendium on Immigration Law* — chapters on ABA Model Rules 1.4 (Communication), 1.5 (Fees), 1.16 (Declining and Terminating Representation), and 3.3 (Candor Towards the Tribunal), 2014 – 2020.

## BAR ADMISSIONS

- Washington State Bar Association
- State Bar of Texas
- U.S. District Court for the Eastern and Western Districts of Washington
- United States Court of Appeals for the Ninth Circuit

## EDUCATION

**Southern Methodist University School of Law** *Dallas, Texas*

Juris Doctor, May 1991

**McGill University** *Montreal, Quebec, Canada*

Bachelor of Arts, Political Theory, 1984

## PRO BONO & PUBLIC SERVICE

- (current) Vice-Chair, AILA Washington Rapid Response Committee
- (past) CARA Project Volunteer Attorney — represented detained women and children from Central America at the Family Residential Detention Center in Dilley, Texas.
- (past) Volunteer for OneAmerica Citizenship Day and AILA Washington detained-case projects at the Northwest Detention Center, Tacoma.

**Andrew Y. Yi**
[redacted]; [redacted]

## EDUCATION

**VANDERBILT UNIVERSITY LAW SCHOOL,** NASHVILLE, TN
Doctor of Jurisprudence, December 2011
***Honors and Activities:*** Thomas H. Malone Inn of Phi Delta Phi (International Legal Honors and Ethics Fraternity); Vanderbilt-Meharry Interdisciplinary Case Competition

**NEW YORK UNIVERSITY,** NEW YORK, NY
B.A., Economics (Minor: Mathematics), *magna cum laude*, May 2008
***Honors and Activities:*** Phi Beta Kappa; Dean's List (all semesters); Red Dragon Society; New York University Founders Day Award (awarded to undergraduates graduating in the top 10% of their class); New York University Honors Scholar

## PROFESSIONAL EXPERIENCE

**KING COUNTY PROSECUTING ATTORNEY'S OFFICE,** SEATTLE, WA (APRIL 2025 - PRESENT)
***Senior Deputy Prosecuting Attorney***

**SEATTLE UNIVERSITY SCHOOL OF LAW,** SEATTLE, WA (SUMMER 2025 TERM)
***Adjunct Professor of Law***

**PIERCE COUNTY PROSECUTING ATTORNEY'S OFFICE,** TACOMA, WA (JUNE 2021 – APRIL 2025)
***Deputy Prosecuting Attorney***

**THURSTON COUNTY OFFICE OF PUBLIC DEFENSE,** OLYMPIA, WA (AUGUST 2014 – MAY 2021)
***Defense Attorney***

**PIERCE COUNTY DEPARTMENT OF ASSIGNED COUNSEL,** TACOMA, WA (JANUARY 2014 – AUGUST 2014)
***Defense Attorney***

**THE LAW OFFICES OF KRUPA & CLARK, P.S.,** TACOMA, WA (FALL 2012-WINTER 2013)
***Associate Attorney***

**PIERCE COUNTY PROSECUTING ATTORNEY'S OFFICE,** TACOMA, WA (SPRING 2012 – FALL 2012)
***Deputy Prosecuting Attorney***

## JUDGE PRO TEMPORE EXPERIENCE

**SAN JUAN COUNTY DISTRICT COURT,** FRIDAY HARBOR, WA (OCTOBER 2024 - PRESENT)

**LEWIS COUNTY SUPERIOR COURT,** FRIDAY HARBOR, WA (AUGUST 2024 - PRESENT)

**SAN JUAN COUNTY SUPERIOR COURT,** FRIDAY HARBOR, WA (NOVEMBER 2024 ANTICIPATED START - PRESENT)

**THURSTON COUNTY DISTRICT COURT,** OLYMPIA, WA (AUGUST 2021 - PRESENT)

**LAKEWOOD MUNICIPAL COURT,** LAKEWOOD, WA (AUGUST 2021 - PRESENT)

**OLYMPIA MUNICIPAL COURT,** OLYMPIA, WA (AUGUST 2021 - PRESENT)

## PRESENTATIONS

Fall 2022 – Presented as part of a panel to help train the New Jersey judiciary, defense, and prosecution bars on attorney-conducted voir dire and educating on Washington's GR 37 Rule regarding the use of peremptory strikes in jury selection

Spring 2017 - "A Career in Law - Perspectives from a Public Defender" at Curtis High School in University Place, Washington presented to Elizabeth Corbishley's class at Curtis High School in University Place, Washington

Spring 2016 - "A Career in Law - Perspectives from a Public Defender" presented to Elizabeth Corbishley's class at Curtis High School in University Place, Washington

October 2013 - "Anatomy of a Malpractice Suit" (approved for 1 Washington MCLE credit) presented to the Honorable Robert J. Bryan Inns of Court in Tacoma, Washington

## COMMUNITY SERVICE

Washington State Access to Justice Board (OCTOBER 2024 – PRESENT) Appointed by the Washington Supreme Court for a three-year term starting October 1, 2024. The Board coordinated civil legal aid efforts around the state with a particular focus on race-based equity.

Washington State Bar Association Court Rules and Procedures Committee Board: Chair of the Subcommittee Studying Proposed Changes to the Rules of Appellate Procedure (OCTOBER 2024 – PRESENT) Appointed by the Washington State Bar Association for a two-year term starting October 1, 2024. Studied and analyzed proposed new court rules and amendments as requested by the Supreme Court.

University of Washington – Tacoma: Advisory Board Member of the Legal Pathways Program (FEBRUARY 2025 – PRESENT) Serve on the advisory board for the UW – Tacoma's Legal Pathways Program, designed to serve as a pipeline from college to law school for first-generation college students and students of color.

Korean-American Bar Association of Washington: Board of Directors (JANUARY 2025 – PRESENT)

Board Member and Volunteer Ambassador - Climbers of Color (JULY 2018 – JULY 2023) (a non-profit dedicated to increasing diversity in the climbing, mountaineering, and skiing communities by developing leaders of color) from 2017 to Present

Board member – A Step Ahead in Pierce County (2012 - 2016) (a non-profit serving developmentally disabled children) from 2012 to 2016

Board member – Puget Sound Chapter of the MS Society (2014 - 2017)

Clover Park Community College Career and Technical Education Advisory Board (2015 - 2017)

University Place School District Career and Technical Education Advisory Board (2013 - 2015)

## BAR ADMISSIONS

Washington State Courts; United States District Court for the Western District of Washington; United States Court of Appeals for the Ninth Circuit

## ASSOCIATIONS

Graduate of the 2024 National Judicial College's Course for Aspiring Judges (sole recipient of a full tuition scholarship from the National Asian Pacific Bar Association)

Graduate of the 2024 Washington State Judicial Institute Clinic (a non-profit dedicated to the appointment and election of people of color, LGBTQ+ persons, and women to the bench)

Korean Prosecutors Association (OCTOBER 2024 – PRESENT)

National Asian Pacific Bar American Bar Association (JULY 2024 – PRESENT)

American Bar Association (#06121462) – Judicial Division Appellate Judges Conference Member (JUNE 2024 – PRESENT)

Korean-American Bar Association of Washington (OCTOBER 2024 – PRESENT)

Tacoma-Pierce County Bar Association (MAY 2012 – SEPTEMBER 2014; JUNE 2024 – PRESENT)

The Appellate Project (MAY 2024 – PRESENT) – a non-profit organization empowering students of color to thrive in the appellate field by providing mentorship

WWW.GLGPLLC.COM
GALLOWAY LAW GROUP, PLLC.

Wednesday, June 10, 2026
Sent Via: Email

Law Clerk Program
Washington State Bar Association
1325 Fourth Ave. Ste. 600
Seattle WA 98101

Re: Statement of Interest – Chair of Law Clerk Board

Greetings:

I am pleased to submit my name for consideration as Chair of the APR 6 Law Clerk Board.

My service on the Board over the past couple of years has enhanced my strong appreciation for the important role the Law Clerk Program plays in Washington's legal profession. As a former clerk, I am committed to the continued development and growth of this meaningful alternative path to licensure.

As a Board member, I have valued the opportunity to work collaboratively with fellow members and WSBA staff in carrying out the Board's responsibilities. Those experiences have reinforced my commitment to fair, consistent, and thoughtful decision-making, as well as to supporting both law clerks and tutors throughout the program.

If selected as Chair, I would focus on fostering productive collaboration among Board members, ensuring efficient and well-organized Board operations, and promoting consistent application of the program's rules and standards. I would also work to support the continued success and visibility of the Law Clerk Program as an important pathway into the legal profession.

It would be an honor to serve as Chair and to continue contributing to the Board's mission of maintaining a rigorous, accessible, and respected program for future members of the Washington bar.

Thank you for your consideration.

Sincerely,

/s/ Sarah Y. Propst

Sarah Y. Propst, Attorney at Law

*ATTORNEYS*
**Edward Moore**
MOORE LAW PLLC

**Sarah Y. Propst**
ATTORNEY AT LAW

**Peter C. Rudolf**
RUDOLF LAW PLLC

**Adam T. Strand**
LAW OFFICES OF ADAM T STRAND PLLC

*STAFF*
**Shannon Gerlitz**
PARALEGAL/BILLING
SHANNON@GLGPLLC.COM

**Carmen LaClaire**
PARALEGAL
CARMEN@GLGPLLC.COM

**Erin Loftis**
PARALEGAL
ERIN@GLGPLLC.COM

**Nicole Robinson**
PARALEGAL
NICOLE@GLGPLLC.COM

**Lisa Ugalde-Soros**
PARALEGAL
LISA@GLGPLLC.COM

*Advocating for our neighbors with experience, compassion, and integrity.*

*Physical: [redacted] • Mailing: PO Box 425*
*Lake Stevens, Washington 98258*
*Telephone (425) 334-4400 • Facsimile (425) 334-2149*

# SARAH Y. PROPST

[redacted] / [redacted]

**Work Experience**

ATTORNEY AT LAW, *Galloway Law Group PLLC*, 8/2023 - Present

- Demonstrated knowledge of court environments and the justice system, including sources of law, court rules, and procedures for courts of limited jurisdiction
- Intimate understanding of separation of powers, intergovernmental and inter-organizational relationships, and case-flow management
- Regular and effective collaboration with judges, elected officials, and diverse groups, facilitating meetings and strategic teamwork
- Maintenance of strong working relationships with court personnel, administrators, law enforcement, and justice system partner agencies

LAW CLERK (Limited Law License), *Galloway Law Group PLLC*, 1/2021 - 8/2023

- Resolve complex, controversial issues through consensus building, mediation, and persuasive, patient communication
- Negotiate contracts and communicate effectively through writing, speaking, listening, and interpersonal relations
- Supervise and evaluate staff while promoting continual training and education

SENIOR PARALEGAL, *Galloway Law Group PLLC*, 3/2018 - 1/2021

- Manage and oversee multiple staff members; lead team building, personnel management, mentoring, and staff education initiatives, retaining and promoting multiple staff members from entry level to expert level
- Apply strategic thinking, priority setting, and critical decision-making to solve complex problems and develop firm policies

PARALEGAL, *Galloway Law Group PLLC,* 3/2017 - 3/2018

- Utilize information, telecommunications, and records management technology while enhancing customer service, public education, and media relations
- Respond sensitively to the needs of a diverse community with a service-oriented approach

**Education & Training**

- APR 6 LAW CLERK PROGRAM GRADUATE, Washington State Supreme Court
- Uniform Bar Examination Passed - Feb. 2023 (95th percentile nationwide in Real Estate)ADVANCED PARALEGAL CERTIFICATION (Associate in Arts), Edmonds College (American Bar Association Accredited)
- BACHELOR OF ARTS, University of Alabama
- **Certified Records Manager,** *ICRM*
- **Board Member**, *Washington State Bar Association Law Clerks Board*
- **Board Member**, *Sno-Isle Libraries Foundation*

Davis Wright Tremaine LLP

Suite 3300
920 Fifth Avenue
Seattle, WA 98104-1610

**Matthew D. LeMaster**
206.757.8077 tel
206.757.7700 fax

mattlemaster@dwt.com

June 3, 2025

Washington State Bar Association
Attn: Bar Leaders
1325 Fourth Avenue, Suite 600
Seattle, WA 98101-2539
barleaders@wsba.org

Re: Legislative Review Committee Chair Application

Dear Bar Leaders:

I am writing to express my interest in chairing the Legislative Review Committee (the "Committee") in 2025. I believe in the mission of the Committee and I believe I have the skill and energy to act as Chair.

I have been on the Committee since 2015. I have seen how the Committee carefully reviews and evaluates specific legislation from various sections of the WSBA. I have seen how the diversity of the backgrounds and practices of the members of the Committee has, on many occasions, fostered necessary and thoughtful feedback and facilitated the improvement of potential legislation.

I believe the Committee has a very important role. It is a process oriented Committee that compels the sections of the WSBA to pause and reflect on the intended and unintended consequences of legislation. The Committee benefits the WSBA's membership because of the Committee's rigorous review of potential legislation. As a result, legislation has a heightened level of credibility and an increased probability of passage.

The Committee's role is not uncontroversial. A number of members, each year ask "why does the Committee exist." I believe the answer is clear: to provide an additional and important "check" to make sure a broad array of voices are heard as legislation moves through the WSBA's processes.

If selected, I will do my best to work with Sanjay Walvekar to ensure everyone has a voice and the business of the Committee proceeds in an efficient manner. I worked closely with Mr.

Walvekar several years ago to cause the passage of important amendments to the Limited Liability Companies Act and the Limited Partnership Act. I really enjoyed working with Mr. Walvekar.

For the foregoing reasons, I would request that you thoughtfully evaluate my application. I have enclosed my CV. Please contact me with any questions.

Very truly yours,

Matthew D. LeMaster

cc: Sanjay Walvekar
sanjayw@wsba.org

Davis Wright Tremaine LLP

# Matt LeMaster (He/Him)

**PARTNER**


**Seattle**
**T** [redacted]
**F**

Chair, M&A Practice
Co-chair, Veteran Attorneys Affinity Group

**M** [redacted]
**E** mattlemaster@dwt.com


**Education**

J.D., University of Washington School of Law, 1997

B.S., University of Oregon, 1990

**Admitted to Practice**

Washington

Matt LeMaster is the chair of DWT's mergers and acquisitions practice. He focuses on business transactions, corporate governance, mergers and acquisitions, and finance. He has specific experience in media, technology, advanced manufacturing, distribution, senior living and hospitality.

Matt has been designated by Chambers USA as a leading lawyer (Band 3) in Corporate and Commercial law in Washington state.

Chambers reviewers noted his "quick response and concise answers in the midst of stressful negotiations" and his ability "to become part of the team and help solve problems to accomplish business goals."

In addition to his specific knowledge of transactions and mergers and acquisitions, Matt acts as principal outside counsel to Coast Hotels USA, Icom America Inc., Modjoul Inc., and Convoy Supply Inc. Matt is also an affiliate professor at the University of Washington School of Law, where he teaches a course on mergers and acquisitions.

Matt co-chairs DWT's veteran's affinity group, and helps manage equity partner compensation as a member of DWT's share committee.

## Practice Highlights

**Mergers & acquisitions**

Matt's core practice involves assisting his clients to achieve transformational business changes through mergers, acquisitions, financings, and other transactions.

**Outside general counsel**

Matt regularly assists significant ventures as outside general counsel who have daily legal requirements, but have no in-house counsel.

**Industry expertise**

Matt is deeply focused on media, technology, advanced manufacturing, distribution, senior living and hospitality industry verticals.

## Experience

## Media and Technology

### Acquisition of television stations

Assisted in acquisition from Cox Media of asset purchase of twelve television stations.

### Formation and financing of Modjoul, Inc.

Managed the formation, structuring, and financing of a robotics company.

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### Formation and financing of Visus Therapeutics, Inc.

Managed early stage formation and investment of eye therapeutics company.

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### Acquisition of i1Biometrics

Represented client in the acquisition of high-tech mouth guard sensing company.

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### Disposition of Implement.com

Represented client in the disposition of a cloud-based technology consulting company.

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### Sale of Blueview Technologies

Represented client in sale of sonar technology company.

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### Sale of business for Geospiza, Inc.

Represented Geospiza, Inc., a bioinformatics company, in its merger with PerkinElmer.

## Advanced Manufacturing and Distribution

### Acquisition of Valence Surface Technologies subsidiaries

Represented client in acquisition of advanced manufacturing businesses.

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### NxEdge Inc.

Represented company that specializes in machining, anodizing, coating, and cleaning of process components for semiconductor industry in auction and sale.

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### Acquisitions by Convoy Supply

Represented building products company in multiple asset acquisitions.

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### Acquisition of Granite Building Products, Inc.

Represented acquisition of stock of building products company.

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### Acquisition of Icom Canada

Represented Icom America, Inc. in acquisition of Canadian operations.

## Senior Living and Hospitality

### Management of legal affairs for Leisure Care

Represented Leisure Care and affiliates in the acquisition, financing, and negotiation of management agreements for multiple senior living facilities.

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### Acquisitions by Coast Hotels

Represented client in the acquisition of hotel facilities.

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### Disposition of hotel properties for The Peninsula Group

Represented client in the divestitures of multiple hotel facilities and follow-on acquisitions of replacement commercial properties.

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### Hotel management agreements and technical services agreements

Represented multiple clients in the drafting and implementation of long-term hotel management agreements, for owners and operators, including Red Lion Hotels Corporation and Coast Hotels.

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### Liquor licensing counsel

Provides liquor licensing counsel for multiple hotel and restaurant ownership groups including Red Lion Hotels Corporation and Coast Hotels.

---

### Gaming counsel

Represented Grant Thornton Limited in gambling licensing matters in receivership of Washington Gaming, Inc. and provided gaming counsel to Wells Fargo Gaming in connection with debt refinancing of a casino borrower.

## Memberships & Affiliations

- Co-Chair, 2021-present; Member, 2016-present – WSBA Partnership and LLC Law Committee
- Co-director, Global Business Law Institute, University of Washington School of Law, 2019-present
- Affiliate Professor, University of Washington School of Law, Mergers and Acquisitions A 534, 2019-present
- Seattle Rotary Club 4, Member, 2019-present
- Rotary Business Mentor, University of Washington, Foster Consulting and Business Development Center, 2022-present
- Leadership Council, University of Washington School of Law, Member, 2020-present
- Stewardship Committee, University of Washington School of Law, Member, 2020-present
- American Bar Association, M&A Committee, Member, 2020-present
- Advancement Committee, University of Washington School of Law, Member, 2019-2020
- University of Oregon School of Law, Mentor, 2021-present
- University of Washington School of Law, Mentor, 2019-present
- Leadership Council on Legal Diversity, Mentor, 2019-present
- Association for Corporate Growth, Member, 2015-present
- National Association of Corporate Directors, Member, 2018-present
- Law Firm Annual Challenge, University of Washington School of Law, Chair, 2018
- ALIS Planning Committee, Member, 2012-2018
- Mercer Island Youth Football Coach and Football Advisory Board, Director, 2011-2016
- Pacific Rim M&A Institute, Founder and Director, 2014-2016
- Northwest Education Fund, Director, 2015-2018
- Legislative Committee, Washington State Bar Association, Member, 2011-2016, 2020-present
- Childhaven, Director, 2010-2012
- Bellevue Rotary Club, Member, 2002-2010; Director, 2004-2007
- Business Law Section, Washington State Bar Association – Immediate Past Chair, 2009-2010; Chair, 2008-2009; Chair-Elect and Treasurer, 2007-2008; Chair, Mid-Year Meeting, June 2007; Vice Chair, 2006-2007; Recorder, 2005-2006; Co-chair, Publications Committee, 2002-2005
- Washington State Business Leaders Network, Director, 2006-2009

- Washington Attorneys Assisting Community Organizations (WAACO), Director, 2008-2009
- Hire America's Heroes, Director, 2007-2009
- American Bar Association, Committee on State and Local Bar Relations, Member, 2007-2010
- American Bar Association, Negotiated Acquisitions Committee, Member, 2006-2016
- Seattle University Directors Academy, Advisory Board, Director, 2007-2009
- King County Bar Association, Corporate/In-House Section, Co-Chair, 2003-2005
- King County Bar Association, Community Involvement Committee, Chair, 2002-2003
- King County Bar Association, Board of Trustees, Young Lawyer Division, Director, 2001-2002
- Advance Bellevue, Graduate, 2002

## Professional Recognition

- Named as one of "America's Leading Lawyers for Business" by Chambers USA in Corporate/Commercial Law (Washington), 2017-2022; Named a "Recognised Practitioner" in Corporate/Commercial Law (Washington), 2016; Leisure & Hospitality (Nationwide), 2019
- Named one of the "Best Lawyers in America" by Best Lawyers in Corporate Law, 2012-present; in Leisure and Hospitality Law, 2021-present
- Selected to "Washington Rising Stars" and "Washington Super Lawyers," Thomson Reuters
- Avvo Rating 10/10

## Background

- Captain, U.S. Army, Combat Engineer, obtained Airborne, Ranger, and German Badge for Military Proficiency qualifications; graduate of NATO Winter Long-Range Reconnaissance Patrol School
- Varsity Football, ROTC Cadet Battalion Commander, George C. Marshall Outstanding Cadet, Distinguished Military Graduate – University of Oregon
- Climbed "The Grand," Grand Tetons, 2019; completed the "Decalibron," climbed Mounts Democrat, Cameron, Lincoln, and Bross in one day, 2020; climbed the "Mountaineer's Route" on Mount Whitney, 2022

## Insights

Chambers USA Recognizes Davis Wright Tremaine for Leadership Across Key Industry Sectors and Honors the Firm for Excellence in 51 Practices, 06.05.23

Davis Wright Tremaine Advises INSP in the Purchase of TV Stations in 12 Markets from Cox Media Group, 08.01.22

Panelist, "M&A Financing and Market Update," Northwest Middle Market Growth Conference 2022, 07.14.22

Chambers USA Recognizes Davis Wright Tremaine for Excellence in Key Practice Areas and Industry-Leading Success With DEI, 06.07.22

"Veterans Day Conversation," Davis Wright Tremaine Webinar, 11.11.21

Davis Wright Tremaine Recognized by Chambers USA for Industry-Leading Excellence in Key Practice Areas, 05.21.21

Co-author, "Frequently Asked Questions and Current Trends in Representations and Warranties Insurance in Private M&A Deals," California Business Law Reporter, May 2021

Mentioned in "Global Business Law Institute Appoints New Chair, Members to Industry Advisory Board," University of Washington School of Law, 05.12.20

Davis Wright Tremaine Recognized by Chambers USA for Industry-Leading Excellence in Key Practice Areas, 04.28.20

Davis Wright Tremaine Recognized by Chambers as One of the Country’s Leading Law Firms for Business, 05.29.19

Addressing Homelessness Block by Block, 2018

Moderator, "Private Equity Investing in Aerospace and Defence Companies," Capital Roundtable, New York, N.Y., 09.13.18

# Ashley Cummins

[redacted], WA / acummins@seattleu.edu / [redacted]

## EDUCATION

**Seattle University** Seattle, Washington
*Master of Public Administration, focus in Nonprofit Leadership* Expected June 2028

**Gonzaga University School of Law** Spokane, Washington
*Juris Doctor* May 2017

**Washington State University** Pullman, Washington
*Bachelor of Arts, Major in Sociology and Minor in Political Science* May 2014
*Bachelor of Arts, Major in Criminal Justice* May 2014

## EXPERIENCE

**Seattle University School of Law** Seattle, Washington
*Associate Director, Access to Justice Institute (ATJI)* July 2024 – Present
- Directs institutional efforts to expand student participation in pro bono service, creating structured pathways that connect emerging lawyers with community-based legal needs
- Develops virtual and in-person programs to enhance student engagement with the legal profession, including career panels, mentorship programs, and networking events
- Executes pro bono service days and volunteer placements for students
- Cultivates cross-sector partnerships with bar associations and legal service providers, and community organizations to strengthen student engagement
- Aligns strategic planning and budget management with long-term goals

*Associate Director, ATJI & Center for Professional Development (CPD)* July 2023 – July 2024
- Collaborated with multiple departments in a dual role as an Associate Director of the Access to Justice Institute as well as the Center for Professional Development
- Organized social justice events, trainings, symposia, and networking opportunities
- Provided one on one counseling to students and alumni on career options, preparation of application materials, and job search and professional development processes

**Eastside Legal Assistance Program** Bellevue, Washington
*Housing Stability Program Attorney* November 2021 - July 2023
- Represented and advised low-income tenants with the goal of improving self-advocacy, retaining housing in pre-eviction matters, and upholding and asserting tenant's rights
- Drafted demand letters, pro se court pleadings, and settlement agreements and represented clients throughout the mediation process for rent-based evictions

- Recruited, trained, and supervised legal interns and Rule 9 interns throughout the year
- Identified and screened cases appropriate for pro bono placement, coordinating referrals to volunteer attorneys to expand service capacity

**Nevada Legal Services** Reno, Nevada
*Senior Attorney* October 2019 - April 2021
- Managed a full caseload while organizing and coordinating outreach efforts and drafted pro se materials across all four Nevada Legal Services' offices in Northern Nevada
- Represented clients in advanced and complex litigation matters
- Designed and delivered statewide CLE programs to recruit and train pro bono attorneys, serving as a mentor and ongoing resource to volunteer counsel
- Supervised a multi-disciplinary COVID-19 response task force of attorneys, legal interns, and social work interns to address emergent community legal needs

*Staff Attorney* October 2017 - October 2019
- Provided free representation ranging from counsel and advice to extended direct representation in eviction proceedings, subsidized housing terminations, administrative hearings on government benefit denials, and record sealing petitions
- Taught monthly educational presentations on a variety of legal topics to pro se litigants

## ADMISSION TO PRACTICE

Washington State Bar Association, *Member* October 2017 – Present
State Bar of Nevada, *Legal Services Member* November 2017 – April 2021

## LEADERSHIP

**American Bar Association** Chicago, Illinois (Remote)
*Legal Pathways and Law Student Outreach Vice Director* October 2025 – Present
**Washington Alpine Club** Seattle, Washington
*Vice President* November 2023 – Present
**Washington State Bar Association** Seattle, Washington
*Small Town and Rural Practice Council, Member* October 2023 - Present
**Washington Alpine Club** Seattle, Washington
*Board Member* November 2022 – October 2023
**State Bar of Nevada** Reno, Nevada
*Young Lawyer Section, CLE Northern Nevada Committee Chair* August 2019 – April 2021
**Washington State University Alumni Association** Reno, Nevada
*Sacramento Club Vice President* January 2019 – April 2021
**Washington State Bar Foundation** Seattle, Washington
*Board of Trustees, Student Trustee* May 2015 – September 2017

# Ashley Cummins

[redacted] / acummins@seattleu.edu / [redacted]


May 30, 2026
Via Email: barleaders@wsba.org

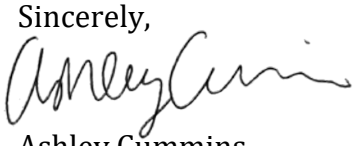
Dear President-Elect Petrasek,

Since joining the STAR Council in 2023, I have been inspired by STAR's commitment to strengthening rural practice and expanding access to justice throughout Washington. I am interested in serving as Chair because I believe my experience in civil legal aid, active involvement in STAR programming, and current work supporting the next generation of attorneys position me to help advance the Council's mission and support its continued success.

My commitment to STAR's work is rooted in both professional and personal experience. After graduating from law school, I relocated to Northern Nevada to work as a civil legal aid attorney serving communities affected by legal deserts, an experience that shaped my commitment to strengthening rural practice and access to justice. Over the past three years, I have taken active leadership roles in STAR programming, including the STAR Summit and Legal Lunchbox CLE series. Most recently, I co-chaired the 2026 Legal Lunchbox CLE, which drew more than 1,700 attendees and became the highest-attended program in STAR's history. I have also helped plan the STAR Summit for the past two years, bringing together stakeholders from across Washington to address challenges facing rural communities and identify practical solutions. My work at Seattle University School of Law also provides a unique perspective on attorney recruitment, retention, and barriers to rural practice.

Throughout my time on the Council, I have consistently volunteered to support STAR initiatives whenever needed and have valued the opportunity to collaborate with colleagues who share a commitment to rural communities. If selected, I would bring that same collaborative approach to the Chair position while building on the strong foundation STAR has established. Thank you for your consideration. I would be honored to serve as Chair and help advance STAR's mission throughout Washington.

Sincerely,



Ashley Cummins

Ariel Lynn Cook
[redacted] | arielcook@foxrothschild.com | [redacted] Seattle, WA [redacted]

May 31, 2026
Washington New Members Committee

Recommendations Subcommittee,

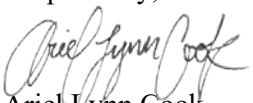
I am respectfully submitting my application for Chair of the Washington New Members Committee, and in the alternative, to be an At-Large member of the Committee. While I am proud of the contributions I've made as the Regional Representative for the Greater Olympia region in the year I have served in this role, I am resolved that I have more to contribute to the Committee and our New Member community.

When I joined the Committee in March 2025, my primary goal was to reinvigorate the Committee's online presence. I learned through student organization leadership during law school that social media is the most consistent and accessible medium of mass-communication, and I wanted to bring those insights to the Committee with the goal of amplifying the Committee's reach to New Members. Since my appointment, we have successfully launched a new LinkedIn page that reaches hundreds of members each month, regained control of the previously-abandoned Facebook page that boasts over 1.7 thousand followers, and developed a monthly content plan for both platforms.

However, much of this work remains incomplete. I struggled with health issues that disrupted my participation in Committee work in recent months, and as a result we have not yet achieved optimal consistency in our social media outreach. To realize the full potential of the Committee's online presence, we still need to pursue a regular content schedule, and we need to continue to seek innovative ways to engage New Members with our Committee, our programs and initiatives, and the community. While growing our connections with New Members both on-and-offline empowers the Committee to strengthen our community network and improve the accessibility of our programs, the qualitative analytics and quantitative insights available through social media bears valuable potential for the Committee's data-driven focus. Regardless of my position on the Committee, my application reflects my intention to continue to pursue these specific initiatives and the broader goals of the Committee to support New Members' professional development.

I have chosen to submit my application for Chair in addition to applying for At-Large Membership because I believe I can offer inclusive and dedicated leadership. As we have discussed, our Committee is building momentum. As I have demonstrated in my role so far, I want to be a part of that vital forward-force: to push our Committee's initiatives forward and expand our vision for what the Committee can offer New Members.

Respectfully,



Ariel Lynn Cook

# Ariel Lynn Cook

[redacted] | arielcook@foxrothschild.com | [redacted] Seattle WA [redacted]

## Education

**Seattle University School of Law** — **Seattle, WA**
*Juris Doctor Candidate* — May 2024
Rank/GPA: Top 10% | 3.8
Honors: Dean's Medal | Full Tuition Academic Honors Scholarship | Pro Bono Pledge Award | Order of the Barristers | CALI Excellence for the Future Awards in Persuasive Writing & Oral Advocacy, Evidence, Criminal Procedure, and Constitutional Law II
Scholarship: Independent Study: *Reproductive Rights in the Post*-Dobbs *Landscape* (2024)
Moot Court: ABA National Appellate Advocacy Competition: *Regional Champion* | American Association for Justice Student Trial Advocacy Competition: *Regional Champion* | James E. Bond Moot Court Competition: *1st Place* | Seattle University Motions Competition: *1st Place* | Seattle University Mock Trial Competition: *1st Place*
Leadership: Family Law Society: *President* | Advocacy Training Society: *President*

**University of Washington** — **Tacoma, WA**
*Bachelor of Arts in Law and Policy* — June 2021
GPA: 3.66
Honors: Dean's List (2021)
Scholarship: Politics, Philosophy, and Public Affairs Paper Prize for Capstone Essay: *Immigration Detention in the Trump Era: A Timeline and Analysis* (2021), published in the University of Washington Digital Commons (linked here)

## Professional Experience

**Fox Rothschild, LLP** — **Seattle, WA**
*Associate* — October 2025 - Present
- Drafting pleadings, conducting legal research, and presenting oral argument for litigation, state and local taxation, and appellate matters

**Washington State Supreme Court, Chambers of Justice Charles Johnson** — **Olympia, WA**
*Judicial Law Clerk* — August 2024 – August 2025
- Providing advice and analysis regarding pending appellate cases, drafting bench memoranda and opinions

**Fox Rothschild, LLP** — **Seattle, WA**
*Summer Associate* — May 2023 - August 2023
- Drafting pleadings and internal research memoranda for litigation in various practice areas

**Summit Law Group, PLLC** — **Seattle, WA**
*First-Year Summer Clerk* — May 2022 - August 2022
- Drafting pleadings and internal research memoranda for litigation in various practice areas

**The Moceri Law Group, PLLC** — **Tacoma, WA**
*Chief Operating Officer* — December 2020 - June 2021
- Managing firm operation policies and procedures, personnel, and office administration

*Paralegal* — March 2019 - September 2020
- Managing case dates and deadlines, drafting pleadings, and communicating with clients

*Administrative Assistant* — August 2018 - January 2019
- Managing firm calendars and acting as firm point-of-contact for clients

## Volunteer Experience

*Regional Competition Mock Trial Coach,* **Seattle University School of Law** — January 2025 - Present
*Volunteer Attorney,* **Entre Hermanos Immigration Department** — November 2023 - Present
*Volunteer Attorney,* **Northwest Immigrant Rights Project** — April 2025 - Present
*Volunteer Attorney,* **Kids in Need of Defense** — May 2025 - Present
*Committee Member,* **WSBA Washington New Members Committee** — April 2025 - Present

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**FROM:** Ethan Frenchman, Chair, WSBA Judicial Recommendation Committee; Sanjay Walvekar, Staff Liaison to the Judicial Recommendation Committee

**CC:** Terra Nevitt, Executive Director

**DATE:** June 25, 2026

**RE:** WSBA Judicial Recommendation Committee June 2026 Interviews and Recommendations

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

The WSBA Judicial Recommendation Committee met on June 25, 2026 for the purpose of conducting interviews with two individuals interested in being considered for openings on the Washington State Court of Appeals and the Washington Supreme Court. 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.

WASHINGTON STATE
BAR ASSOCIATION

**Office of General Counsel**
**Nicole Gustine, Assistant General Counsel**

**TO:** WSBA Board of Governors

**FROM:** Nicole Gustine, Assistant General Counsel

**DATE:** May 5, 2026

**RE:** Confidentiality of Client Protection Board Recommendations

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

> **APR 15**
> **CLIENT PROTECTION FUND PROCEDURAL REGULATIONS**
> **REGULATION 13. CONFIDENTIALITY**
>
> (a) Matters Which Are Public. On approved applications, the facts and circumstances which generated the loss, the Client Protection Board's recommendations to the Trustees with respect to payment of a claim, the amount of claim, the amount of loss as determined by the Client Protection Board, the name of the lawyer, LLLT, or LPO causing the loss, and the amount of payment authorized and made, shall be public.
>
> (b) Matters Which Are Not Public. The Client Protection Board's file, including the application and response, supporting documentation, and staff investigative report, and deliberations of any application; the name of the applicant, unless the applicant consents; and the name of the lawyer, LLLT, or LPO unless the lawyer, LLLT, or LPO consents or unless the lawyer's, LLLT's, or LPO's name is made public pursuant to these rules and regulations, shall not be public.

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

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

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

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**FROM:** Executive Director Terra Nevitt

**DATE:** June 24, 2026

**RE:** Executive Director's Report

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NextGen Exam Administration - July 2026

Regulatory Services staff are hard at work preparing for the first administration of the NextGen bar exam and it is shaping up to be a big one, with 804 examinees expected in Yakima on July 28 and 29. This exam brings an unprecedented 131 testing accommodation requests. This is the first time we have exceeded 100, which has required securing additional private testing rooms at the Holiday Inn as well as group testing rooms at the Convention Center. Because this is our first time administering the NextGen bar exam, planning has been more intensive than in past exam cycles as we navigate new processes and unknowns. The increased number of requests for accommodations has also expanded our staffing needs – we anticipate hiring 65 proctors and 28 WSBA staff members are expected to assist with exam administration. Despite the challenges, the team's adaptability and commitment continue to shine, leaving us confident and hopeful for a smooth and successful first NextGen bar exam. You can learn more about the NextGen Exam here. Washington is among the first group of states to administer the new exam, alongside our neighbors Oregon and Idaho.

Second Annual Bar Leaders' Summit - 'Together, We Raise the Bar'

We held our second annual WSBA Bar Leaders' Summit on Friday, May 15. The summit brings together county and affinity bar leaders from across Washington to strengthen connections, share practical strategies, and build the knowledge and skills needed to lead thriving, resilient bar organizations. The summit was held at the WSBA offices and there were 42 bar leaders in attendance. The feedback has been overwhelmingly positive.

Rule of Law Ambassador Program Updates: Take the Pledge!

Our Rule of Law Ambassador Program continues to be active providing programming to equip legal professionals to build trust and confidence in the legal system. More than 100 people registered for the Speak Up for Justice! event in Bellingham on May 18 and we also held a wonderful event in South Bend on June 5.

In May we also held our first Ambassador Cohort Training, which is intended to empower a cohort of legal professionals to *directly* facilitate conversations with community leaders to strengthen local democratic institutions and court systems. Eleven volunteers and 9 WSBA staff attended a two-day, immersive and high-engagement coaching session. The goal is to prepare each member of the cohort to hold a bridge-building, town-hall type event with leaders in their community sometime in the coming months. This will lay the foundation for a cohort-training model we plan to replicate and expand in coming years, supported by our own trained staff. We will share more about the outcomes of the cohort training as well as the dates of the bridge-building events as they are scheduled.

**Finally, on May 1, we called upon legal professionals to pledge to visit a classroom on Constitution Day, September 17, 2026. By bringing the Constitution and its day-to-day application to life for students across the state, the legal community can help to bridge civic divides and safeguard the future of our judiciary. This is an ideal year to launch what we hope will become an annual tradition in our community as we celebrate the 250th anniversary of the Declaration of Independence. This effort was launched with a press event at the Temple of Justice with Justices, and 50 to 100 legal professionals delivering goody baskets to schools across the state with materials promoting the Lawyer in the Classroom program. It is not too late to join this effort. Learn more and take the pledge here.**

Attachments
Q2 FY26 Fiscal Update Memo
Q1 FY26 Discipline Report
Outreach Report
Media Report
Member Demographics Report
Litigation Report (confidential)

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors
Budget and Audit Committee

From: Tiffany Lynch, Director of Finance

Subject: FY 2026 Second Quarter Financial Update

Date: April 29, 2026

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**GENERAL FUND**

The March 31, 2026 financials marks the end of the second quarter of fiscal year 2026. With 50% of the year complete, the General Fund is outperforming against budget with revenue ahead of budget, indirect expenses on target, and direct expenses under budget. The result is a net income of $1,273,835 without the use of Facilities or Special Projects and Innovation Fund reserves and $1,367,835 with the use of those reserves. Below is a narrative which highlights the areas of interest and estimates moving forward.

**REVENUE**

Total revenue is ahead of budget at 56% (+$1,402,082) which includes the following areas of note:

a. *Licensing Fees* are ahead of budget at 51% due to higher than anticipated late fees. Most license renewal fees were collected in January, with late fees following in February and March. The remaining revenue will be from new member licenses. WSBA is expected to meet or slightly exceed its budget by year-end.
b. *Bar Exam Fees* are ahead of budget at 86% (+$538,815) mainly due to timing of the collection of fees for the Summer 2026 exam, which typically concludes in May. Admission fees for other categories will remain in effect throughout the rest of the year, which is expected to help achieve the budget targets.
c. *Bar News Revenue* is ahead of budget at 60% (+$52,743), partly because revenue collection aligns with producing nine magazines annually and we have already released five year-to-date. Additionally, advertising revenue has exceeded expectations, so we expect to finish the year slightly over budget.
d. *Entity Regulation Annual Fees* are under budget at 20% (-$23,750). Applications opened for submission during the current fiscal year; however, as of March, no approvals have been granted. Given the volume of applications received to date, annual revenue is expected to be generated in the second half of the year, though it is projected to fall below the budgeted amount.
e. *Law Clerk Fees* are over budget at 114% (+$31,667). Program participants are able to enroll throughout the year and pay a prorated fee at the time of enrollment. Annual fees are paid by all individuals who remain enrolled between November and February, comprising the majority of revenue collected thus far. Only a minimal amount of fees is anticipated to be collected

during the rest of the year.

f. *Donations & Grants (Public Service Programs)* revenue under budget at 2% (-$63,679), however the full budget amount will be collected in April. These are funds raised by the Washington State Bar Foundation through licensing renewal to support WSBA programming.
g. *Reimbursement from Sections* is over budget for the year by $113,434 (+41%). This revenue is derived from the per-member charge that reimburses WSBA for the cost of administering Sections for the membership year (January-December). Because WSBA's membership year and fiscal year are different, three months of the reimbursement collected for October-December will be allocated to FY27 in September and we expect that this will bring revenue back in alignment with the budget.

**EXPENSES**

Total expenses are slightly under budget at 49% (-$330,404), which includes the following areas of note:

a. *Direct Expenses* are under budget by 8% (-$232,910). Direct program costs such as board/council/taskforce meetings, event expenses, supplies, staff travel, etc. vary depending on the timing of activities. We expect spending in these areas to pick up as we move into the second half of the fiscal year.
b. *Indirect Expenses* are on budget at 50% with minimal savings variance of $97,495.
    i. Salaries, Taxes, & Benefits combined are tracking ahead of budget at 51% (+$184,389). Salaries are currently over budget due to compensation grid changes and quarterly vacation accruals. Staff turnover in the second half should bring actual spending closer in line with the budget by year-end. Additionally, medical expenses are ahead of budget at 56% (+$102,047) due to higher than budgeted medical rate increases for the year.
    ii. Other Indirect Expenses are tracking under budget at 44% (-$281,885) mainly due to the timing of costs for legal fees, Computer Pooled Expenses (IT direct expenses), and workplace benefits. We anticipate that the majority of these expenses will be incurred in the second half of the year, with some limited savings.

**CONTINUING LEGAL EDUCATION (CLE)**

The CLE fund includes CLE Seminars, CLE Products, and Deskbook cost centers which collectively have budgeted a net loss requiring a use of reserves of ($131,482) for FY 2026. March 31, 2026 results reflect a net loss of ($77,829). Revenue is running under budget by ($78,353) (-5%) due to lower seminar registrations and timing of receipt of deskbook royalties. Expenses overall are under budget by ($66,266) (-4%), mostly due to timing of direct expenses that have not been incurred yet for seminars held later in the fiscal year.

**CLIENT PROTECTION FUND (CPF)**

The Client Protection Fund (CPF) budgeted a surplus of $244,100 for FY 2026. Actual results as of March 31, 2026 reflect a surplus of $704,573. Revenue is ahead of budget for the year at 87% (+$345,326), primarily from member assessments which are recognized upon collection during annual license renewals. Overall expenses are under budget at 16% (+$237,197) mainly from the timing of payment for Gifts to Injured Clients, the bulk of which is made at the end of the fiscal year.

**SECTIONS FUND**

The Sections Operations cost center represents the collective total of financial activity for all 29 sections. Sections budgeted a loss of ($437,806) for FY 2026. Actual results as of March 31, 2026 reflect a surplus of $135,921. Section Dues revenue and Reimbursement to WSBA for Indirect Expense costs are over budget because Sections collect the majority of their dues in January and February and similar to Reimbursement from Sections in the General Fund, one quarter of the dues and reimbursement expenses will be allocated to FY27 as a result of the difference between the membership year and fiscal year. Direct expenses of Section Activities are running slightly under budget at 47% (-$32,318). By March, most of the expenses for Sections are tied to per-member charge cost for administering Sections, which correspond to membership dues revenue. In the latter half of the year, it is anticipated that most expenses will shift towards program-related activities.

WASHINGTON STATE
BAR ASSOCIATION
Office of Disciplinary Counsel

MEMO

To: Terra Nevitt, WSBA Executive Director

From: Douglas J. Ende, WSBA Chief Disciplinary Counsel & Director of the Office of Disciplinary Counsel

Date: May 27, 2026

Re: Quarterly Discipline Report, 1st Quarter (January – March) 2026

## A. Introduction

The Washington Supreme Court's exclusive responsibility to administer the systems for discipline of licensed legal professionals (including disability systems) is delegated by court rule to WSBA. See GR 12.2(b)(6). Staff and volunteers carrying out the functions delegated by the Rules for Enforcement of Lawyer Conduct (ELC) act under the Supreme Court's authority. The investigative and prosecutorial function is discharged by the employees in the Office of Disciplinary Counsel (ODC), which is responsible for investigating allegations and evidence of professional misconduct and incapacity and prosecuting violations of the Washington Supreme Court's Rules of Professional Conduct.

The Quarterly Discipline Report provides a periodic, high-level overview of the functioning of the Office of Disciplinary Counsel. The report graphically depicts key discipline-system indicators for the 1st Quarter 2026. Note that all numbers and statistics herein are considered tentative/approximate. Final figures will be issued in the 2026 Discipline System Annual Report.

## B. REMINDER: Limitations on Governor/Officer Involvement in Discipline Matters

By rule, the Supreme Court has expressly restricted the involvement of Governors, Officers, and the Executive Director in investigative, prosecutorial, or adjudicative decisions in the discipline system. The BOG does not have right or responsibility to review or influence decisions or recommendations in individual discipline/disability cases. Rule for Enforcement of Lawyer Conduct (ELC) 2.2(b). Accordingly, the BOG does not adopt disciplinary policies that constrain or alter the discretion of disciplinary counsel or other constituents of the discipline system with respect to the handling of individual matters. Inquiries or complaints about the handling of particular grievances or cases (from licensed legal professionals or grievants) should immediately be referred to the Chief Disciplinary Counsel and/or WSBA General Counsel and should not be responded to directly. Current and former members of the Board of Governors, Executive Directors, and Officers cannot knowingly advise or represent individuals regarding pending or likely disciplinary grievances or proceedings. ELC 2.14.

## C. Summary of Disposition of Formal Matters[1]

**Public Dispositions**

**Disbarments (3):**

James Sinclair #52172
Joseph W. Kuhlman #42884
Stephen Kenneth Monro #26075

**Suspensions (4):**

Nichole Danelle Fisher #54253 (*Stipulation*) (30 Month Suspension)
Diana E. Moller #24707 (6 Month Suspension)
Andrew Michael Reeves #47116 (1 Year Suspension)
Timothy Ronald Richards #44812 (*Stipulation*) (8 Month Suspension)

**Reprimands (2):**

Matthew W. Anderson #43045 (*Stipulation*)
Alice Bagirova #49294 (*Stipulation*)

**Resignation in Lieu of Discipline (2):**

Hari L. Alipuria #26899
G. Christopher Ramsey #35358

**Reciprocal Discipline (4):**

Gregory Mark Abel #29268 (Suspension) (30 Days)
David L. Vicevich #45426 (Reprimand)
John David Du Wors #33987 (Disbarment)
Kerry P. Zeiler #56524 (Suspension) (3 Years stayed, 2 Years with Probation)

**Disability Found (1):**

Ernesto Jack Piza #31033

**Interim Suspensions (2):**

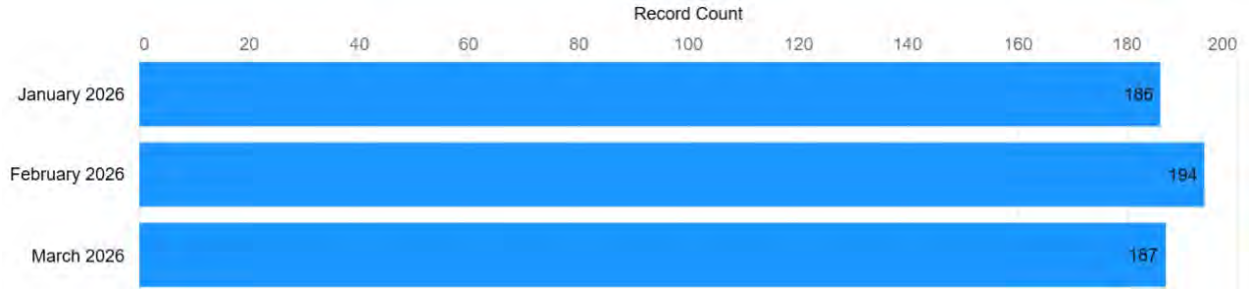
**Interim ELC 7.2: Interim Suspension in Other Circumstances**

Gerald T. Osborn #13712
Shannon Marie McMinimee #34471

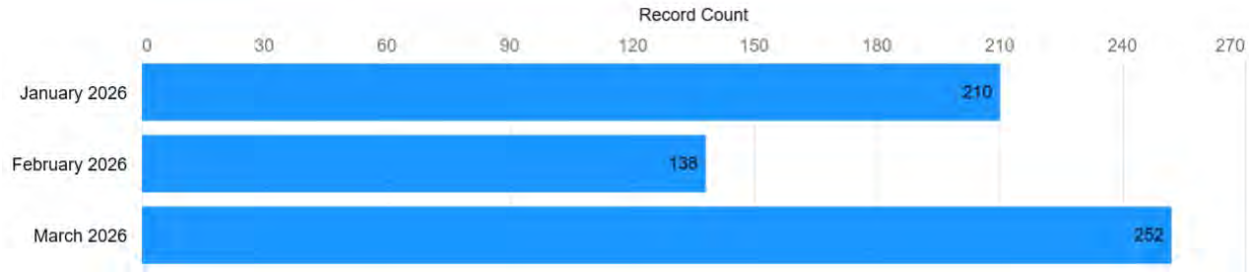
[1] Names in red font denote actions occurring in the current reporting quarter.

## D. Grievances and Dispositions[2]

| Number of Grievances Received | **2026 YTD: 567** |
|---|---|
| | 2025: 2,228 |




| Number of Grievances Resolved | **2026 YTD: 600** |
|---|---|
| | 2025: 1,895 |




Diversion Statistics

| | 1st Qtr | 2nd Qtr | 3rd Qtr | 4th Qtr | 2026 Total *(to date)* | 2025 Total |
|---|---|---|---|---|---|---|
| New Diversion Files | 2 | | | | 2 | 4 |
| Completed Diversion Files | 1 | | | | 1 | 4 |
| Terminated Diversion Files | 1 | | | | 1 | 0 |

[2] These figures may vary from subsequent quarterly reports and statistical summaries owing to limitations on data availability at the time of issuance of these quarterly reports.

Disciplinary Actions and Statistics

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | 2026 Total *(to date)* | 2025 Total |
|---|---|---|---|---|---|---|
| Formal Complaints Filed | 8 | | | | 8 | 27 |
| Reciprocal Discipline Files Opened | 2 | | | | 2 | 16 |
| Stipulations | 4 | | | | 4 | 17 |
| Hearings Held[3] | 8 | | | | 8 | 7 |
| Open Proceedings | 51 | | | | | |

Matters Acted on by Reviewing Bodies

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | 2026 Total *(to date)* | 2025 Total |
|---|---|---|---|---|---|---|
| Supreme Court | 12 | | | | 12 | 40 |
| Disciplinary Board | 14 | | | | 14 | 29 |
| Review Committee | 122 | | | | 122 | 408 |

## E. Final Disciplinary Actions

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | 2026 Total *(to date)* | 2025 Total |
|---|---|---|---|---|---|---|
| Disbarments | 4 | | | | 4 | 7 |
| Resignations in Lieu | 2 | | | | 2 | 6 |
| Suspensions | 6 | | | | 6 | 18 |
| Reprimands | 3 | | | | 3 | 11 |
| Admonitions | 0 | | | | 0 | 4 |
| Total | 15 | | | | 15 | 46 |

## F. Disability Found

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | 2026 Total *(to date)* | 2025 Total |
|---|---|---|---|---|---|---|
| Disability Found | 1 | | | | 1 | 5 |

[3] Includes default hearings.

## G. Discipline Costs Collected[4]

| Quarterly Discipline Costs Collected | Total |
|---|---|
| **1st Quarter** | $21,311 |
| **2nd Quarter** | TBD |
| **3rd Quarter** | TBD |
| **4th Quarter** | TBD |
| **2026 Total** | **$21,311** |
| 2025 Total | $40,7560 |

[4] The cost figures may vary from amounts indicated in previous quarterly reports, statistical summaries, and annual reports, owing to limitations on the data available at the time of issuance of these quarterly reports and the final cost figures available after WSBA Finance staff closes the monthly books.

WASHINGTON STATE BAR ASSOCIATION

**MEMO**

**To:** Board of Governors

**From:** Darlene Parker, Sr. Outreach Coordinator

**Date:** June 9, 2026

**Re:** Summary of Outreach, March 1, 2026 – May 31, 2026

Between March 2026 and May 2026, WSBA leaders and staff participated in numerous outreach activities across Washington's legal community, including affinity and county bar events, legal service organizations, community celebrations, and various CLE presentations.

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| Events and Presentations | | |
|---|---|---|
| **Affinity Bar and County Bar Associations** | | |
| **Date** | **Event Title** | **Bar Association** |
| March 7 | 33rd Annual Gala | Latino Bar Association of Washington |
| March 7 | Barrister's Ball | Clark County Bar Association of Washington |
| March 28 | Celebrating Judge Tam Bui: A Historic First | Vietnamese American Bar Association of Washington |
| April 1 | Professionalism Award Dinner | Spokane County Bar Association |
| April 23 | Brew Review | Unemployment Law Project |
| April 24 | 30th Birthday Celebration | TeamChild |
| May 5 | Breakfast with Champions | King County Bar Association |
| May 8 | Annual Meeting & Dinner | Thurston County Bar Association |
| May 8 | Annual Scholarship Dinner | Loren Miller Bar Association |
| May 15 | Spectacular Spectacular: A Fundraising Extravaganza | LGBTQIA+ Bar Association |
| **Other Legal Entities** | | |
| **Date** | **Event Title** | **Legal Entity** |
| May 15 | Annual Gala | Northwest Immigrant Rights Project |
| May 27 | Breakfast for Justice | Eastside Legal Assistance Program |
| **APEX in Community Celebrations** | | |
| **Date** | **Award/Honoree** | |
| March 1 | Outstanding Judge: LeRoy McCullough | |
| May 27 | Legal Innovation: AOC Blake Refund Bureau | |
| **Speak Up for Justice** | | |
| March 11 | Speak Up for Justice: Tacoma | |
| March 27 | Speak Up for Justice: Yakima | |
| April 10 | Speak Up for Justice: Spokane | |

| | | | |
|---|---|---|---|
| April 14 | Speak Up for Justice: Seattle | | |
| April 15 | Speak Up for Justice: Mount Vernon | | |
| April 24 | Speak Up for Justice: Olympia | | |
| May 18 | Speak Up for Justice: Bellingham | | |
| **Presentations and Panels** | | | |
| **Date** | **Title** | **Host** | **WSBA Presenter** |
| March 20 | Public Easements CLE - Ethics and AI | The Seminar Group | Jeanne Marie Clavere |
| March 30 | Lunch and Learn: Immigration Enforcement and the Fourth Amendment | WSBA | Terra Nevitt |
| March 31 | History of Admissions | UW Law School | Terra Nevitt |
| April 2 | Residential Evictions CLE - Common Ethical Dilemmas and an Overview of Recent Advisory Opinions | The Seminar Group | Jeanne Marie Clavere |
| April 2 | Lunch and Learn: First and Second Amendments and Immigration Enforcement | WSBA | Terra Nevitt |
| April 7 | Pupilage 6 - Ethics and the Movie "Legally Blonde" | Dwyer Inn of Court | Jeanne Marie Clavere |
| April 7 | Lunch and Learn: When Jurisdictions Collide | WSBA | Terra Nevitt |
| April 18 | NW Bankruptcy Institute - Legal Ethics and Online Lawyer Communications: Advertising, Listservs, Blogs, and Social Media Comments | OSB and WSBA Debtor Creditor Sections | Jeanne Marie Clavere |
| April 28 | Support Enforcement Annual Conference | WAPA | Sandra Schilling |
| April 29 | Municipal Attorneys – Common Ethical Dilemmas with Organizations | Muni/PUD | Sandra Schilling |
| April 29 | History of Admissions | University of Illinois Law School | Terra Nevitt |
| May 4 | Grounding in Washington's Strategic Guides & Current Environment | WSBA/ATJ Board | Renata Garcia, Terra Nevitt, Diana Singleton |
| May 5 | Common Ethical Issues in Litigation | Snohomish County Bar Association | Jeanne Marie Clavere |
| May 6 | Monthly CLE – Communication and Solicitation | Benton County Bar Association | Sandra Schilling |
| May 12 | Overview of WSBA's Ambassador Program | State Bar of New Mexico | Terra Nevitt |
| May 20 | Corporate Counsel Section – Ethics and AI | WSBA | Jeanne Marie Clavere |

| | | | |
|---|---|---|---|
| May 21 | ALPS – Ethics and AI | WSBA | Jeanne Marie Clavere |
| May 22 | Entity Regulation Roundtable | WSBA Solo and Small Practice Section | Renata Garcia and Terra Nevitt |
| May 26 | STAR Summit | Ellensburg – Kittitas County | Sandra Schilling |
| May 27 | Landlord Tenant Section – Communication and Solicitation | WSBA | Sandra Schilling |

WASHINGTON STATE BAR ASSOCIATION

**To:** Board of Governors

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

**Date:** June 15, 2026

**Re:** **Summary of Media Contacts**, April 21-June 15, 2026

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| Date | Journalist and Media Outlet | Inquiry |
|---|---|---|
| April 21 | Patrick Malone, Seattle Times | Questions about the Well-Being Task Force's final report. Interview set up with task force leaders. |
| April 28 | Rachel Rippetoe, Law360 | Questions about how the Entity Regulation Pilot Project is going in Washington, post launch. |
| May 1-June 15 | Nina Shapiro, Seattle Times | Asked about public discipline information for lawyer Alexandra Lozano; ongoing conversation about discipline case and resources for clients as events developed. |
| May 4 | Rachel Riley, Law360 | Questions about the Well-Being Task Force's final report. |
| May 12-June12 | Sharon Yoo, King 5 News | Asked about public discipline information for lawyer Alexandra Lozano; ongoing conversation about discipline case and resources for clients as events developed. |
| May 14 | Cara Bayles, Law360 | Questions about the WSBA's Character and Fitness application, especially the "civil action" section related to domestic violence survivors. Responded that this |

| | | |
|---|---|---|
| | | section is under consideration, but no changes have been made yet. |
| May 20 | Christine Charnosky, Law.com | Inquiry into amendments made to admissions rules, bylaws, and policies by the Board of Governors at the May meeting, specifically to constraints limiting admissions to graduates of ABA accredited law schools. |
| May 20 | Sam Skolnik, Bloomberg Law | Inquiring about any possible changes we are considering to RPC 1.14 (Clients with Diminished Capacity). |
| May 22 | Karen Sloan, Reuters | Inquiry for comment about bar exam eligibility. |
| May 27 | Isaias Alvarado, El País | Inquiry related to Alexandra Lozano, asking for 11-page statement and official comment. |
| May 27 | Nick Pasion, PSBJ | Inquiry related to Alexandra Lozano, asking for 11-page statement and official comment. Shared official statement. |
| May 27 | Rachel Riley, Law 360 | Inquiry related to Alexandra Lozano. Shared official statement. |
| May 27 | Jaime Mendez, Se Habla | Inquiry related to Alexandra Lozano, in particular disciplinary procedure. Shared official statement. |
| May 27-June 9 | Jack Brook, Associated Press | Asked about public discipline information for lawyer Alexandra Lozano; ongoing conversation about discipline case and resources for clients as events developed. |
| May 27-June 8 | Yesenia Amaro, the Oregonian/OregonLive | Questions about public discipline information for lawyer Alexandra Lozano; ongoing conversation about discipline |

| | | |
|---|---|---|
| | | case and resources for clients as events developed. |
| May 28 | Gloria Ibáñez, El Sol de Yakima | Inquiry related to Alexandra Lozano, in particular recommendations for the clients. |
| June 11 | Jaylinn Herrera, NBC and Telemundo Chicago | Inquiry related to Alexandra Lozano, in particular recommendations for the clients. |

**News Releases**

- WSBA Names David J. Bentsen Local Hero
- Washington's Legal Community Launches Statewide Classroom Pledge on Law Day

**Press Coverage**

- Washington's Legal Community Launches Statewide Classroom Pledge on Law Day, TVW (Washington State Public Affairs Network), May 1, 2026
- WA mulls controversial mental health standard for lawyers, Seattle Times, May 2, 2026
- Wash. Bar Task Force Spotlights Atty Mental Health Issues, Law360, May 4, 2026
- WA immigration lawyer Alexandra Lozano sued for alleged malpractice, Seattle Times, May 11, 2026 (note: no mention of the WSBA)
- Years of complaints preceded lawsuit against Tukwila immigration attorney: 'She told me to accuse my wife of hitting me', KING 5 News, May 14, 2026
- Yakima County attorney suspended for violating professional conduct rules, Apple Valley News, May 18, 2026
- Half the Nation's Bar Apps Could Remove Rape Questions" Law360, May 19, 2026
- Washington State Opens Door for Graduates of Non-ABA-Accredited Law Schools to Sit for Bar, Law.com, May 21, 2026
- Washington joins states easing reliance on ABA accreditation of law schools, Reuters, May 22, 2026
- Grads of non-ABA-accredited law school can sit for Washington state bar exam, ABA Journal, May 22, 2026
- Lozano Civil Action: Resignation from the Washington State Bar Association, Lozano Civil Action Tracker, May 26, 2026

- Immigration attorney accused in federal lawsuit permanently resigns from Washington bar, KING 5, May 26, 2026
- Washington immigration attorney accused of fraud resigns, KGW, May 26, 2026
- WA immigration lawyer Alexandra Lozano, facing possible discipline, resigns, Seattle Times, May 26, 2026
- 'I didn't think she would fold that quick': Former clients relieved after Alexandra Lozano barred from practicing law in WA, KING 5, May 27, 2026
- 'Lawyer of Miracles' Alexandra Lozano barred from practicing law in Washington state, KING 5, May 27, 2026
- Immigration attorney who gave up license amid allegations had more than 35,000 clients, Oregonian, May 28, 2026
- Federal lawsuit accuses Tukwila-based immigration attorney of misleading clients, Oregonian, May 29, 2026
- New lawsuit alleges Alexandra Lozano's immigration playbook was replicated in Ohio, KING 5, May 29, 2026
- Immigration attorney's resignation raises concerns for clients in Oregon and Washington, KGW, June 1, 2026
- Pink jets and luxury condos: Former clients question Alexandra Lozano's lifestyle as lawsuits and complaints mount, KING 5, 2026
- Federal investigators examining former Tukwila immigration lawyer Alexandra Lozano, KING 5, June 4, 2026
- Clients of beleaguered immigration attorney seek answers amid fear, Oregonian, June 8, 2026
- 'Nothing to show for it': Former clients seek answers after Tukwila immigration attorney resigns, KING 5, June 9, 2026
    - Repost: Yahoo, June 9, 2026
- State issues alert as Tukwila immigration law firm closes, founder resigns license, KOMO News, June 10, 2026
- Luz Legal, formerly Alexandra Lozano Immigration Law, abruptly closes, KGW, June 10, 2026
- WA immigration law firm founded by Alexandra Lozano shuts down, Seattle Times, June 10, 2026
    - Repost: Yakima Herald-Republic, June 10, 2026
- Closure of immigration law firm founded by Alexandra Lozano draws dozens of concerned clients to Yakima office, Yakima Herald-Republic, June 11, 2026

# # #

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Jeanne Marie Clavere, Senior Professional Responsibility Counsel

Mark Fucile, Chair, Committee on Professional Ethics

**DATE:** June 17, 2026

**RE:** Committee on Professional Ethics—Suggested comments to selected Rules of Professional Conduct on Artificial Intelligence from joint project with the Washington State Supreme Court.

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ACTION: Approve and suggest to the Washington State Supreme Court amendments regarding the ethics of artificial intelligence in legal practice as recommended by the Committee on Professional Ethics.

**Background**

The proposed amendments to the RPC comments are a joint project with the Washington State Supreme Court. The Supreme Court developed draft comments to the RPC to provide further guidance to attorneys on ethical issues they may face when using artificial intelligence (AI). The CPE has acted in a technical capacity to provide assistance to the Supreme Court in refining the draft comments initially put forth by the Court. It is suggested that the Court and BOG act as co-proponents of the comments in the General Rule 9 rule-making process.

The RPCs that have suggested comments are**:** 1.1, 1.4, 1.5, 1.6, 3.1, 3.3, 5.1, 5.2, 5.3, 7.1 and 8.4

**CPE Analysis**

After receiving the Supreme Court's draft comments in February of this year, the CPE formed a subcommittee composed of Michele Carney, Zachary Dillon and Judge Frederick Corbit. The Subcommittee met with the Supreme Court Clerk, who acted as a conduit between the Supreme Court and the CPE. The Subcommittee, in consultation with the CPE, provided suggested edits and analysis to the Clerk for the Supreme Court's consideration. Although the WSBA addressed the use of AI tools in legal practice last year through Advisory Opinion 202505, the Supreme Court Clerk communicated to the Subcommittee the Supreme Court's desire to provide further guidance directly in the RPC comments to assist attorneys in unique ethical issues when using AI and in light of continuing rapid developments in this area affecting both lawyers and the court system.

In its work, the Subcommittee reviewed other state guidance (such as California) as well as reviewed sanction cases in both Federal and State courts. Each of these comments provide guidance to supplement the RPC with respect to AI.

Note that the same comment is recommended for Rule 5.1, 5.2 and 5.3. This comment was originally provided by the Supreme Court as one comment to all three rules. We ultimately recommend that the comment only be added under one Rule. We recommend placing it under Rule 5.1, but we are providing the same comment to all three rules in deference to the Supreme Court. The CPE held a meeting on June 12, 2026. At that meeting, friendly amendments were made and the CPE voted affirmatively for the amendments to go forward to the BOG meeting in July 2026.

**Stakeholders**

When the Supreme Court approached the WSBA about this project through the Clerk in February, the Clerk communicated the Court's direction that this project be undertaken on an expedited basis in view of the rapid developments and impacts from AI affecting law practice and the court system. Due to this expedited process, the CPE did not post the draft comments itself for public comment. The CPE anticipates, however, that the Court would ordinarily publish the comments for public comment on the court rules website and that the WSBA will provide notice of the availability of that public comment forum.

**Approval by CPE**

The Committee on Professional Ethics approved the comments at its June 12, 2026, meeting and the accompanying recommendation that the WSBA join the Supreme Court as a co-proponent of the comments in the GR 9 rule-making process.

**Conclusion**

We recommend that the BOG join the Supreme Court as a co-proponent of these comments in the GR 9 rule-making process. We respectfully believe that the comments if ultimately adopted by the Supreme Court will be very helpful to not only attorneys but also to the court system and the public as well.

**Fiscal Analysis**

The Committee on Professional Ethics is unaware of any potential fiscal impacts for the WSBA.

**Equity Analysis**

One aspect of the proposal that appeared to raise an equity issue is the potential for decision-making based on use of AI tools to be affected by biased outputs generated by AI tools. While AI technologies can produce biased outputs and may result in discriminatory treatment if used without appropriate safeguards, the Committee's suggested comments, particularly the additions to Rule 8.4, represent an important step toward mitigating these risks when lawyers use AI. In the context of this proposal the primary equity issue is the potential for decision-making assistance based on use of AI tools which can

generate biased outputs. These comments are intended to guide lawyers in recognizing and addressing potential bias in AI tools as part of their ethical obligations.
Consistent with the Supreme Court's direction, the Committee on Professional Ethics limited this facet of the current project to working with the draft comments to the Rules of Professional Conduct provided by the Supreme Court rather than exploring broader regulatory changes. The Committee and the Supreme Court Clerk's Office have also discussed a Phase Two that would take a deeper look at whether additional rule changes or regulatory approaches are needed as AI continues to evolve, including more comprehensive consideration of AI-related bias.

**Attachment**

Attached is recommended language amending comments to 1.1, 1.4, 1.5, 1.6, 3.1, 3.3, 5.1, 5.2, 5.3, 7.1 and 8.4.

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

Provided as 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 of this recommendation is primarily for staff time used to assist in drafting the suggested amendments, incorporate any approved changes into relevant records, communicating changes to stakeholders, and providing support to volunteers throughout the process of developing the recommendation. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and does 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 purpose of the equity analysis is to understand how entities incorporated an equity lens to proposed action items presented to the Board of Governors. This analysis in particular focuses on the potential for unintended consequences, with emphasis on the effectiveness with which the proposed comments help fulfill the regulatory objectives outlined in GR 12.1(j), which includes ensuring freedom from discrimination for these receiving legal services.

The rapidness with which AI tools have already been adopted and used by legal professionals creates an urgent need to update rules of professional conduct so their duties and responsibilities when using these tools are clear, including the duty to remain aware of the risks of bias and discrimination. The proposed comments are similar to changes being proposed or adopted by other states, and in line with the American Bar Association's Formal Opinion 512.[1] We understand that the CPE in collaboration with the Supreme Court are working expeditiously to mitigate the risks and harm associated with using AI through this first step of these proposed comments.

Given that large language models, generative AI, and agentic AI programs (particularly those trained on open-source data) have been consistently observed to produce biased outputs, and the use of AI tools has directly led to discriminatory treatment and outcomes in housing, healthcare, and employment[2], we recommend that CPE and the Supreme Court move forward with their potential Phase Two that would include a more comprehensive consideration of AI-related bias and take a deeper look into potential rule changes or regulatory approaches as AI continues to evolve.

We recommend this deeper and more comprehensive consideration of AI-related bias because the proposed comments may not be sufficient to prevent or address instances of AI-facilitated bias and discrimination. The proposed changes emphasize the duty of lawyers to develop and maintain awareness of how AI tools work and its associated risks and exercise their professional judgment to decide whether the benefits to their practice outweigh these risks. A joint statement on discrimination and bias in AI by the Federal Trade Commission, Consumer Financial Protection Bureau, and the U.S. Equal Employment Opportunity Commission notes that the complexity of AI systems makes it difficult even for AI developers to be aware of the degree to which models are biased without extensive data collection and analysis to assess disparate impacts.[3]

If the CPE does move forward with a Phase Two, below is a list of several regulatory approaches to reducing or mitigating AI-facilitated bias and discrimination and their tradeoffs, which are informed by a Harvard Law Review Study for its consideration.[4]

1. **Status Quo or No Action**: There are no specific rules or comments regarding the use of AI tools.
2. **Process Regulation (Proposed Comments)**: Rules broadly enable the use of AI tools in the practice of law, but puts into place procedural requirements for legal professionals such as

[1] ABA Committee On Ethics and Professional Responsibility, Formal Opinion 512 (2024).

[2] American Civil Liberties Union, "Accountability in Artificial Intelligence"

disclosing the use and risks to clients, requiring human verification of any AI-generated outputs, developing organizational policies and trainings regarding ethical use. The proposed comments are in line with this form of regulation, and the trade-offs are discussed in detail above.

3. **Prohibition**: Rules strictly prohibit using AI tools in the practice of law, or restrict the types of models they can use in the practice of law. While it would completely shield those receiving legal services from AI-facilitated bias or discrimination, rules of this nature would be difficult to enforce and ensures that the positive benefits of AI tools cannot be accessed.
4. **Regulation of Inputs**: Rules require that AI tools can only be used if the model training data omits certain inputs (such as race/ethnicity, gender, or other protected categories and proxies). The challenge with this approach is that most open-source AI developers fail to disclose the data used to train their models, nor does it address bias at the algorithm and design level. In addition, AI models have been found to reproduce biased outputs that results in disparate impacts, even when the data does not contain data about protected categories and their markers.
5. **Audit of Outputs**: Rules require that legal professionals or employers can use AI tools only if they have mechanisms in place to assess whether they result in disparate outcomes.

1 ABA Committee on Ethics and Professional Responsibility, Formal Opinion 512 (2023).

2 American Civil Liberties Union, "Accountability in Artificial Intelligence"

3 Federal Trade Commission, "Joint Statement on Enforcement Efforts Against Discrimination and Bias in Automated Systems" (2023).

4 "Resetting Antidiscrimination Law in the Age of AI ," 138 Harv. L. Rev. 1562 (2025).

## SUGGESTED AMENDMENTS TO THE RULES OF PROFESSIONAL CONDUCT
## RULE 1.1 and accompanying COMMENT [11]

**RPC 1.1 COMPETENCE** [Unchanged]

**Comments**

[1] – [8] [Unchanged]

**Additional Washington Comments**

[9] – [10] [Unchanged]

*Artificial Intelligence*

[11] With respect to artificial intelligence (AI), a lawyer must maintain a reasonable and ongoing understanding of the capabilities and limitations of the specific AI technologies the lawyer might use. A lawyer must recognize inherent risks of these tools and must verify the accuracy of AI-generated work. A lawyer's professional judgment may not be delegated to AI. See Rule 2.1.

# SUGGESTED AMENDMENTS TO THE RULES OF PROFESSIONAL CONDUCT
## RULE 1.4 and accompanying COMMENT [14]

**RPC 1.4 COMMUNICATION** [Unchanged]

### Comments

[1] – [7] [Unchanged]

### Additional Washington Comments

[8] – [13] [Unchanged]

*Artificial Intelligence*

[14] A lawyer has a duty to inform a client of the use of artificial intelligence when it is assisting in making substantial decisions, impacts the means by which a client's objectives will be met, and/or may materially impact the client's confidentiality. In evaluating whether a duty to inform exists, a lawyer should weigh the circumstances of the representation including the novelty of the technology, the risk of its use, and how the tool will process client information.

## SUGGESTED AMENDMENTS TO THE RULES OF PROFESSIONAL CONDUCT
## RULE 1.5 and accompanying COMMENT [19]

**RPC 1.5 FEES** [Unchanged]

### Comments

[1] [Unchanged]

[2] [**Washington revision**] When the lawyer has regularly represented a client, they ordinarily will have evolved an understanding concerning the basis or rate of the fee and the expenses for which the client will be responsible. In a new client-lawyer relationship, however, an understanding as to fees and expenses must be promptly established, including any fees for the use of artificial intelligence tools or services. Generally, it is desirable to furnish the client with at least a simple memorandum or copy of the lawyer's customary fee arrangements that states the general nature of the legal services to be provided, the basis, rate or total amount of the fee and whether and to what extent the client will be responsible for any costs, expenses or disbursements in the course of the representation. A written statement concerning the terms of the engagement reduces the possibility of misunderstanding. See Washington Comment [17] for fee agreements that include LLLT services.

[3] – [9] [Unchanged]

### Additional Washington Comments

[10] – [19] [Unchanged]

## SUGGESTED AMENDMENTS TO THE RULES OF PROFESSIONAL CONDUCT
## RULE 1.6 and accompanying COMMENT [29]

**RPC 1.6 CONFIDENTIALITY OF INFORMATION** [Unchanged]

### Comments

[1] – [20] [Unchanged]

### Additional Washington Comments

[21] – [28] [Unchanged]

*Artificial Intelligence*

[29] Before a lawyer enters information relating to the representation of a client into an AI tool, a lawyer must evaluate the risk that the information will be disclosed to or accessed by others inside or outside the firm. A lawyer must not provide any information relating to the representation of a client to an AI tool that lacks adequate confidentiality and security protections and must ensure the service provider does not use or share that information for its own purposes. A lawyer has an ongoing duty to remain knowledgeable about how the AI tool collects, uses, and protects confidential information, including reviewing the terms of use, monitoring updates, and understanding how the software operates.

## SUGGESTED AMENDMENTS TO THE RULES OF PROFESSIONAL CONDUCT
## RULE 3.1 and accompanying COMMENT [4]

**RPC 3.1 MERITORIOUS CLAIMS AND CONTENTIONS** [Unchanged]

**Comments**

[1]-[3] [Unchanged]

*Artificial Intelligence*

[4] Lawyers may use artificial intelligence and other automated technologies to assist in legal research, drafting, and case evaluation. However, such use does not relieve the lawyer of the duty to ensure that their claims and contentions have a nonfrivolous basis in law and fact. Reliance on technology does not diminish a lawyer's obligation to exercise human judgment and act with reasonable diligence, and lawyers should not rely on AI-generated output without verifying and confirming its accuracy.

**SUGGESTED AMENDMENTS TO THE RULES OF PROFESSIONAL CONDUCT**
**RULE 3.3 and accompanying COMMENT [16]**

**RPC 3.3 CANDOR TOWARD THE TRIBUNAL** [Unchanged]

**Comments**

[1]-[15] [Unchanged]

*Artificial Intelligence*

[16] A lawyer must verify the accuracy of all AI generated output before submitting them to a tribunal. This includes ensuring there are no misstatements of law or fact, frivolous arguments, citations to nonexistent authorities, misrepresentation of the holdings of existing authorities, or other inaccuracies.

**SUGGESTED AMENDMENTS TO THE RULES OF PROFESSIONAL CONDUCT**
**RULE 5.1 and accompanying COMMENT [9]**

**RPC 5.1 RESPONSIBILITIES OF PARTNERS, MANAGERS, AND SUPERVISORY LAWYERS** [Unchanged]

**Comments**

[1] – [8] [Unchanged]

*Artificial Intelligence*

[9] Managerial and supervisory lawyers should establish clear policies regarding the permissible use of artificial intelligence, and supervisory lawyers must make reasonable efforts to ensure that the firm's lawyers and nonlawyers comply with professional obligations when using AI, including training in the ethical and practical use of AI tools relevant to their work and the associated risks.

## SUGGESTED AMENDMENTS TO THE RULES OF PROFESSIONAL CONDUCT
## RULE 5.2 and accompanying COMMENT [3]

**RPC 5.2 RESPONSIBILITIES OF A SUBORDINATE LAWYER**
[Unchanged]

### Comments

[1] – [2] [Unchanged]

*Artificial Intelligence*

[3] Managerial and supervisory lawyers should establish clear policies regarding the permissible use of artificial intelligence, and supervisory lawyers must make reasonable efforts to ensure that the firm's lawyers and nonlawyers comply with professional obligations when using AI, including training in the ethical and practical use of AI tools relevant to their work and the associated risks.

# SUGGESTED AMENDMENTS TO THE RULES OF PROFESSIONAL CONDUCT
## RULE 5.3 and accompanying COMMENT [6]

**RPC 5.3 RESPONSIBILITIES REGARDING NONLAWYER ASSISTANTS**
[Unchanged]

### Comments

[1] – [4] [Unchanged]

### Additional Washington Comments

[5] [Unchanged]

*Artificial Intelligence*

[6] Managerial and supervisory lawyers should establish clear policies regarding the permissible use of artificial intelligence, and supervisory lawyers must make reasonable efforts to ensure that the firm's lawyers and nonlawyers comply with professional obligations when using AI, including training in the ethical and practical use of AI tools relevant to their work and the associated risks.

# SUGGESTED AMENDMENTS TO THE RULES OF PROFESSIONAL CONDUCT
## RULE 7.1 and accompanying COMMENT [15]

**RPC 7.1 COMMUNICATIONS CONCERNING A LAWYER'S SERVICES**
[Unchanged]

### Comments

[1] – [4] [Unchanged]

### Additional Washington Comments

[5] – [14] [Unchanged]

*Artificial Intelligence*

[15] Lawyers may use AI in marketing, but any such use must be consistent with the lawyer's duty not to make false or misleading communications about the lawyer or the lawyers' services. Lawyers must maintain reasonably effective human oversight of all automated systems used to engage with clients or prospective clients.

## SUGGESTED AMENDMENTS TO THE RULES OF PROFESSIONAL CONDUCT
## RULE 8.4 and accompanying COMMENTS [9] and [10]

**RPC 8.4 MISCONDUCT** [Unchanged]

### Comments

[1] – [5] [Unchanged]

### Additional Washington Comments

[6] – [8] [Unchanged]

*Artificial Intelligence*

[9] A lawyer using AI tools should be aware of possible biases and the risks they may create and have mechanisms in place to attempt to address those potential AI biases.

[10] It is prejudicial to the administration of justice to submit inaccurate information to a tribunal by failing to adequately check the accuracy of legal filings and citations created with the assistance of artificial intelligence tools. Filing inaccurate legal materials or false citations under these circumstances may also violate Rule 3.1 or 3.3.

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors

From: Tiffany Lynch, Director of Finance

cc: Executive Leadership Team

Re: FY 2027 Budgets – 1st Draft

Date: June 15, 2026

*The Budget and Audit Committee reviewed the first draft of the FY 2027 budget at their meeting on June 15, 2026.*

The WSBA budget guides fund allocation to fulfill regulatory duties, safeguard the public, and assist legal professionals in their legal work. Prepared annually, it supports programs aligned with our mission and may be amended during the year to address unexpected changes.

This memo outlines variances between the FY 2027 first draft and FY 2026 budget, with additional information supporting the key areas of change. Individual cost center budget details are included in attachments along with a WSBA Budget Glossary (*see* ***attachment E***) for reference.

## BUDGET COMPARISON: FY 2026 vs FY 2027

| ALL FUNDS BUDGET[1] | FY 2026 | FY 2027 | Difference | % Change |
|---|---|---|---|---|
| REVENUE | $26,027,883 | $26,085,078 | +$57,195 | +0.2% |
| EXPENSE | $26,832,570 | $27,952,711 | +$1,120,141 | +4.2% |
| *Direct Expense* | *$3,851,105* | *$3,847,257* | *($3,848)* | *(0.1%)* |
| *Indirect Expense* | *$22,981,465* | *$24,105,454* | *+$1,123,989* | *+4.9%* |
| **NET INCOME/(LOSS)** | **($420,312)** | **($1,867,633)** | **+$1,447,321[2]** | |
| Use of Facilities Reserve | $744 | $744 | $0 | |
| Use of Special Projects & Innovation Reserve | $224,255 | $91,813 | ($132,442) | |
| **NET INCOME/(LOSS) w/use of designated reserves** | **($195,313)** | **($1,775,076)** | **+$1,579,763[2]** | |

The preliminary FY 2027 WSBA budget separates finances into three funds: the General Fund, CLE Fund, and Client Protection Fund. (A fourth fund dedicated to Sections will be added in August.) Each fund maintains specific reserves that are adjusted annually based on the financial outcomes of their respective cost centers.

[1] Includes General, CLE, and Client Protection Funds. Sections funds will be presented in August.
[2] A positive number indicates an increase in the net loss amount from FY 2026 Budget to FY 2027 Budget.

Attorney license fees are WSBA's primary source of revenue, accounting for nearly 70% of its annual budget. The largest expense for WSBA is indirect costs—which include salaries, benefits, and other overhead expenses. Indirect costs represent about 85% of the expense budget and are influenced by rising market prices for labor, employee benefits, and related items.

**(1) GENERAL FUND**

The General Fund accounts for most of WSBA's activities, including regulatory duties and many services provided to members and the public. License fees serve as the main revenue source for the 41 cost centers supported by the General Fund. The initial FY 2027 General Fund budget is calculated using attorney license fees of $475 for the 2027 calendar year, reflecting a $7 increase from the 2026 fee of $468.

The FY 2027 budget incorporates designated reserve funds to address ongoing equipment depreciation related to the WSBA's office space downsizing initiative (utilizing Facilities Reserves), as well as to support the principal development activities of the Licensure Pathways project (drawing from Special Projects and Innovation Reserves). The Licensure Pathways project is scheduled for deployment in FY 2027 and it is expected that all reserve funds earmarked for the project will be spent in full by the end of the 2027 fiscal year. (*See **attachment A** for General Fund detailed cost center budgets.)*

| General Fund Budget | FY 2026 | FY 2027 | Difference | % Change |
|---|---|---|---|---|
| ▪ Revenue | $23,485,538 | $24,313,188 | +$827,650 | +3.5% |
| ▪ Expenses | $24,402,843 | $25,585,386 | +$1,182,543 | +4.8% |
| ▪ Net Income/(Loss) | ($917,304) | ($1,272,198) | +$354,894[3] | |
| ▪ Use of Facilities Reserves | $744 | $744 | $0 | |
| ▪ Use of Special Projects & Innovation Reserves | $224,255 | $91,813 | ($132,442) | |
| ▪ **NET INCOME/(LOSS) w/use of designated reserves** | **($692,306)** | **($1,179,641)** | **+$487,335[3]** | |

**(2) CLE FUND**

The CLE Fund is a board-designated reserve from CLE net income, used to cover losses and major costs for CLE programs, products, or capital needs. The FY 2027 CLE Fund Budget has three cost centers: CLE Products, CLE Seminars, and Deskbooks. (*See **attachment B** for CLE Fund detailed cost center budgets.)*

| CLE Fund Budget | FY 2026 | FY 2027 | Difference | % Change |
|---|---|---|---|---|
| ▪ Revenue | $1,596,865 | $1,616,890 | +$20,025 | +1.3% |
| ▪ Expenses | $1,728,347 | $1,657,053 | ($71,294) | (4.1%) |
| ▪ **NET INCOME/(LOSS)** | **($131,482)** | **($40,163)** | **($91,319)[3]** | |

**(3) CLIENT PROTECTION FUND (CPF)**

The Client Protection Fund (CPF), established in 1995 by the Washington Supreme Court and WSBA, compensates individuals who suffer financial loss due to lawyer dishonesty or mishandling of client funds. It is funded primarily through annual fees from active members and *pro hac vice* admissions as mandated by the Court. (*See **attachment C** for Client Protection Fund detailed cost center budgets.)*

[3] A positive (+) difference means an increase in the net income or loss and a negative (-) difference means that there is a decrease in the net income or loss from the FY 2026 budget.

| Client Protection Fund Budget | FY 2026 | FY 2027 | Difference | % Change |
|---|---|---|---|---|
| ▪ Revenue | $945,480 | $155,000 | ($790,480) | (83.6%) |
| ▪ Expenses | $701,380 | $710,272 | +$8,892 | +1.3% |
| ▪ **NET INCOME/(LOSS)** | **$244,100** | **($555,272)** | **+$799,372[4]** | |

## CAPITAL BUDGET

The Capital Budget is meant to address the cost of purchasing, refreshing, and/or replacing outdated hardware and office equipment. Anticipated FY 2027 items include replacement of computer hardware and mailing equipment and a security camera system upgrade. *(See **attachment D** for capital budget details.)*

## KEY AREAS OF CHANGE

Provided below is a list of the key areas of change between the FY 2026 and FY 2027 budget followed by relevant narrative information for items with an asterisk.

| Revenue Changes from FY 2026 Budget ($20,000 or greater) | Budget Impact |
|---|---|
| **GENERAL FUND:** | **+$827,650** |
| ▪ **License fees:** increase of $7 for full active fee membership starting 2027 and related increase to late fees | +$394,265 |
| ▪ **Admissions fees:** increase in bar exam fees and addition of portfolio application fees (pending BOG approval) | +$371,800 |
| ▪ **Bar News (net):** increase to display and job target advertising to align with actual revenue collection trends in FY 2026 | +$105,000 |
| ▪ **Law Clerk Fees:** increase to align with current enrollment and revenue collected for program fees | +$89,000 |
| ▪ **MCLE fees:** actual revenue figures are consistently trending higher; increase to align closer to actual | +54,500 |
| ▪ **New Member Education:** reduction based on anticipated product releases | ($22,000) |
| ▪ **Interest Income:** lower interest rate return on investments expected | ($150,000) |
| **CLE FUND:** | **+$20,025** |
| ▪ **Royalties (DESK):** increase to align with current royalty earnings | +$36,000 |
| ▪ **Digital Video Sales (CLEP):** increase based on anticipated sales for FY 2027 | +$25,000 |
| ▪ **Seminar Registrations (CLES):** decreased to align with current revenue trend | ($63,645) |
| **CLIENT PROTECTION FUND:** | **($790,480)** |
| ▪ **Interest Income:** lower interest rate return on investments expected | **($55,000)** |
| ▪ **CPF Member Assessments:** assessment rate reduced from $20 to $0 for 2027 | **($735,480)** |
| **Total Increase in Revenue from FY 2026 Budget** | **+$57,195** |

| Indirect Expense Changes from FY 2026 Budget ($20,000 or greater) | Budget Impact |
|---|---|
| **SALARIES:** | **+$683,931** |
| ▪ **Compensation Increases*:** increase in compensation grid, annual increases for existing employees, and position reclassifications (see narrative for details). | +$540,165 |

[4] A positive (+) difference means an increase in the net income or loss and a negative (-) difference means that there is a decrease in the net income or loss from the FY 2026 budget.

| | |
|---|---|
| ▪ **FTEs*:** Increase of 2.4 FTE (see narrative for details). | +$189,948 |
| ▪ **Temporary Employees:** reduction to total number of seasonal temporary employees needed for FY 2027. | ($46,182) |
| **BENEFITS & PAYROLL TAXES:** | **+$615,320** |
| ▪ **Medical:** increase to 1) align budget with FY 2026 actual rates which were higher than budgeted and less conservative budgeting, 2) account for estimated rate increase of 5% across all plans, and 3) addition of coverage for new FTEs | +$491,252 |
| ▪ **FICA:** increase resulting from change in salaries budget | +$54,623 |
| ▪ **Unemployment Insurance:** increase to 1) align budget with FY 2026 rates which are higher than budgeted and 2) account for increase in salaries budget | +$21,184 |
| **OTHER INDIRECTS:** | **($175,262)** |
| ▪ **Rent:** anticipated increase in operating costs for WSBA's office space lease | +$66,945 |
| ▪ **Depreciation: Computer Hardware:** increased to align with FY 2026 actual expenses which are tracking ahead of budget | +$30,277 |
| ▪ **Human Resources Pooled Expenses:** reduction resulting from one-time cost needs budgeted in FY 2026 for staff training and implementation of an HR software module | ($20,150) |
| ▪ **Depreciation: Computer Software:** completion of useful life depreciation for a number of organization-wide software items in FY 2027 | ($33,713) |
| ▪ **Depreciation: Furniture, Leasehold Improvement, & Office Equipment:** completion of useful life depreciation for prior office lease items | ($78,278) |
| ▪ **Computer Pooled Expenses:** includes reductions for computer software, and software maintenance & licensing to align with current needs, and removal of one-time implementation costs for a new association management system budgeted in consulting services | ($172,507) |
| **Total Increase in Indirect Expense from FY 2026 Budget** | **+$1,123,989** |

| Direct Expense Changes from FY 2026 Budget ($20,000 or greater) | Budget Impact |
|---|---|
| **GENERAL FUND:** | **+$119,112** |
| ▪ **Conference/Institute Expense (ATJ):** ATJ conference held every other year. Expenses include WSBA contribution of $35,000 (increased from $30,000 in FY 2025) and $19,000 previously budgeted under the Reception/Forum expense budget for conference honorariums, security, and accessibility support | +$54,000 |
| ▪ **Admissions (net):** includes reduction of cost of UBE examinations as part of transition to NextGen bar exam and increases in exam grading and software hosting for implementation of the portfolio pathway | +$32,265 |
| ▪ **Postage (Bar News)**: increase in postage rates for mailing of magazine | +$25,000 |
| ▪ **Surveys (Communications):** previously budgeted in the BOG cost center under BOG Travel & Outreach, not a new expense | +$20,000 |
| ▪ **Software Hosting (Regulatory Reform):** cost moved to Admissions for licensure portfolio pathway implementation | ($20,000) |
| **CLE FUND:** | **($127,460)** |
| ▪ **Online Product Hosting (CLEP):** lower cost due to switch in vendor providing hosting services | ($24,000) |
| ▪ **Obsolete Inventory (DESKBOOKS):** expenses eliminated due to completion of write off for remaining inventory of aged products in FY 2026. | ($118,700) |
| **CLIENT PROTECTION FUND:** | **+$4,500** |
| **Total Decrease in Direct Expense from FY 2026 Budget** | **($3,848)** |

## A. Indirect Expenses:

1) ***Compensation Increases (+$540,165):*** WSBA bases job grades on factors such as responsibility, skill, knowledge, and education, with steps indicating years of experience. Each grade-step pair corresponds to a specific salary, which is determined by market benchmarks. To maintain

competitive compensation, we conduct annual reviews and periodic comprehensive studies—the latest in FY 2024 resulted in a 3% increase at the market midpoint for FY 2025. This year, after reviewing market conditions, it is recommended that we raise the compensation structure by 1.5%. The FY 2027 salary budget assumes every employee will move up one step within their grade and includes needed position reclassifications that have been identified in recent years.

2) ***Staffing Needs (+$189,948)*:** a total of 2.4 FTE has been identified for additional staffing support in two departments, the Office of Disciplinary Counsel and Advancement. Below is a summary of the position needs.

   a) **1.0 FTE Disciplinary Counsel:** The Intake team needs a Disciplinary Counsel due to a 20% surge in grievances since 2024, a trend expected to continue. The department also foresees additional duties arising from future Entity Regulation Pilot Project grievances alongside current grievance types. Disciplinary Counsel are responsible for reviewing grievances, requesting responses, determining if investigations are needed, drafting dismissal letters, keeping records for the Disciplinary Board's review committee when a grievant seeks reconsideration, and responding to questions from both respondent lawyers and grievants.

   b) **1.0 FTE Program Coordinator:** The addition of the Ethics, Wellness and Practice Program Coordinator fills a longstanding gap in administrative and operational support across the Professional Responsibility, Member Wellness, and Practice Management programs. Currently, each program's manager or advisor performs significant administrative and logistical tasks that dilute their capacity to deliver higher-level services. Centralizing these duties under a dedicated coordinator improves efficiency, consistency, and responsiveness while enabling the higher-level staff to focus on substantive program work. This shared support role will provide scalable infrastructure needed to meet increased expectations identified by the Legal Tech Task Force and WSBA Well-Being Task Force, ensuring WSBA can effectively deliver enhanced services to its members.

   c) **0.4 FTE Professional Responsibility Manager:** The Professional Responsibility Manager position is being restored to full-time and restructured to ensure unified leadership of the Ethics, Wellness, and Practice Management Team. This position has always been full-time. The previous reduction to .6 FTE was a temporary accommodation for the current manager who is nearing retirement, and returning the role to full-time is necessary to meet current and growing operational needs. Consolidating supervision of the Wellness Program Manager and Practice Management Advisor under this position reestablishes a similar structure historically used at WSBA and strengthens alignment among the three related program areas. This change ensures consistent leadership and improves coordination across programs, better supporting WSBA members and advancing the recommendations of the Legal Tech and Well-Being task forces.

# OTHER INFORMATION AND ITEMS FOR CONSIDERATION

Presented below is a summary of items we believe warrant your attention. These items may not meet the threshold for dollar variance mentioned previously, are included in the first draft but require further explanation, or are currently excluded from the first draft yet may be incorporated into the final version. We welcome your input as we continue to refine the budget.

1) **Ombudsperson**
   In fiscal year 2025, WSBA's Executive Leadership Team identified an operational priority to assess the feasibility of establishing an ombuds position, with a subsequent directive in FY 2026 to develop

a concrete proposal. This initiative stems from the volume of questions, complaints, and requests for assistance related to regulatory matters that may not be optimally addressed by regulatory staff. Introducing a neutral and independent individual to serve as a point of contact and with an ability to internally review concerns about regulatory processes and make recommendations would enhance user experience and allow regulatory staff to focus more effectively on their core responsibilities. The ombudsperson would triage various inquiries, listen, collaborate, redirect individuals to appropriate personnel, provide information, guide inquirers to relevant agencies or resources, and make recommendations to regulatory staff and the Executive Director. If WSBA were to move forward with developing this role, it would likely mean hiring a staff person and/or engaging with an independent contractor for a pilot project. The first draft of the FY 2027 budget does not include funds for an ombudsperson. We would appreciate feedback on the value of this service.

2) **WSBA Entity Requests**
It is normal for WSBA entities to request different levels of funding each year, depending on their workplan. Highlighted below are some more significant changes and requests from WSBA entities for FY 2027:

- ***Washington New Members Committee:*** Expenses related to this committee are listed in the Member Services and Engagement cost center, totaling $49,000—an increase of $29,000 compared to the FY 2026 budget. This rise reflects planned updates to the WNMC charter, an intention to support more WNMC member attendance at ABA annual and midyear meetings, and a greater number of scheduled outreach events.

- ***Council on Public Defense:*** Expenses for this are listed under the Access to Justice cost center, totaling $26,500—which is $15,500 more than the FY 2026 budget. The increased budget is due to plans to hold two in-person meetings: one will be an annual strategic planning retreat in central Washington, and the other will take place at Gonzaga University alongside a law student event. These are new initiatives, as neither event was previously included or funded.

3) **Professional Fees- Legal**
The first draft of the budget includes $250,000 for legal fees which is the same as the FY 2026 budget. The costs in this budget line vary greatly each year depending on the matters that come forward requiring outside counsel assistance. The budget for this line item has historically been conservative, and actual results are normally less than the budget. Funds expended from this budget are generally intended for legal support in matters where WSBA is a defendant. For the FY 2027 budget, while the budget amount remains unchanged from the prior year, we acknowledge that it is possible that at some point WSBA may also be in need of legal services for prosecutorial purposes. While it may be a rare occurrence, we believe that the current budget amount is sufficient to support those needs at this time.

# PROJECTED FUND BALANCES

The chart below illustrates WSBA's reserve balances at the end of FY 2027. Approving the FY 2027 budget reflects an intentional use of WSBA's reserves. This plan includes intentionally setting license fees lower than what is needed to balance the annual budget. Consequently, it is essential to consider how WSBA's reserve balances will be affected if the FY 2027 budget is approved. This analysis assumes that WSBA's financial results for FY 2026 match the budget projections; however, WSBA has historically performed better than its budgeted figures.

| | BALANCE @ 9/30/2025 | FY 2026 BUDGET | FY 2027 BUDGET 1st DRAFT | ESTIMATED BALANCE @ 9/30/2027 |
|---|---|---|---|---|
| **GENERAL FUND** | $10,030,146 | ($917,304) | ($1,272,198) | **$7,840,644** |
| **OPERATING** | $2,500,000 | $0 | $0 | **$2,500,000** |
| **FACILITIES** | $159,925 | ($744) | ($744) | **$158,437** |
| **SPECIAL PROJECTS & INNOVATION** | $616,067 | ($224,255) | ($91,812) | **$300,000** |
| **UNRESTRICTED** | $6,754,154 | ($692,306) | ($1,179,641) | **$4,882,207** |
| **CLE FUND** | $1,233,727 | ($131,482) | ($40,163) | **$1,062,082** |
| **CLIENT PROTECTION** | $5,307,092 | +$244,100 | ($555,272) | **$4,995,920** |

## ATTACHMENTS

| | |
|---|---|
| **A** | **Draft FY 2027 General Fund Budget** |
| **B** | **Draft FY 2027 CLE Budget** |
| **C** | **Draft FY 2027 CPF Budget** |
| **D** | **Draft FY 2027 Capital Budget** |
| **E** | **Budget Glossary** |

# ATTACHMENT A

**Washington State Bar Association Financial Summary**
**Fiscal Year 2027 Budget**

| Category | FY27 Budget Revenues | FY27 Budget Indirect Expenses | FY27 Budget Direct Expenses | FY27 Budget Total Expenses | FY27 Budget Net Result |
|---|---|---|---|---|---|
| Access to Justice | - | 266,015 | 181,600 | 447,615 | (447,615) |
| Admissions/Bar Exam | 1,851,240 | 1,171,250 | 492,095 | 1,663,345 | 187,895 |
| Advancement FTE | - | 342,650 | 4,400 | 347,050 | (347,050) |
| Bar News | 634,600 | 345,372 | 407,945 | 753,317 | (118,717) |
| Board of Governors | - | 238,964 | 366,900 | 605,864 | (605,864) |
| Conference and Broadcast Services | - | 85,276 | - | 85,276 | (85,276) |
| Character & Fitness Board | - | 171,242 | 27,000 | 198,242 | (198,242) |
| Communications Strategies | 1,000 | 714,799 | 240,465 | 955,264 | (954,264) |
| Communications Strategies FTE | - | 269,210 | - | 269,210 | (269,210) |
| Discipline | 83,000 | 7,040,897 | 193,303 | 7,234,200 | (7,151,200) |
| Diversity | 115,000 | 326,480 | 70,180 | 396,660 | (281,660) |
| Entity Regulation | 87,000 | 97,768 | 28,949 | 126,717 | (39,717) |
| Facilities and Operations | - | 821,922 | 5,071 | 826,993 | (826,993) |
| Finance | 450,000 | 1,271,431 | 4,955 | 1,276,386 | (826,386) |
| Foundation | - | 187,453 | 21,917 | 209,370 | (209,370) |
| Human Resources | - | 574,740 | - | 574,740 | (574,740) |
| Law Clerk Program | 313,000 | 181,883 | 56,860 | 238,744 | 74,256 |
| Legislative | - | 280,767 | 27,290 | 308,057 | (308,057) |
| Legal Lunchbox | 34,000 | 60,643 | 8,100 | 68,743 | (34,743) |
| Licensing and Membership Records | 509,300 | 850,078 | 37,067 | 887,146 | (377,846) |
| Licensing Fees | 18,046,531 | - | - | - | 18,046,531 |
| Limited License Legal Technician | 15,450 | 70,268 | 9,500 | 79,768 | (64,318) |
| Limited Practice Officers | 180,600 | 96,244 | 29,792 | 126,037 | 54,563 |
| Mandatory CLE | 1,392,750 | 700,492 | 150,032 | 850,525 | 542,225 |
| Member Wellness Program | 6,000 | 303,061 | 5,675 | 308,736 | (302,736) |
| Member Services & Engagement | 14,400 | 333,236 | 135,320 | 468,556 | (454,156) |
| Mini CLE | - | 135,582 | - | 135,582 | (135,582) |
| New Member Education | 120,000 | 120,264 | 4,000 | 124,264 | (4,264) |
| Office of General Counsel | - | 1,176,318 | 26,200 | 1,202,518 | (1,202,518) |
| Office of the Executive Director | - | 960,339 | 137,925 | 1,098,264 | (1,098,264) |
| OGC-Disciplinary Board | - | 230,821 | 137,250 | 368,071 | (368,071) |
| Practice of Law Board | - | 115,858 | 3,200 | 119,058 | (119,058) |
| Practice Management Assistance | 66,000 | 186,961 | 94,795 | 281,756 | (215,756) |
| Professional Responsibility Program | - | 313,855 | 7,390 | 321,245 | (321,245) |
| Public Service Programs | 118,317 | 322,255 | 19,700 | 341,955 | (223,638) |
| Publication and Design Services | - | 131,184 | 5,000 | 136,184 | (136,184) |
| Regulatory Services FTE | - | 439,205 | 14,890 | 454,095 | (454,095) |
| Regulatory Reform | - | 54,689 | 40,000 | 94,689 | (94,689) |
| Sections Administration | 275,000 | 353,803 | 2,400 | 356,203 | (81,203) |
| Technology | - | 954,927 | - | 954,927 | (954,927) |
| Volunteer Engagement | - | 261,600 | 28,417 | 290,017 | (290,017) |
| **Subtotal General Fund** | **24,313,188** | **22,559,802** | **3,025,584** | **25,585,386** | **(1,272,198)** |
| Expenses using reserve funds | | | | (92,557) | 92,557 |
| **Total General Fund - Net Result from Operations** | **24,313,188** | | | **25,492,829** | **(1,179,641)** |
| CLE-Seminars and Products | 1,470,890 | 1,086,979 | 306,965 | 1,393,944 | 76,946 |
| CLE - Deskbooks | 146,000 | 260,001 | 3,108 | 263,109 | (117,109) |
| **Total CLE** | **1,616,890** | **1,346,980** | **310,073** | **1,657,053** | **(40,163)** |
| Expenses using Facilities Reserve funds | - | | | - | - |
| **Total CLE Fund - Net Result from Operations** | **1,616,890** | | | **1,657,053** | **(40,163)** |
| | | | | | |
| **Total All Sections** | **-** | | **-** | **-** | **-** |
| | | | | | |
| Client Protection Fund-Restricted | **155,000** | **198,672** | **511,600** | **710,272** | **(555,272)** |
| Expenses using Facilities Reserve funds | - | | | - | - |
| **Total CPF Fund - Net Result from Operations** | **155,000** | | | **710,272** | **(555,272)** |
| **Totals** | **26,085,078** | **24,105,454** | **3,847,257** | **27,952,711** | **(1,867,633)** |
| **Totals Net of Use of Reserve Funds** | **26,085,078** | **24,105,454** | **3,847,257** | **27,860,154** | **(1,775,076)** |

## Washington State Bar Association
### Budget Comparison

| Cost Center | FY27 FTE | 143.90 | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| All | FY26 FTE | 141.50 | | | | | | | |
| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
| Revenue | 40200 | COPY FEES | - | - | - | | - | - |
| | 40205 | DIVERSION | 9,000 | 6,000 | (3,000) | -33% | 2,500 | 2,000 |
| | 40210 | RECORDS REQUEST FEES | - | - | - | | 270 | - |
| | 40300 | DONATIONS & GRANTS | 267,635 | 233,317 | (34,318) | -13% | 271,846 | 142,139 |
| | 40500 | INTEREST - INVESTMENTS | 800,000 | 595,000 | (205,000) | -26% | 1,057,586 | 419,200 |
| | 40600 | LICENSE FEES | 16,922,074 | 17,279,644 | 357,570 | 2% | 16,399,640 | 8,185,024 |
| | 40605 | ENTITY LICENSE FEES | - | - | - | | - | - |
| | 40610 | ENTITY LATE LICENSE FEES | - | - | - | | - | - |
| | 40625 | LICENSE FEES - NEW ADMITTEES | 465,192 | 451,887 | (13,305) | -3% | 457,728 | 288,154 |
| | 40650 | LICENSE FEES - LATE FEES | 250,000 | 300,000 | 50,000 | 20% | 455,102 | 477,437 |
| | 40675 | LICENSE FEES - REINSTATEMENTS | 15,000 | 15,000 | - | 0% | 18,950 | 7,288 |
| | 40705 | EXAM SOFTWARE REVENUE | 9,500 | - | (9,500) | -100% | 32,820 | - |
| | 40800 | PUBLICATIONS REVENUE | 1,250 | - | (1,250) | -100% | 2,798 | - |
| | 40900 | ROYALTIES | 74,800 | 82,400 | 7,600 | 10% | 85,972 | 45,349 |
| | 40950 | NME PRODUCT SALES | 120,000 | 100,000 | (20,000) | -17% | 139,406 | 90,654 |
| | 41000 | SHIPPING & HANDLING | 210 | - | (210) | -100% | 117 | 36 |
| | 41100 | STATUS CERTIFICATE FEES | 29,000 | 29,000 | - | 0% | 30,900 | 17,174 |
| | 41325 | LUNCHEON REGISTRATION | - | - | - | | 910 | 4,485 |
| | 41435 | BENCH-BAR-PRESS MEMBERSHIP DUES | - | - | - | | 200 | 1,800 |
| | 41450 | SPONSORSHIPS | 11,500 | 9,000 | (2,500) | -22% | 11,600 | 9,000 |
| | 41500 | ANNUAL OR OTHER MEETING REV | 7,500 | - | (7,500) | -100% | 3,625 | - |
| | 41650 | RECEPTIONS REVENUE | - | - | - | | 4,300 | - |
| | 41700 | CONFERENCES & INSTITUTES | 2,793 | - | (2,793) | -100% | 99,012 | - |
| | 41800 | SEMINAR REGISTRATIONS | 742,535 | 673,890 | (68,645) | -9% | 570,321 | 158,876 |
| | 41805 | MINI-CLE REVENUE | 32,780 | - | (32,780) | -100% | 38,660 | 21,782 |
| | 41825 | SEMINAR REVENUE-OTHER | 32,500 | 35,500 | 3,000 | 9% | 27,915 | 16,000 |
| | 41850 | SEMINAR SPLITS W/ CLE | (13,650) | (135,000) | (121,350) | 889% | 0 | - |
| | 41855 | CLE SECTION SPLITS PROJECTIONS | - | - | - | | - | - |
| | 41875 | SEMINAR SPLITS W/ OTHERS | 21,500 | - | (21,500) | -100% | 25,069 | 1,498 |
| | 42207 | BAR EXAM FEES | 1,300,000 | 1,554,500 | 254,500 | 20% | 1,527,975 | 1,209,695 |
| | 42230 | BAR EXAM LATE FEES | 95,000 | 65,000 | (30,000) | -32% | 67,200 | 42,600 |
| | 42232 | HOUSE COUNSEL APPLICATION FEES | 55,000 | 45,000 | (10,000) | -18% | 56,490 | 18,430 |
| | 42233 | APPLICATION FEES | 28,000 | 22,000 | (6,000) | -21% | - | 15,000 |
| | 42234 | ANNUAL FEES | 47,500 | 65,000 | 17,500 | 37% | - | - |
| | 42236 | PORTFOLIO APPLICATION FEES | - | 148,000 | 148,000 | | - | - |
| | 42270 | RULE 9/LEGAL INTERN FEES | 13,000 | 31,800 | 18,800 | 145% | 16,400 | 2,650 |
| | 42275 | LAW CLERK FEES | 220,000 | 308,000 | 88,000 | 40% | 251,493 | 251,667 |
| | 42281 | LLLT LICENSE FEES | 17,000 | 15,000 | (2,000) | -12% | 16,235 | 8,012 |
| | 42285 | FOREIGN LAW CONSULTANT FEES | 1,940 | 1,940 | - | 0% | 2,910 | 970 |
| | 42286 | LAW CLERK APPLICATION FEES | 4,000 | 5,000 | 1,000 | 25% | 5,100 | 3,300 |
| | 42287 | SPECIAL ADMISSIONS | 5,000 | 5,000 | - | 0% | 9,590 | 4,190 |
| | 42288 | INVESTIGATION FEES | 26,000 | 25,600 | (400) | -2% | 26,900 | 11,080 |
| | 42290 | PRO HAC VICE | 435,000 | 450,000 | 15,000 | 3% | 478,994 | 281,982 |
| | 42291 | LLLT LATE LICENSE FEES | 137 | 300 | 163 | 119% | 365 | 541 |
| | 42450 | AUDIT REVENUE | 1,000 | 2,000 | 1,000 | 100% | 680 | 914 |
| | 42570 | 50 YEAR MEMBER TRIBUTE LUNCH | 1,000 | 1,000 | - | 0% | 1,231 | - |
| | 42710 | BNEWS DISPLAY ADVERTISING | 405,000 | 450,000 | 45,000 | 11% | 462,242 | 254,289 |
| | 42720 | BNEWS SUBSCRIPT/SINGLE ISSUES | 100 | 100 | - | 0% | 108 | 140 |
| | 42730 | BNEWS CLASSIFIED ADVERTISING | 2,500 | 2,500 | - | 0% | 4,952 | 2,773 |
| | 42760 | JOB TARGET ADVERTISING | 120,000 | 180,000 | 60,000 | 50% | 107,157 | 60,340 |
| | 43100 | DESKBOOK SALES | 5,120 | 10,000 | 4,880 | 95% | 14,722 | 3,386 |
| | 43200 | COURSEBOOK SALES | 3,500 | 3,500 | - | 0% | 980 | 325 |
| | 43400 | DIGITAL VIDEO SALES | 900,000 | 925,000 | 25,000 | 3% | 904,335 | 539,773 |
| | 43450 | SECTION PUBLICATION SALES | - | - | - | | 90 | 70 |
| | 43455 | LEXIS/NEXIS ROYALTIES | 75,000 | 96,000 | 21,000 | 28% | 67,020 | 20,594 |
| | 43525 | CASEMAKER ROYALTIES | 25,000 | 40,000 | 15,000 | 60% | 38,162 | 9,878 |
| | 44100 | WSBA LOGO MERCHANDISE SALES | 2,000 | - | (2,000) | -100% | 2,039 | - |
| | 44350 | RECOVERY OF DISCIPLINE COSTS | 65,000 | 60,000 | (5,000) | -8% | 49,963 | 36,441 |
| | 44450 | DISCIPLINE HISTORY SUMMARY | 19,000 | 21,000 | 2,000 | 11% | 21,317 | 11,940 |
| | 44820 | CPF RESTITUTION | 10,000 | 10,000 | - | 0% | 20,766 | 3,352 |
| | 44840 | CPF MEMBER ASSESSMENTS | 735,480 | - | (735,480) | -100% | 732,050 | 711,290 |
| | 45040 | MEMBER CONTACT INFORMATION | 5,000 | 5,000 | - | 0% | 4,773 | 4,055 |
| | 45060 | PHOTO BAR CARD SALES | 260 | 300 | 40 | 15% | 648 | 324 |
| | 45110 | LPO EXAMINATION FEES | 16,000 | 18,000 | 2,000 | 13% | 13,100 | 10,700 |
| | 45115 | LPO EXAM LATE FEES | 2,000 | 2,000 | - | 0% | 1,600 | 1,400 |
| | 45120 | LPO LICENSE FEES | 158,000 | 154,000 | (4,000) | -3% | 155,249 | 74,080 |
| | 45125 | LPO LATE LICENSE FEES | 2,000 | 3,000 | 1,000 | 50% | 3,750 | 3,450 |
| | 45210 | ACTIVITY APPLICATION FEE | 670,000 | 700,000 | 30,000 | 4% | 708,300 | 344,400 |
| | 45215 | ACTIVITY APPLICATION LATE FEE | 250,000 | 260,000 | 10,000 | 4% | 268,800 | 129,500 |
| | 45220 | MCLE LATE FEES | 235,150 | 253,150 | 18,000 | 8% | 258,050 | 244,825 |
| | 45230 | ANNUAL ACCREDITED SPONSOR FEES | 36,250 | 36,750 | 500 | 1% | 40,000 | 36,250 |
| | 45250 | ATTENDANCE LATE FEES | 120,000 | 116,000 | (4,000) | -3% | 104,200 | 55,500 |
| | 45255 | COMITY CERTIFICATES - REQUEST | 13,000 | 13,000 | - | 0% | 14,175 | 9,825 |
| | 45260 | COMITY CERTIFICATES - SUBMIT | 17,000 | 17,000 | - | 0% | 19,700 | 16,450 |
| | 47100 | TRIAL ADVOCACY PROGRAM | 12,000 | 13,000 | 1,000 | 8% | 13,369 | (149) |
| | 48010 | REIMBURSEMENTS FROM SECTIONS | 275,000 | 275,000 | - | 0% | 276,103 | 388,434 |
| | 48200 | SECTION DUES REVENUE | 341,573 | - | (341,573) | -100% | 435,406 | 481,596 |
| | 48225 | FISCAL/MEMBERSHIP YEAR ADJUSTMENT | 109,570 | - | (109,570) | -100% | (2,543) | 144,288 |
| | | **Total Revenue** | **26,681,199** | **26,085,078** | **(596,121)** | **-2%** | **26,939,391** | **15,338,446** |
| Direct | 50015 | DEPRECIATION | 37,278 | 40,280 | 3,002 | 8% | 10,792 | 17,448 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| **50020** | BANK FEES | 500 | 500 | - | 0% | (3,317) | (94) |
| **50033** | CONSULTING SERVICES | 1,052,147 | 967,500 | (84,647) | -8% | 342,246 | 398,689 |
| **50034** | IT EXPENSE DUE TO GF | 1,103 | - | (1,103) | -100% | - | 400 |
| **50037** | DONATIONS/SPONSORSHIPS/GRANTS | - | - | - | | 250,352 | (5,178) |
| **50050** | EQUIPMENT, HARDWARE & SOFTWARE | 2,635 | 3,317 | 682 | 26% | 2,635 | 1,318 |
| **50060** | POSTAGE | 142,900 | 168,700 | 25,800 | 18% | 146,521 | 86,754 |
| **50070** | PRINTING & COPYING | 245,000 | 244,800 | (200) | 0% | 219,750 | 132,182 |
| **50080** | PUBLICATIONS PRODUCTION | 350 | 350 | - | 0% | 122 | - |
| **50085** | NEW MEMBER LIAISON SECTION PROGRAM | 1,300 | 1,300 | - | 0% | 585 | 565 |
| **50095** | CLE COMPS | - | - | - | | 390 | - |
| **50100** | STAFF TRAVEL/PARKING | 103,271 | 126,436 | 23,165 | 22% | 72,936 | 33,552 |
| **50110** | STAFF CONFERENCE & TRAINING | 169,850 | 175,200 | 5,350 | 3% | 101,485 | 59,342 |
| **50120** | STAFF MEMBERSHIP DUES | 23,403 | 24,091 | 688 | 3% | 17,313 | 16,337 |
| **50125** | TASK FORCE EXPENSES | - | - | - | | - | - |
| **50130** | SUBSCRIPTIONS | 13,242 | 21,262 | 8,020 | 61% | 8,120 | 5,360 |
| **50135** | TRANSCRIPTION SERVICES | - | - | - | | - | - |
| **50140** | SUPPLIES | 6,365 | 6,350 | (15) | 0% | 6,870 | 1,446 |
| **50145** | SURVEYS | - | 20,000 | 20,000 | | - | - |
| **50155** | DIGITAL/ONLINE DEVELOPMENT | 2,000 | 2,287 | 287 | 14% | 903 | 21 |
| **50160** | TELEPHONE | 93,575 | 98,575 | 5,000 | 5% | 94,685 | 48,448 |
| **50165** | CONFERENCE CALLS | 1,660 | - | (1,660) | -100% | 568 | 113 |
| **50185** | MEETING EXPENSE | 2,000 | - | (2,000) | -100% | 2,098 | - |
| **52110** | PRO BONO & PUBLIC SERVICE COMMITTEE | 3,500 | 7,500 | 4,000 | 114% | 2,361 | 1,882 |
| **52121** | ATJ BOARD RETREAT | 6,000 | 4,000 | (2,000) | -33% | 5,181 | - |
| **52125** | LEADERSHIP TRAINING | 45,000 | 34,000 | (11,000) | -24% | 30,955 | 3,450 |
| **52140** | ATJ BOARD EXPENSE | 51,900 | 48,000 | (3,900) | -8% | 55,193 | 4,659 |
| **52210** | FACILITY, PARKING, FOOD | 160,485 | 155,200 | (5,285) | -3% | 149,983 | 49,665 |
| **52215** | EXAM GRADING | 43,750 | 73,400 | 29,650 | 68% | 42,750 | 21,750 |
| **52221** | UBE EXAMINATIONS | 46,200 | 1,000 | (45,200) | -98% | 144,408 | 40,859 |
| **52225** | BOARD OF BAR EXAMINERS | 45,000 | 50,000 | 5,000 | 11% | 20,372 | 6,235 |
| **52230** | BAR EXAM PROCTORS | 10,000 | 14,400 | 4,400 | 44% | 19,674 | 8,486 |
| **52235** | CHARACTER & FITNESS BOARD EXP | 12,000 | 15,000 | 3,000 | 25% | 11,065 | 5,139 |
| **52240** | DISABILITY ACCOMMODATIONS | 86,500 | 101,500 | 15,000 | 17% | 76,184 | 47,694 |
| **52245** | CHARACTER & FITNESS INVESTI | 1,600 | 1,600 | - | 0% | 1,225 | - |
| **52246** | INVESTIGATION | 9,900 | 7,980 | (1,920) | -19% | - | - |
| **52250** | LAW SCHOOL VISITS | 1,500 | 1,500 | - | 0% | 21 | 23 |
| **52255** | LAW CLERK BOARD | 9,000 | 6,000 | (3,000) | -33% | 5,950 | 5,122 |
| **52258** | LAW CLERK OUTREACH | 20,000 | 15,000 | (5,000) | -25% | 11,025 | 13,705 |
| **52270** | DEPRECIATION-SOFTWARE | - | - | - | | - | - |
| **52511** | BAR LEADERS SUMMIT | 35,000 | 35,700 | 700 | 2% | 33,963 | - |
| **52520** | ABA DELEGATES | 18,000 | 16,000 | (2,000) | -11% | 12,947 | 6,876 |
| **52521** | VOLUNTEER RECOGNITION | 2,000 | 2,000 | - | 0% | 39 | 660 |
| **52522** | WSBA REPRESENTATIVE | - | 500 | 500 | | - | - |
| **52540** | SECTION/COMMITTEE CHAIR MTGS | 500 | 400 | (100) | -20% | 89 | 71 |
| **52570** | APEX | 52,500 | 60,000 | 7,500 | 14% | 57,594 | 380 |
| **52573** | 50 YEAR MEMBER TRIBUTE LUNCH | 38,000 | 44,913 | 6,913 | 18% | 29,644 | - |
| **52585** | WASHINGTON LEADERSHIP INSTITUTE | 100,000 | 100,000 | - | 0% | 100,000 | 100,000 |
| **52590** | BAR LEADERS CONFERENCE | - | - | - | | - | - |
| **52660** | JUD RECOMMEND COMMITTEE | 3,250 | 3,250 | - | 0% | 1,675 | 1,096 |
| **52680** | DEI COUNCIL | 7,600 | 5,600 | (2,000) | -26% | 4,323 | 1,917 |
| **52681** | DIVERSITY EVENTS & PROJECTS | 33,600 | 43,300 | 9,700 | 29% | 14,329 | 5,091 |
| **52683** | LLLT BOARD | 9,000 | 9,000 | - | 0% | 2,702 | 1,304 |
| **52687** | STAFF EQUITY LEADERSHIP LAB | 6,000 | 7,500 | 1,500 | 25% | 2,039 | 2,949 |
| **52688** | EXAM WRITING | 15,000 | 15,000 | - | 0% | 8,400 | 4,200 |
| **52689** | LLLT EDUCATION | 1,000 | 500 | (500) | -50% | 35 | - |
| **52691** | OUTREACH EXPENSES | 10,000 | 10,000 | - | 0% | - | - |
| **52692** | OUTREACH & COMMUNICATION | 10,000 | 10,000 | - | 0% | - | - |
| **52710** | GRAPHICS/ARTWORK | 1,000 | 1,000 | - | 0% | 75 | - |
| **52750** | EDITORIAL ADVIS COMMITTEE EXP | 300 | 300 | - | 0% | - | - |
| **52810** | BOG MEETINGS | 175,000 | 160,000 | (15,000) | -9% | 148,846 | 46,003 |
| **52812** | NEW GOVERNOR ORIENTATION | 7,000 | 5,000 | (2,000) | -29% | 249 | - |
| **52820** | BOG COMMITTEES' EXPENSES | 11,200 | 10,000 | (1,200) | -11% | 4,786 | 2,305 |
| **52821** | BOG RETREAT | 40,000 | 40,000 | - | 0% | 43,964 | 31,539 |
| **52822** | BOG CONFERENCE ATTENDANCE | 56,500 | 48,000 | (8,500) | -15% | 37,343 | 16,727 |
| **52823** | PRESIDENT'S PHOTO | 3,300 | 3,300 | - | 0% | 1,966 | - |
| **52830** | BOG TRAVEL & OUTREACH | 70,000 | 52,000 | (18,000) | -26% | 41,245 | 42,518 |
| **52840** | ED TRAVEL & OUTREACH | 6,000 | 6,000 | - | 0% | 4,883 | 3,010 |
| **52874** | PUBLIC DEFENSE | 11,000 | 26,500 | 15,500 | 141% | 2,279 | 4,106 |
| **52878** | COMMUNICATIONS OUTREACH | 8,000 | 15,600 | 7,600 | 95% | 12,049 | 2,814 |
| **52880** | BOG ELECTIONS | 26,900 | 25,000 | (1,900) | -7% | 16,298 | - |
| **52891** | LONG RANGE STRATEGIC PLANNING COUNC | - | - | - | | - | - |
| **52940** | BOARD OF TRUSTEES | 3,600 | 7,000 | 3,400 | 94% | 3,593 | 100 |
| **52960** | PRESIDENT'S DINNER | 12,000 | 13,000 | 1,000 | 8% | 10,869 | - |
| **53210** | COST OF SALES - DESKBOOKS | 2,800 | - | (2,800) | -100% | 2,453 | 1,195 |
| **53220** | COST OF SALES - COURSEBOOKS | 300 | - | (300) | -100% | 69 | 27 |
| **53225** | COST OF SALES - SECTION PUBLIC | - | - | - | | (74) | - |
| **53250** | A/V DEVELOP COSTS (RECORDING) | - | - | - | | - | - |
| **53260** | OBSOLETE INVENTORY | 118,700 | - | (118,700) | -100% | 48,248 | 65,597 |
| **53255** | CLE-EQUIP-DEPRECIATION | - | - | - | | 2,039 | - |
| **53265** | SPLITS TO SECTIONS | - | - | - | | - | - |
| **53270** | DESKBOOK ROYALTIES | - | - | - | | - | 193 |
| **53280** | ONLINE EXPENSES | - | - | - | | - | - |
| **53282** | SOFTWARE HOSTING | 91,457 | 102,760 | 11,303 | 12% | 69,208 | 42,792 |
| **53283** | ON24 OVERAGE CHARGE | 4,500 | 4,500 | - | 0% | 4,414 | 4,422 |
| **53285** | ONLINE PRODUCT HOSTING EXPENSES | 54,000 | 30,000 | (24,000) | -44% | 47,861 | 17,851 |
| **53320** | POSTAGE & DELIVERY-DESKBOOKS | 300 | 300 | - | 0% | - | 21 |
| **53330** | POSTAGE & DELIVRY-COURSEBOOKS | 200 | - | (200) | -100% | 59 | 28 |
| **53610** | COURSEBOOK PRODUCTION | 150 | 150 | - | 0% | - | - |
| **53620** | POSTAGE - FLIERS/CATALOGS | - | - | - | | - | - |
| **53640** | ACCREDITATION FEES | 2,500 | 2,250 | (250) | -10% | 1,752 | 2,040 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| **53660** | SEMINAR BROCHURES | - | - | - | | - | - |
| **53690** | FACILITIES | 175,000 | 189,900 | 14,900 | 9% | 164,373 | 47,107 |
| **53700** | SPEAKERS & PROGRAM DEVELOP | 45,800 | 49,300 | 3,500 | 8% | 25,859 | 6,666 |
| **53730** | HONORARIUM | 4,500 | 4,500 | - | 0% | - | - |
| **53731** | INSURANCE REBATE | - | - | - | | (980) | - |
| **53740** | CLE SEMINAR COMMITTEE | 200 | - | (200) | -100% | - | - |
| **54026** | IMAGE LIBRARY | 4,800 | 4,800 | - | 0% | 4,756 | 4,756 |
| **54027** | BAR OUTREACH | 22,000 | 20,000 | (2,000) | -9% | 16,256 | 15,730 |
| **54065** | AMBASSADOR TRAINING & TOWN HALLS | 10,000 | 10,000 | - | 0% | - | - |
| **54130** | PRO BONO OUTREACH | 4,000 | 6,000 | 2,000 | 50% | 2,127 | - |
| **54310** | COURT REPORTERS | 110,350 | 97,000 | (13,350) | -12% | 80,877 | 54,131 |
| **54320** | OUTSIDE COUNSEL EXPENSES | 500 | 500 | - | 0% | - | - |
| **54360** | LITIGATION EXPENSES | 31,000 | 25,500 | (5,500) | -18% | 12,748 | 7,710 |
| **54370** | DISABILITY EXPENSES | 15,000 | 17,000 | 2,000 | 13% | 8,427 | 4,696 |
| **54391** | LAW LIBRARY DESKBOOK ACCESS | 10,000 | - | (10,000) | -100% | 9,311 | - |
| **54400** | TRANSLATION SERVICES | 10,000 | 28,000 | 18,000 | 180% | 4,376 | 8,190 |
| **54430** | PRACTICE MONITOR EXPENSES | - | - | - | | - | - |
| **54512** | STAFF TRAINING- GENERAL | 29,300 | 18,000 | (11,300) | -39% | 4,971 | 3,764 |
| **54520** | RECRUITING AND ADVERTISING | 8,750 | 8,750 | - | 0% | 5,013 | 1,778 |
| **54530** | HR INFORMATION SYSTEM | 65,950 | 60,000 | (5,950) | -9% | 50,000 | 34,975 |
| **54540** | SALARY SURVEYS | 3,000 | 1,000 | (2,000) | -67% | - | 934 |
| **54590** | TRANSFER TO INDIRECT EXPENSE | (115,700) | (95,550) | 20,150 | -17% | (62,998) | (46,168) |
| **54610** | LIBRARY MATERIALS/RESOURCES | 4,000 | 4,000 | - | 0% | 1,532 | 292 |
| **54645** | LEGAL TECH TASK FORCE | 3,500 | - | (3,500) | -100% | 2,750 | - |
| **54715** | MEMBER WELL-BEING TASK FORCE | 4,500 | - | (4,500) | -100% | 2,542 | 39 |
| **54810** | GIFTS TO INJURED CLIENTS | 500,000 | 500,000 | - | 0% | 249,483 | 15,700 |
| **54820** | CPF BOARD | 2,000 | 1,500 | (500) | -25% | 553 | 864 |
| **54910** | RENT - OLYMPIA OFFICE | - | - | - | | - | - |
| **54920** | CONTRACT LOBBYIST | 12,500 | 15,000 | 2,500 | 20% | 15,000 | 9,375 |
| **54940** | LEGISLATIVE COMMITTEE | 1,250 | 1,250 | - | 0% | 130 | - |
| **54970** | BOG LEGISLATIVE COMMITTEE | 300 | 300 | - | 0% | - | - |
| **55010** | LICENSING FORMS | - | - | - | | - | - |
| **55110** | LPO EXAM FACILITIES | - | - | - | | - | - |
| **55130** | LPO BOARD EXPENSES | 4,000 | 4,000 | - | 0% | 1,277 | 267 |
| **55165** | LPO OUTREACH | 500 | 500 | - | 0% | - | - |
| **55210** | MCLE BOARD EXPENSES | 6,000 | 3,000 | (3,000) | -50% | 1,806 | 531 |
| **55220** | DEPRECIATION-SOFTWARE | 142,057 | 142,057 | 0 | 0% | 144,144 | 72,072 |
| **55250** | VLEX FASTCASE | 87,000 | 90,000 | 3,000 | 3% | 84,568 | 87,812 |
| **55265** | SPEAKERS & PROGRAM DEVELOPMENT | 500 | 500 | - | 0% | 106 | - |
| **55266** | NEW MEMBER OUTREACH EVENTS | 5,000 | 18,500 | 13,500 | 270% | 4,807 | 938 |
| **55270** | WASHINGTON NEW MEMBERS COMMITTEE | 15,000 | 30,500 | 15,500 | 103% | 5,587 | 8,581 |
| **55285** | OPEN SECTIONS NIGHT | - | - | - | | - | - |
| **55310** | DISCIPLINARY BOARD EXPENSES | 3,000 | 3,000 | - | 0% | 1,548 | - |
| **55320** | CHIEF HEARING OFFICER | 41,200 | 41,200 | - | 0% | 39,996 | 19,998 |
| **55330** | HEARING OFFICER EXPENSES | 4,000 | 2,500 | (1,500) | -38% | 377 | 149 |
| **55340** | HEARING OFFICER TRAINING | 1,000 | 2,500 | 1,500 | 150% | - | 900 |
| **55370** | APPOINTED COUNSEL | 50,645 | 52,200 | 1,555 | 3% | 50,400 | 25,270 |
| **55380** | DISCIPLINARY SELECTION PANEL | 1,000 | 500 | (500) | -50% | - | - |
| **55419** | COURT RULES COMMITTEE | 1,000 | 1,000 | - | 0% | - | - |
| **55510** | PRACTICE OF LAW BOARD | 16,000 | 3,000 | (13,000) | -81% | 740 | 197 |
| **55555** | NEW EXPENSE ACCOUNT NEEDED | - | - | - | | - | - |
| **55610** | CPE COMMITTEE | 1,000 | 1,000 | - | 0% | 286 | - |
| **55615** | WILLS | 1,000 | 1,000 | - | 0% | - | - |
| **55620** | CUSTODIANSHIP | 5,000 | 2,500 | (2,500) | -50% | 201 | 301 |
| **55970** | MEMBER ENGAGEMENT COUNCIL | 500 | 500 | - | 0% | - | - |
| **55980** | SMALL TOWN AND RURAL COUNCIL | 7,500 | 7,500 | - | 0% | 1,586 | - |
| **55981** | SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES | 70,000 | 55,000 | (15,000) | -21% | 61,910 | 3,000 |
| **55911** | CLOUD INFRASTRUCTURE | 130,000 | 130,000 | - | 0% | 66,849 | 25,643 |
| **55995** | BENCH-BAR-PRESS LUNCHEON | - | - | - | | - | 4,935 |
| **56100** | COMPUTER HARDWARE | 65,000 | 80,000 | 15,000 | 23% | 66,055 | 41,040 |
| **56150** | COMPUTER SOFTWARE | 518,000 | 476,000 | (42,000) | -8% | 362,082 | 249,256 |
| **56225** | HARDWARE SERVICE & WARRANTIES | 50,000 | 50,000 | - | 0% | 41,848 | 14,413 |
| **56230** | SOFTWARE MAINT & LICENSING | 470,000 | 410,000 | (60,000) | -13% | 362,502 | 212,740 |
| **56500** | COMPUTER SUPPLIES | - | - | - | | - | - |
| **56550** | THIRD PARTY SERVICES | 177,600 | 180,000 | 2,400 | 1% | 97,718 | 104,166 |
| **56900** | TRANSFER TO INDIRECT EXPENSES | (2,527,807) | (2,355,300) | 172,507 | -7% | (1,409,992) | (1,080,926) |
| **57320** | TRIAL ADVOCACY EXPENSES | 3,200 | 3,500 | 300 | 9% | 2,432 | - |
| **57450** | REGULATORY SCHOOL | 10,000 | 6,000 | (4,000) | -40% | 7,767 | 5,286 |
| **57460** | LAW SCHOOL OUTREACH | 500 | 500 | - | 0% | - | 66 |
| **58125** | ANNUAL OR OTHER MEETING EXPENS | 27,200 | - | (27,200) | -100% | 12,693 | 3,000 |
| **58150** | ATTENDANCE AT BOG MEETINGS | 2,604 | - | (2,604) | -100% | 754 | - |
| **58175** | AWARDS | 6,460 | 1,000 | (5,460) | -85% | 2,163 | 230 |
| **58200** | BREAKFAST/LUNCH/DINNER MTG EXP | 1,500 | - | (1,500) | -100% | - | - |
| **58225** | CONFERENCE/INSTITUTE EXPENSE | - | 54,000 | 54,000 | | 124,626 | - |
| **58300** | EXECUTIVE COMMITTEE EXPENSES | 57,645 | - | (57,645) | -100% | 27,211 | 22,470 |
| **58305** | EXECUTIVE COMM EXP - OTHER | 76,000 | - | (76,000) | -100% | 72,387 | 4,047 |
| **58315** | HONORARIUM | 4,500 | - | (4,500) | -100% | - | - |
| **58325** | LDSHIP/PROF DEVELOP/RETREATS | 107,860 | - | (107,860) | -100% | 51,341 | 53,640 |
| **58326** | LEGISLATIVE/LOBBYING | 2,500 | - | (2,500) | -100% | - | - |
| **58350** | MEMBERSHIP & RECRUITING EXP | 44,720 | - | (44,720) | -100% | 17,325 | 2,726 |
| **58375** | NEWSLETTER/PUBLICATION EXPENSE | 20,000 | - | (20,000) | -100% | 5,362 | 3,701 |
| **58400** | PER MEMBER CHARGE | 210,431 | - | (210,431) | -100% | 276,344 | 296,400 |
| **58415** | FISCAL/MEMBERSHIP YEAR ADJUSTMENT | 70,108 | - | (70,108) | -100% | (242) | 92,034 |
| **58450** | RECEPTION/FORUM EXPENSE | 69,890 | 25,000 | (44,890) | -64% | 24,698 | 11,232 |
| **58500** | NEW MEMBER OUTREACH | 5,220 | - | (5,220) | -100% | 1,068 | - |
| **58525** | SCHOLARSHIPS/DONATIONS/GRANT | 211,700 | 4,000 | (207,700) | -98% | 152,901 | 6,000 |
| **58550** | SECTION COMMITTEE EXPENSE | 6,000 | - | (6,000) | -100% | 4,155 | 6,026 |
| **58600** | SECTION SPECIAL PROJECTS | 9,550 | - | (9,550) | -100% | 300 | 1,500 |
| **58615** | LAW SCHOOL OUTREACH | 26,510 | - | (26,510) | -100% | 4,088 | 500 |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | **58620** | MINI-CLE EXPENSE | 45,983 | - | (45,983) | -100% | 13,809 | 2,820 |
| | **58625** | SEMINAR EXPENSE - SECTIONS | 97,500 | - | (97,500) | -100% | 13,537 | 11,481 |
| | **58675** | WEBSITE EXPENSES | 11,880 | - | (11,880) | -100% | 3,376 | 4,722 |
| | **58680** | ELECTIONS | - | - | - | | - | - |
| | **58750** | SEMINAR SCHOLARSHIPS | 5,500 | - | (5,500) | -100% | 1,340 | 1,392 |
| | | **Total Direct Expenses** | **4,942,227** | **3,847,257** | **(1,094,969)** | **-22%** | **4,026,596** | **1,904,296** |
| | | | | | - | | | |
| **Indirect** | **51110** | SALARIES | 14,130,725 | 14,860,838 | 730,113 | 5% | 14,084,308 | 6,995,854 |
| | **51120** | BUDGETED TEMPORARY EMPLOYEES | 212,850 | 166,668 | (46,182) | -22% | 227,350 | 85,716 |
| | **51121** | UNANTICIPATED TEMPS | - | - | - | | 11,970 | - |
| | **51122** | STAFF REPLACEMENT TEMPS | - | - | - | | 176,243 | - |
| | **51115** | SEVERANCE PAY | - | - | - | | 101,712 | - |
| | **51126** | EMPLOYEE PLACEMENT FEES | - | - | - | | 24,773 | - |
| | **51130** | VACATION & COMP TIME ACCRUALS | - | - | - | | 42,391 | 103,071 |
| | **51199** | SALARY EXPENSE | | | - | | - | - |
| | **51210** | EMPLOYEE ASSISTANCE PLAN | 4,800 | 4,800 | 0 | 0% | 4,800 | 2,400 |
| | **51220** | EMPLOYEE SERVICE AWARDS | 2,260 | 2,090 | (170) | -8% | 2,530 | 60 |
| | **51230** | FICA (EMPLOYER PORTION) | 1,067,890 | 1,122,512 | 54,623 | 5% | 1,074,861 | 522,305 |
| | **51240** | L&I INSURANCE | 65,406 | 72,135 | 6,728 | 10% | 58,255 | 29,051 |
| | **51245** | WA STATE FAMILY MEDICAL LEAVE (ER POR | 38,961 | 52,178 | 13,217 | 34% | 35,664 | 20,373 |
| | **51250** | MEDICAL (EMPLOYER PORTION) | 1,959,293 | 2,450,545 | 491,252 | 25% | 2,074,232 | 1,089,424 |
| | **51270** | RETIREMENT (EMPLOYER PORTION) | 778,534 | 792,765 | 14,230 | 2% | 1,145,337 | 388,282 |
| | **51280** | TRANSPORTATION ALLOWANCE | 25,944 | 40,200 | 14,256 | 55% | 25,482 | 26,321 |
| | **51290** | UNEMPLOYMENT INSURANCE | 73,419 | 94,603 | 21,184 | 29% | 70,438 | 37,303 |
| | **51299** | BENEFITS EXPENSE | | | - | | - | - |
| | **51310** | WORKPLACE BENEFITS | 60,150 | 77,200 | 17,050 | 28% | 62,532 | 11,410 |
| | **51340** | HUMAN RESOURCES POOLED EXP | 115,700 | 95,550 | (20,150) | -17% | 62,998 | 46,168 |
| | **51405** | MEETING SUPPORT EXPENSES | 9,950 | 12,720 | 2,770 | 28% | 9,141 | 3,200 |
| | **51409** | RENT EXPENSE | - | - | | | 897,893 | 448,947 |
| | **51410** | RENT | 923,055 | 990,000 | 66,945 | 7% | 93,764 | 43,313 |
| | **51411** | MOVE/DOWNSIZING EXPENSES | - | - | - | | 24,906 | - |
| | **51413** | RENT - CONFERENCE CENTER | - | - | | | (31,800) | (11,400) |
| | **51420** | PERSONAL PROP TAXES-WSBA | 6,500 | 6,100 | (400) | -6% | 7,190 | 3,399 |
| | **51430** | FURNITURE, MAINT, LH IMP | 48,450 | 44,650 | (3,800) | -8% | 49,748 | 17,206 |
| | **51435** | SAFETY & SECURITY | 10,420 | 10,420 | 0 | 0% | - | 1,053 |
| | **51440** | OFFICE SUPPLIES & EQUIP | 19,635 | 19,400 | (235) | -1% | 16,272 | 7,636 |
| | **51450** | FURN, LH IMP, & OFFICE EQUIP DEPREC | 224,084 | 145,806 | (78,278) | -35% | 142,128 | 111,586 |
| | **51470** | COMPUTER HARDWARE DEPREC | 47,971 | 78,249 | 30,277 | 63% | 45,556 | 25,997 |
| | **51480** | COMPUTER SOFTWARE DEPREC | 36,319 | 2,606 | (33,713) | -93% | 47,391 | 21,190 |
| | **51500** | INSURANCE | 273,491 | 287,500 | 14,009 | 5% | 261,653 | 133,027 |
| | **51501** | WORK HOME FURNITURE & EQUIP | 10,500 | 7,000 | (3,500) | -33% | 4,827 | 1,666 |
| | **51505** | PROFESSIONAL FEES-AUDIT | 43,500 | 45,500 | 2,000 | 5% | 36,577 | 41,695 |
| | **51510** | PROFESSIONAL FEES- LEGAL | 250,000 | 250,000 | 0 | 0% | 166,087 | 35,221 |
| | **51512** | ONLINE LEGAL RESEARCH | 89,000 | 89,500 | 500 | 1% | 83,843 | 45,223 |
| | **51513** | ACCOMMODATIONS FUND | 6,500 | 6,500 | 0 | 0% | - | - |
| | **51514** | TRANSLATION SERVICES | 25,000 | 37,650 | 12,650 | 51% | 5,976 | 3,804 |
| | **51515** | TELEPHONE & INTERNET | 33,600 | 32,640 | (960) | -3% | 32,670 | 16,140 |
| | **51520** | POSTAGE - GENERAL | 12,000 | 7,400 | (4,600) | -38% | 7,469 | 4,024 |
| | **51525** | RECORDS MANAGEMENT | 7,500 | 7,000 | (500) | -7% | 28,584 | - |
| | **51530** | BANK FEES ( INDIRECT) | 27,000 | 25,000 | (2,000) | -7% | 7,404 | 15,017 |
| | **51620** | PRODUCTION MAINT & SUPPLIES | 13,250 | 12,430 | (820) | -6% | 11,835 | 6,271 |
| | **51710** | COMPUTER POOLED EXPENSES | 2,527,807 | 2,355,300 | (172,507) | -7% | 1,409,992 | 1,080,526 |
| | **51810** | GAIN (LOSS) ON ASSETS | - | - | | | 1,396 | - |
| | **51925** | ALLOWANCE FOR OPEN POSITIONS | (200,000) | (200,000) | - | 0% | - | - |
| | **51955** | CAPITAL LABOR & OVERHEAD | - | - | - | | (104,685) | (16,181) |
| | **51900** | OTHER INDIRECT EXPENSE | | | - | | - | - |
| | **51935** | INSURANCE REBATE | - | - | - | | (11,679) | - |
| | | **TOTAL INDIRECT EXPENSES:** | **22,981,465** | **24,105,454** | **1,123,989** | **5%** | **22,530,014** | **11,396,299** |
| | | **TOTAL ALL EXPENSES:** | **27,923,692** | **27,952,711** | **29,020** | **0%** | **26,556,610** | **13,300,596** |
| | | **NET INCOME (LOSS):** | **(1,242,493)** | **(1,867,633)** | **(625,140)** | **50%** | **382,781** | **2,037,850** |

## Washington State Bar Association
### Budget Comparison

## INDIRECT EXPENSES

**Cost Center** **FY27 FTE** **143.90**
**All** **FY26 FTE** **141.50**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **INDIRECT** | **51110** | SALARIES | 14,130,725 | 14,860,838 | 730,113 | 5% | 14,084,308 | 6,995,854 |
| | **51120** | BUDGETED TEMPORARY EMPLOYEES | 212,850 | 166,668 | (46,182) | -22% | 227,350 | 85,716 |
| | **51121** | UNANTICIPATED TEMPS | - | - | - | | 11,970 | - |
| | **51122** | STAFF REPLACEMENT TEMPS | - | - | | | 176,243 | - |
| | **51115** | SEVERANCE PAY | - | - | | | 101,712 | |
| | **51126** | EMPLOYEE PLACEMENT FEES | - | - | | | 24,773 | - |
| | **51130** | VACATION & COMP TIME ACCRUALS | - | - | | | 42,391 | 103,071 |
| | **51925** | ALLOWANCE FOR OPEN POSITIONS | (200,000) | (200,000) | - | 0% | - | - |
| | **51935** | INSURANCE REBATE | - | - | - | | (11,679) | - |
| | **51955** | CAPITAL LABOR & OVERHEAD | - | - | - | | (104,685) | (16,181) |
| | **51199** | **SALARY EXPENSE** | **14,143,575** | **14,827,506** | **683,931** | **5%** | **14,552,383** | **7,168,460** |
| | **51210** | EMPLOYEE ASSISTANCE PLAN | 4,800 | 4,800 | 0 | 0% | 4,800 | 2,400 |
| | **51220** | EMPLOYEE SERVICE AWARDS | 2,260 | 2,090 | (170) | -8% | 2,530 | 60 |
| | **51230** | FICA (EMPLOYER PORTION) | 1,067,890 | 1,122,512 | 54,623 | 5% | 1,074,861 | 522,305 |
| | **51240** | L&I INSURANCE | 65,406 | 72,135 | 6,728 | 10% | 58,255 | 29,051 |
| | **51245** | WA STATE FAMILY MEDICAL LEAVE (ER PORTION) | 38,961 | 52,178 | 13,217 | 34% | 35,664 | 20,373 |
| | **51250** | MEDICAL (EMPLOYER PORTION) | 1,959,293 | 2,450,545 | 491,252 | 25% | 2,074,232 | 1,089,424 |
| | **51270** | RETIREMENT (EMPLOYER PORTION) | 778,534 | 792,765 | 14,230 | 2% | 1,145,337 | 388,282 |
| | **51280** | TRANSPORTATION ALLOWANCE | 25,944 | 40,200 | 14,256 | 55% | 25,482 | 26,321 |
| | **51290** | UNEMPLOYMENT INSURANCE | 73,419 | 94,603 | 21,184 | 29% | 70,438 | 37,303 |
| | **51299** | **BENEFITS EXPENSE** | **4,016,507** | **4,631,827** | **615,320** | **15%** | **4,491,600** | **2,115,520** |
| | **51310** | WORKPLACE BENEFITS | 60,150 | 77,200 | 17,050 | 28% | 62,532 | 11,410 |
| | **51340** | HUMAN RESOURCES POOLED EXP | 115,700 | 95,550 | (20,150) | -17% | 62,998 | 46,168 |
| | **51405** | MEETING SUPPORT EXPENSES | 9,950 | 12,720 | 2,770 | 28% | 9,141 | 3,200 |
| | **51409** | RENT EXPENSE | - | - | | | 897,893 | 448,947 |
| | **51410** | RENT | 923,055 | 990,000 | 66,945 | 7% | 93,764 | 43,313 |
| | **51411** | MOVE/DOWNSIZING EXPENSES | - | - | - | | 24,906 | - |
| | **51413** | RENT - CONFERENCE CENTER | - | - | | | (31,800) | (11,400) |
| | **51420** | PERSONAL PROP TAXES-WSBA | 6,500 | 6,100 | (400) | -6% | 7,190 | 3,399 |
| | **51430** | FURNITURE, MAINT, LH IMP | 48,450 | 44,650 | (3,800) | -8% | 49,748 | 17,206 |
| | **51435** | SAFETY & SECURITY | 10,420 | 10,420 | 0 | 0% | - | 1,053 |
| | **51440** | OFFICE SUPPLIES & EQUIP | 19,635 | 19,400 | (235) | -1% | 16,272 | 7,636 |
| | **51450** | FURN, LH IMP, & OFFICE EQUIP DEPREC | 224,084 | 145,806 | (78,278) | -35% | 142,128 | 111,586 |
| | **51470** | COMPUTER HARDWARE DEPREC | 47,971 | 78,249 | 30,277 | 63% | 45,556 | 25,997 |
| | **51480** | COMPUTER SOFTWARE DEPREC | 36,319 | 2,606 | (33,713) | -93% | 47,391 | 21,190 |
| | **51500** | INSURANCE | 273,491 | 287,500 | 14,009 | 5% | 261,653 | 133,027 |
| | **51501** | WORK HOME FURNITURE & EQUIP | 10,500 | 7,000 | (3,500) | -33% | 4,827 | 1,666 |
| | **51505** | PROFESSIONAL FEES-AUDIT | 43,500 | 45,500 | 2,000 | 5% | 36,577 | 41,695 |
| | **51510** | PROFESSIONAL FEES- LEGAL | 250,000 | 250,000 | - | 0% | 166,087 | 35,221 |
| | **51512** | ONLINE LEGAL RESEARCH | 89,000 | 89,500 | 500 | 1% | 83,843 | 45,223 |
| | **51513** | ACCOMMODATIONS FUND | 6,500 | 6,500 | - | 0% | - | - |
| | **51514** | TRANSLATION SERVICES | 25,000 | 37,650 | 12,650 | 51% | 5,976 | 3,804 |
| | **51515** | TELEPHONE & INTERNET | 33,600 | 32,640 | (960) | -3% | 32,670 | 16,140 |
| | **51520** | POSTAGE - GENERAL | 12,000 | 7,400 | (4,600) | -38% | 7,469 | 4,024 |
| | **51525** | RECORDS MANAGEMENT | 7,500 | 7,000 | (500) | -7% | 28,584 | - |
| | **51530** | BANK FEES ( INDIRECT) | 27,000 | 25,000 | (2,000) | -7% | 7,404 | 15,017 |
| | **51620** | PRODUCTION MAINT & SUPPLIES | 13,250 | 12,430 | (820) | -6% | 11,835 | 6,271 |
| | **51710** | COMPUTER POOLED EXPENSES | 2,527,807 | 2,355,300 | (172,507) | -7% | 1,409,992 | 1,080,526 |
| | **51810** | GAIN (LOSS) ON ASSETS | - | - | - | | 1,396 | - |
| | **51900** | **OTHER INDIRECT EXPENSE** | **4,821,383** | **4,646,121** | **(175,262)** | -4% | **3,486,031** | **2,112,319** |
| | | **TOTAL INDIRECT EXPENSES:** | **22,981,465** | **24,105,454** | **1,123,989** | **5%** | **22,530,014** | **11,396,299** |

## Washington State Bar Association
### Budget Comparison

**ACCESS TO JUSTICE**

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **1.67** |
| **ATJ** | **FY26 FTE** | **1.61** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **41700** | CONFERENCES & INSTITUTES | - | - | | | 94,628 | - |
| | **TOTAL REVENUE** | | **-** | **-** | **-** | | **94,628** | **-** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 2,800 | 11,000 | 8,200 | 293% | 2,736 | 298 |
| | **50110** | STAFF CONFERENCE & TRAINING | 4,400 | 5,100 | 700 | 16% | 1,570 | 3,662 |
| | **52121** | ATJ BOARD RETREAT | 6,000 | 4,000 | (2,000) | -33% | 5,181 | - |
| | **52125** | LEADERSHIP TRAINING | 10,000 | 9,000 | (1,000) | -10% | 5,529 | 3,450 |
| | **52140** | ATJ BOARD EXPENSE | 51,900 | 48,000 | (3,900) | -8% | 55,193 | 4,659 |
| | **52874** | PUBLIC DEFENSE | 11,000 | 26,500 | 15,500 | 141% | 2,279 | 4,106 |
| | **58225** | CONFERENCE/INSTITUTE EXPENSE | - | 54,000 | 54,000 | | 124,626 | - |
| | **58450** | RECEPTION/FORUM EXPENSE | 30,000 | 24,000 | (6,000) | -20% | 22,092 | 10,701 |
| | **TOTAL DIRECT EXPENSES** | | **116,100** | **181,600** | **65,500** | **56%** | **219,206** | **26,876** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 152,635 | 160,030 | 7,395 | 5% | 157,349 | 74,953 |
| | **51299** | BENEFITS EXPENSE | 45,272 | 52,065 | 6,793 | 15% | 49,834 | 23,065 |
| | **51900** | OTHER INDIRECT EXPENSE | 55,440 | 53,920 | (1,520) | -3% | 39,221 | 24,452 |
| | **TOTAL INDIRECT EXPENSES:** | | **253,348** | **266,015** | **12,667** | **5%** | **246,405** | **122,471** |
| | **TOTAL ALL EXPENSES:** | | **369,448** | **447,615** | **78,167** | **21%** | **465,610** | **149,346** |
| | **NET INCOME (LOSS):** | | **(369,448)** | **(447,615)** | **(78,167)** | **21%** | **(370,982)** | **(149,346)** |

## Washington State Bar Association
### Budget Comparison

**ADMISSIONS**
**Cost Center** **FY27 FTE** 7.73
**ADMISS** **FY26 FTE** 7.45

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **40705** | EXAM SOFTWARE REVENUE | 9,500 | - | (9,500) | -100% | 32,820 | - |
| | **42207** | BAR EXAM FEES | 1,300,000 | 1,554,500 | 254,500 | 20% | 1,527,975 | 1,209,695 |
| | **42230** | BAR EXAM LATE FEES | 95,000 | 65,000 | (30,000) | -32% | 67,200 | 42,600 |
| | **42232** | HOUSE COUNSEL APPLICATION FEES | 55,000 | 45,000 | (10,000) | -18% | 56,490 | 18,430 |
| | **42236** | PORTFOLIO APPLICATION FEES | - | 148,000 | 148,000 | | - | - |
| | **42270** | RULE 9/LEGAL INTERN FEES | 13,000 | 31,800 | 18,800 | 145% | 16,400 | 2,650 |
| | **42285** | FOREIGN LAW CONSULTANT FEES | 1,940 | 1,940 | - | 0% | 2,910 | 970 |
| | **42287** | SPECIAL ADMISSIONS | 5,000 | 5,000 | - | 0% | 9,590 | 4,190 |
| | **TOTAL REVENUE** | | **1,479,440** | **1,851,240** | **371,800** | **25%** | **1,713,385** | **1,278,535** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50060** | POSTAGE | 2,900 | 3,700 | 800 | 28% | 2,881 | 2,020 |
| | **50100** | STAFF TRAVEL/PARKING | 24,000 | 25,000 | 1,000 | 4% | 23,654 | 9,139 |
| | **50110** | STAFF CONFERENCE & TRAINING | 11,000 | 11,000 | - | 0% | 7,040 | 5,354 |
| | **50120** | STAFF MEMBERSHIP DUES | 495 | 495 | - | 0% | 495 | 245 |
| | **50140** | SUPPLIES | 2,500 | 2,500 | - | 0% | 4,340 | 1,044 |
| | **52210** | FACILITY, PARKING, FOOD | 150,985 | 155,000 | 4,015 | 3% | 142,986 | 46,969 |
| | **52215** | EXAM GRADING | 43,750 | 68,000 | 24,250 | 55% | 42,750 | 21,750 |
| | **52221** | UBE EXAMINATIONS | 46,200 | 1,000 | (45,200) | -98% | 144,408 | 40,859 |
| | **52225** | BOARD OF BAR EXAMINERS | 45,000 | 50,000 | 5,000 | 11% | 20,372 | 6,235 |
| | **52230** | BAR EXAM PROCTORS | 10,000 | 14,400 | 4,400 | 44% | 19,674 | 8,486 |
| | **52240** | DISABILITY ACCOMMODATIONS | 75,000 | 90,000 | 15,000 | 20% | 75,023 | 45,424 |
| | **52245** | CHARACTER & FITNESS INVESTI | 1,500 | 1,500 | - | 0% | 1,225 | - |
| | **52250** | LAW SCHOOL VISITS | 1,500 | 1,500 | - | 0% | 21 | 23 |
| | **53282** | SOFTWARE HOSTING | 45,000 | 68,000 | 23,000 | 51% | 46,372 | 26,488 |
| | **TOTAL DIRECT EXPENSES** | | **459,830** | **492,095** | **32,265** | **7%** | **531,241** | **214,036** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 635,395 | 691,125 | 55,730 | 9% | 550,545 | 308,980 |
| | **51299** | BENEFITS EXPENSE | 198,059 | 230,465 | 32,406 | 16% | 183,678 | 104,302 |
| | **51900** | OTHER INDIRECT EXPENSE | 256,539 | 249,660 | (6,879) | -3% | 152,641 | 112,278 |
| | **TOTAL INDIRECT EXPENSES:** | | **1,089,992** | **1,171,250** | **81,258** | **7%** | **886,865** | **525,560** |
| | **TOTAL ALL EXPENSES:** | | **1,549,822** | **1,663,345** | **113,523** | **7%** | **1,418,106** | **739,596** |
| | **NET INCOME (LOSS):** | | **(70,382)** | **187,895** | **258,277** | **-367%** | **295,279** | **538,939** |

## Washington State Bar Association
### Budget Comparison

**ADVANCEMENT FTE**

| Cost Center | | |
|---|---|---|
| ADV FTE | FY27 FTE | 1.53 |
| | FY26 FTE | 1.41 |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50110** | STAFF CONFERENCE & TRAINING | 6,600 | 4,400 | (2,200) | -33% | 3,496 | 140 |
| | **TOTAL DIRECT EXPENSES** | | **6,600** | **4,400** | **(2,200)** | **-33%** | **3,496** | **140** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 216,525 | 233,499 | 16,974 | 8% | 261,531 | 110,065 |
| | **51299** | BENEFITS EXPENSE | 50,531 | 59,752 | 9,221 | 18% | 71,378 | 26,294 |
| | **51900** | OTHER INDIRECT EXPENSE | 48,553 | 49,399 | 846 | 2% | 46,366 | 21,300 |
| | **TOTAL INDIRECT EXPENSES:** | | **315,609** | **342,650** | **27,041** | **9%** | **379,274** | **157,658** |
| | **TOTAL ALL EXPENSES:** | | **322,209** | **347,050** | **24,841** | **8%** | **382,770** | **157,798** |
| | **NET INCOME (LOSS):** | | **(322,209)** | **(347,050)** | **(24,841)** | **8%** | **(382,770)** | **(157,798)** |

## Washington State Bar Association
### Budget Comparison

**BAR NEWS**
**Cost Center** **FY27 FTE** **2.13**
**BN** **FY26 FTE** **2.13**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **40900** | ROYALTIES | 2,000 | 2,000 | - | 0% | 1,753 | - |
| | **42710** | BNEWS DISPLAY ADVERTISING | 405,000 | 450,000 | 45,000 | 11% | 462,242 | 254,289 |
| | **42720** | BNEWS SUBSCRIPT/SINGLE ISSUES | 100 | 100 | - | 0% | 108 | 140 |
| | **42730** | BNEWS CLASSIFIED ADVERTISING | 2,500 | 2,500 | - | 0% | 4,952 | 2,773 |
| | **42760** | JOB TARGET ADVERSTISING | 120,000 | 180,000 | 60,000 | 50% | 107,157 | 60,340 |
| | **TOTAL REVENUE** | | **529,600** | **634,600** | **105,000** | **20%** | **576,212** | **317,543** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50060** | POSTAGE | 135,000 | 160,000 | 25,000 | 19% | 139,447 | 82,591 |
| | **50070** | PRINTING & COPYING | 242,000 | 242,000 | - | 0% | 217,863 | 130,615 |
| | **50110** | STAFF CONFERENCE & TRAINING | 2,200 | 2,200 | - | 0% | - | 999 |
| | **50120** | STAFF MEMBERSHIP DUES | 220 | 220 | - | 0% | 220 | - |
| | **50130** | SUBSCRIPTIONS | 225 | 225 | - | 0% | 204 | - |
| | **50155** | DIGITAL/ONLINE DEVELOPMENT | 2,000 | 2,000 | - | 0% | 903 | 21 |
| | **52710** | GRAPHICS/ARTWORK | 1,000 | 1,000 | - | 0% | 75 | - |
| | **52750** | EDITORIAL ADVIS COMMITTEE EXP | 300 | 300 | - | 0% | - | - |
| | **TOTAL DIRECT EXPENSES** | | **382,945** | **407,945** | **25,000** | **7%** | **358,713** | **214,226** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 199,151 | 206,179 | 7,028 | 4% | 197,992 | 101,776 |
| | **51299** | BENEFITS EXPENSE | 59,029 | 70,422 | 11,393 | 19% | 62,418 | 30,950 |
| | **51900** | OTHER INDIRECT EXPENSE | 73,346 | 68,772 | (4,574) | -6% | 50,200 | 32,173 |
| | **TOTAL INDIRECT EXPENSES:** | | **331,526** | **345,372** | **13,846** | **4%** | **310,610** | **164,899** |
| | **TOTAL ALL EXPENSES:** | | **714,471** | **753,317** | **38,846** | **5%** | **669,323** | **379,125** |
| | **NET INCOME (LOSS):** | | **(184,871)** | **(118,717)** | **66,154** | **-36%** | **(93,111)** | **(61,582)** |

## Washington State Bar Association
### Budget Comparison

## BOARD OF GOVERNORS

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **1.73** |
| **BOG** | **FY26 FTE** | **1.73** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | - | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50140** | SUPPLIES | 765 | 600 | (165) | -22% | 415 | 350 |
| | **52125** | LEADERSHIP TRAINING | 15,000 | 10,000 | (5,000) | -33% | 13,474 | - |
| | **52810** | BOG MEETINGS | 175,000 | 160,000 | (15,000) | -9% | 148,846 | 46,003 |
| | **52820** | BOG COMMITTEES' EXPENSES | 11,200 | 10,000 | (1,200) | -11% | 4,786 | 2,305 |
| | **52821** | BOG RETREAT | 40,000 | 40,000 | - | 0% | 43,964 | 31,539 |
| | **52822** | BOG CONFERENCE ATTENDANCE | 56,500 | 48,000 | (8,500) | -15% | 37,343 | 16,727 |
| | **52830** | BOG TRAVEL & OUTREACH | 70,000 | 52,000 | (18,000) | -26% | 41,245 | 42,518 |
| | **52880** | BOG ELECTIONS | 26,900 | 25,000 | (1,900) | -7% | 16,298 | - |
| | **52960** | PRESIDENT'S DINNER | 12,000 | 13,000 | 1,000 | 8% | 10,869 | - |
| | **52812** | NEW GOVERNOR ORIENTATION | 7,000 | 5,000 | (2,000) | -29% | 249 | - |
| | **52823** | PRESIDENTS PHOTO | 3,300 | 3,300 | - | 0% | 1,966 | - |
| | **TOTAL DIRECT EXPENSES** | | **417,665** | **366,900** | **(50,765)** | **-12%** | **319,455** | **139,442** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 135,043 | 140,784 | 5,740 | 4% | 131,344 | 69,091 |
| | **51299** | BENEFITS EXPENSE | 44,269 | 42,323 | (1,946) | -4% | 46,441 | 23,372 |
| | **51900** | OTHER INDIRECT EXPENSE | 59,572 | 55,857 | (3,715) | -6% | 40,803 | 25,997 |
| | **TOTAL INDIRECT EXPENSES:** | | **238,885** | **238,964** | **79** | **0%** | **218,588** | **118,460** |
| | **TOTAL ALL EXPENSES:** | | **656,550** | **605,864** | **(50,686)** | **-8%** | **538,044** | **257,901** |
| | **NET INCOME (LOSS):** | | **(656,550)** | **(605,864)** | **50,686** | **-8%** | **(538,044)** | **(257,901)** |

## Washington State Bar Association
### Budget Comparison

## CONFERENCE AND BROADCAST SERVICES

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **0.55** |
| **CBS** | **FY26 FTE** | **0.55** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **TOTAL DIRECT EXPENSES** | | - | - | - | | - | - |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 49,269 | 51,267 | 1,997 | 4% | - | 25,327 |
| | **51299** | BENEFITS EXPENSE | 14,930 | 16,251 | 1,321 | 9% | - | 7,893 |
| | **51900** | OTHER INDIRECT EXPENSE | 18,939 | 17,758 | (1,181) | -6% | - | 8,314 |
| | **TOTAL INDIRECT EXPENSES:** | | **83,138** | **85,276** | **2,138** | **3%** | **-** | **41,533** |
| | **TOTAL ALL EXPENSES:** | | **83,138** | **85,276** | **2,138** | **3%** | **-** | **41,533** |
| | **NET INCOME (LOSS):** | | **(83,138)** | **(85,276)** | **(2,138)** | **3%** | **-** | **(41,533)** |

## Washington State Bar Association
**Budget Comparison**

## CHARACTER & FITNESS BOARD

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **0.85** |
| **CFB** | **FY26 FTE** | **0.85** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **52235** | CHARACTER & FITNESS BOARD EXP | 12,000 | 15,000 | 3,000 | 25% | 11,065 | 5,139 |
| | **54310** | COURT REPORTERS | 11,050 | 12,000 | 950 | 9% | 8,826 | 5,943 |
| | **TOTAL DIRECT EXPENSES** | | **23,050** | **27,000** | **3,950** | **17%** | **19,891** | **11,082** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 103,891 | 108,084 | 4,193 | 4% | 95,640 | 53,242 |
| | **51299** | BENEFITS EXPENSE | 26,820 | 35,714 | 8,894 | 33% | 26,676 | 14,044 |
| | **51900** | OTHER INDIRECT EXPENSE | 29,270 | 27,444 | (1,825) | -6% | 17,779 | 12,775 |
| | **TOTAL INDIRECT EXPENSES:** | | **159,981** | **171,242** | **11,262** | **7%** | **140,095** | **80,060** |
| | **TOTAL ALL EXPENSES:** | | **183,031** | **198,242** | **15,212** | **8%** | **159,986** | **91,143** |
| | **NET INCOME (LOSS):** | | **(183,031)** | **(198,242)** | **(15,212)** | **8%** | **(159,986)** | **(91,143)** |

## Washington State Bar Association
### Budget Comparison

## COMMUNICATION STRATEGIES

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **5.39** |
| **COMM** | **FY26 FTE** | **5.39** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **42570** | 50 YEAR MEMBER TRIBUTE LUNCH | 1,000 | 1,000 | - | 0% | 1,231 | - |
| | **44100** | WSBA LOGO MERCHANDISE SALES | 2,000 | - | (2,000) | -100% | 2,039 | - |
| | **TOTAL REVENUE** | | **3,000** | **1,000** | **(2,000)** | **-67%** | **3,270** | **-** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 5,895 | 8,445 | 2,550 | 43% | 2,480 | 1,188 |
| | **50110** | STAFF CONFERENCE & TRAINING | 11,300 | 11,300 | - | 0% | 12,182 | 7,791 |
| | **50120** | STAFF MEMBERSHIP DUES | 1,800 | 1,800 | - | 0% | 987 | 537 |
| | **50130** | SUBSCRIPTIONS | 4,520 | 12,420 | 7,900 | 175% | 1,993 | 1,157 |
| | **50145** | SURVEYS | - | 20,000 | 20,000 | | - | - |
| | **50155** | DIGITAL/ONLINE DEVELOPMENT | - | 287 | 287 | | - | - |
| | **52511** | BAR LEADERS SUMMIT | 35,000 | 35,700 | 700 | 2% | 33,963 | - |
| | **52570** | APEX | 52,500 | 60,000 | 7,500 | 14% | 57,594 | 380 |
| | **52573** | 50 YEAR MEMBER TRIBUTE LUNCH | 38,000 | 44,913 | 6,913 | 18% | 29,644 | - |
| | **52878** | COMMUNICATIONS OUTREACH | 8,000 | 15,600 | 7,600 | 95% | 12,049 | 2,814 |
| | **54027** | BAR OUTREACH | 22,000 | 20,000 | (2,000) | -9% | 16,256 | 15,730 |
| | **54065** | AMBASSADOR TRAINING & TOWN HALLS | 10,000 | 10,000 | - | 0% | - | - |
| | **TOTAL DIRECT EXPENSES** | | **189,015** | **240,465** | **51,450** | **27%** | **167,148** | **29,597** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 417,995 | 415,931 | (2,064) | 0% | 387,587 | 206,485 |
| | **51299** | BENEFITS EXPENSE | 137,502 | 124,840 | (12,662) | -9% | 141,929 | 72,116 |
| | **51900** | OTHER INDIRECT EXPENSE | 185,603 | 174,028 | (11,576) | -6% | 127,339 | 81,186 |
| | **TOTAL INDIRECT EXPENSES:** | | **741,101** | **714,799** | **(26,302)** | **-4%** | **656,855** | **359,787** |
| | **TOTAL ALL EXPENSES:** | | **930,116** | **955,264** | **25,148** | **3%** | **824,003** | **389,384** |
| | **NET INCOME (LOSS):** | | **(927,116)** | **(954,264)** | **(27,148)** | **3%** | **(820,733)** | **(389,384)** |

## Washington State Bar Association
**Budget Comparison**

**COMMUNICATION STRATEGIES FTE**

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **1.00** |
| **COMM FTE** | **FY26 FTE** | **1.00** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **TOTAL DIRECT EXPENSES** | | - | - | - | | - | - |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 183,193 | 189,449 | 6,256 | 3% | 183,668 | 94,767 |
| | **51299** | BENEFITS EXPENSE | 39,830 | 47,473 | 7,643 | 19% | 45,043 | 20,681 |
| | **51900** | OTHER INDIRECT EXPENSE | 34,435 | 32,287 | (2,148) | -6% | 23,706 | 15,124 |
| | **TOTAL INDIRECT EXPENSES:** | | **257,458** | **269,210** | **11,752** | **5%** | **252,417** | **130,572** |
| | **NET INCOME (LOSS):** | | **(257,458)** | **(269,210)** | **(11,752)** | **5%** | **(252,417)** | **(130,572)** |

## Washington State Bar Association
### Budget Comparison

**DISCIPLINE**
**Cost Center** **FY27 FTE** **40.00**
**DISC** **FY26 FTE** **39.00**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **42450** | AUDIT REVENUE | 1,000 | 2,000 | 1,000 | 100% | 680 | 914 |
| | **44350** | RECOVERY OF DISCIPLINE COSTS | 65,000 | 60,000 | (5,000) | -8% | 49,963 | 35,441 |
| | **44450** | DISCIPLINE HISTORY SUMMARY | 19,000 | 21,000 | 2,000 | 11% | 21,317 | 11,940 |
| | **TOTAL REVENUE** | | **85,000** | **83,000** | **(2,000)** | **-2%** | **71,960** | **48,295** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50080** | PUBLICATIONS PRODUCTION | 350 | 350 | - | 0% | 122 | - |
| | **50100** | STAFF TRAVEL/PARKING | 15,000 | 17,500 | 2,500 | 17% | 10,929 | 9,548 |
| | **50110** | STAFF CONFERENCE & TRAINING | 37,800 | 49,000 | 11,200 | 30% | 29,817 | 23,220 |
| | **50120** | STAFF MEMBERSHIP DUES | 7,659 | 7,953 | 294 | 4% | 6,995 | 7,456 |
| | **50160** | TELEPHONE | 3,000 | 3,000 | - | 0% | 2,291 | 1,191 |
| | **54310** | COURT REPORTERS | 66,200 | 50,000 | (16,200) | -24% | 46,308 | 24,357 |
| | **54320** | OUTSIDE COUNSEL EXPENSES | 500 | 500 | - | 0% | - | - |
| | **54360** | LITIGATION EXPENSES | 30,000 | 25,000 | (5,000) | -17% | 12,431 | 7,710 |
| | **54370** | DISABILITY EXPENSES | 15,000 | 17,000 | 2,000 | 13% | 8,427 | 4,696 |
| | **54400** | TRANSLATION SERVICES | 10,000 | 23,000 | 13,000 | 130% | 4,376 | 8,190 |
| | **TOTAL DIRECT EXPENSES** | | **185,509** | **193,303** | **7,794** | **4%** | **121,696** | **86,369** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 4,131,360 | 4,396,833 | 265,472 | 6% | 3,946,975 | 2,017,777 |
| | **51299** | BENEFITS EXPENSE | 1,139,859 | 1,352,578 | 212,719 | 19% | 1,209,931 | 588,371 |
| | **51900** | OTHER INDIRECT EXPENSE | 1,342,955 | 1,291,486 | (51,469) | -4% | 920,518 | 587,275 |
| | **TOTAL INDIRECT EXPENSES:** | | **6,614,175** | **7,040,897** | **426,721** | **6%** | **6,077,424** | **3,193,423** |
| | **TOTAL ALL EXPENSES:** | | **6,799,684** | **7,234,200** | **434,515** | **6%** | **6,199,120** | **3,279,792** |
| | **NET INCOME (LOSS):** | | **(6,714,684)** | **(7,151,200)** | **(436,515)** | **7%** | **(6,127,161)** | **(3,231,497)** |

## Washington State Bar Association
**Budget Comparison**

**DIVERSITY**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **Cost Center** | **FY27 FTE** | **2.15** | | | | | | |
| **DIV** | **FY26 FTE** | **2.24** | | | | | | |
| **REVENUE:** | | | | | | | | |
| | **40300** | DONATIONS & GRANTS | 135,000 | 115,000 | (20,000) | -15% | 135,000 | 135,000 |
| | **TOTAL REVENUE** | | **135,000** | **115,000** | **(20,000)** | **-15%** | **135,000** | **135,000** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50033** | CONSULTING SERVICES | 3,000 | 3,000 | - | 0% | 45 | - |
| | **50100** | STAFF TRAVEL/PARKING | 3,700 | 3,700 | - | 0% | 2,771 | 394 |
| | **50110** | STAFF CONFERENCE & TRAINING | 4,400 | 6,300 | 1,900 | 43% | 2,662 | - |
| | **50120** | STAFF MEMBERSHIP DUES | 775 | 780 | 5 | 1% | 655 | 430 |
| | **52680** | DEI COUNCIL | 7,600 | 5,600 | (2,000) | -26% | 4,323 | 1,917 |
| | **52681** | DIVERSITY EVENTS & PROJECTS | 33,600 | 43,300 | 9,700 | 29% | 14,329 | 5,091 |
| | **52687** | STAFF EQUITY LEADERSHIP LAB | 6,000 | 7,500 | 1,500 | 25% | 2,039 | 2,949 |
| | **TOTAL DIRECT EXPENSES** | | **59,075** | **70,180** | **11,105** | **19%** | **26,824** | **10,781** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 198,124 | 195,896 | (2,228) | -1% | 199,629 | 88,344 |
| | **51299** | BENEFITS EXPENSE | 66,814 | 61,167 | (5,646) | -8% | 72,149 | 30,944 |
| | **51900** | OTHER INDIRECT EXPENSE | 77,134 | 69,417 | (7,716) | -10% | 63,447 | 36,410 |
| | **TOTAL INDIRECT EXPENSES:** | | **342,071** | **326,480** | **(15,591)** | **-5%** | **335,225** | **155,698** |
| | **TOTAL ALL EXPENSES:** | | **401,146** | **396,660** | **(4,486)** | **-1%** | **362,050** | **166,479** |
| | **NET INCOME (LOSS):** | | **(266,146)** | **(281,660)** | **(15,514)** | **6%** | **(227,050)** | **(31,479)** |

## Washington State Bar Association
### Budget Comparison

**ENTITY REGULATION**

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Cost Center** | **FY27 FTE** | **0.40** | **FY2026 Budget** | **FY2027 Budget** | **FY26 vs. FY27 Comparison** | **% Change** | **FY2025 Actuals YTD** | **FY2026 Actuals YTD** |
| **ER** | **FY26 FTE** | **0.55** | | | | | | |
| **REVENUE:** | | | | | | | | |
| | **42233** | APPLICATION FEES | 28,000 | 22,000 | (6,000) | -21% | - | 15,000 |
| | **42234** | ANNUAL FEES | 47,500 | 65,000 | 17,500 | 37% | - | - |
| | **TOTAL REVENUE** | | **75,500** | **87,000** | **11,500** | **15%** | **-** | **15,000** |
| | **50015** | DEPRECIATION | - | 5,863 | 5,863 | | - | - |
| | **50110** | STAFF CONFERENCE & TRAINING | 4,400 | 4,400 | - | 0% | - | 1,551 |
| | **52246** | INVESTIGATION | 9,600 | 7,680 | (1,920) | -20% | - | - |
| | **52692** | OUTREACH & COMMUNICATION | 10,000 | 10,000 | - | 0% | - | - |
| | **53282** | SOFTWARE HOSTING | 3,973 | 1,007 | (2,966) | -75% | - | 471 |
| | **TOTAL DIRECT EXPENSES** | | **27,973** | **28,949** | **977** | **3%** | **-** | **2,021** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 77,471 | 67,436 | (10,035) | -13% | - | 39,987 |
| | **51299** | BENEFITS EXPENSE | 18,673 | 17,417 | (1,256) | -7% | - | 9,787 |
| | **51900** | OTHER INDIRECT EXPENSE | 18,939 | 12,915 | (6,024) | -32% | - | 8,314 |
| | **TOTAL INDIRECT EXPENSES:** | | **115,083** | **97,768** | **(17,315)** | **-15%** | **-** | **58,088** |
| | **TOTAL ALL EXPENSES:** | | **143,055** | **126,717** | **(16,338)** | **-11%** | **-** | **60,109** |
| | **NET INCOME (LOSS):** | | **(67,555)** | **(39,717)** | **27,838** | **-41%** | **-** | **(45,109)** |

## Washington State Bar Association
**Budget Comparison**

## FACILITIES AND OPERATIONS

**Cost Center** **FY27 FTE** **5.97**
**FAC** **FY26 FTE** **5.78**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 2,376 | 2,376 | - | 0% | 2,299 | 1,188 |
| | **50110** | STAFF CONFERENCE & TRAINING | - | 2,500 | 2,500 | | 512 | - |
| | **50120** | STAFF MEMBERSHIP DUES | 189 | 195 | 6 | 3% | 200 | - |
| | **TOTAL DIRECT EXPENSES** | | **2,565** | **5,071** | **2,506** | **98%** | **3,011** | **1,188** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 406,195 | 461,839 | 55,644 | 14% | 418,565 | 218,375 |
| | **51299** | BENEFITS EXPENSE | 141,474 | 167,328 | 25,854 | 18% | 152,500 | 76,631 |
| | **51900** | OTHER INDIRECT EXPENSE | 199,033 | 192,754 | (6,279) | -3% | 136,831 | 86,965 |
| | **TOTAL INDIRECT EXPENSES:** | | **746,702** | **821,922** | **75,220** | **10%** | **707,896** | **381,971** |
| | **TOTAL ALL EXPENSES:** | | **749,267** | **826,993** | **77,726** | **10%** | **710,907** | **383,159** |
| | **NET INCOME (LOSS):** | | **(749,267)** | **(826,993)** | **(77,726)** | **10%** | **(710,907)** | **(383,159)** |

## Washington State Bar Association
### Budget Comparison

**FINANCE**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **Cost Center** | **FY27 FTE** | **6.92** | | | | | | |
| **FIN** | **FY26 FTE** | **6.92** | | | | | | |
| **REVENUE:** | | | | | | | | |
| | **40500** | INTEREST - INVESTMENTS | 600,000 | 450,000 | (150,000) | -25% | 746,108 | 320,276 |
| | **TOTAL REVENUE** | | **600,000** | **450,000** | **(150,000)** | **-25%** | **746,108** | **320,276** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 3,750 | 3,750 | - | 0% | 2,920 | 2,882 |
| | **50110** | STAFF CONFERENCE & TRAINING | 500 | 500 | - | 0% | 303 | - |
| | **50120** | STAFF MEMBERSHIP DUES | 670 | 705 | 35 | 5% | 350 | 230 |
| | **TOTAL DIRECT EXPENSES** | | **4,920** | **4,955** | **35** | **1%** | **3,574** | **3,112** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 777,786 | 805,328 | 27,542 | 4% | 763,774 | 398,571 |
| | **51299** | BENEFITS EXPENSE | 209,178 | 242,676 | 33,498 | 16% | 225,519 | 111,135 |
| | **51900** | OTHER INDIRECT EXPENSE | 238,288 | 223,427 | (14,861) | -6% | 163,500 | 104,200 |
| | **51936** | FACILITY RESERVE REBATE | - | - | | | 10,962 | - |
| | **TOTAL INDIRECT EXPENSES:** | | **1,225,253** | **1,271,431** | **46,178** | **4%** | **1,163,755** | **613,906** |
| | **TOTAL ALL EXPENSES:** | | **1,230,173** | **1,276,386** | **46,213** | **4%** | **1,167,328** | **617,018** |
| | **NET INCOME (LOSS):** | | **(630,173)** | **(826,386)** | **(196,213)** | **31%** | **(421,220)** | **(296,742)** |

## Washington State Bar Association
### Budget Comparison

**FOUNDATION**

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **1.05** |
| **FOUND** | **FY26 FTE** | **1.05** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50033** | CONSULTING SERVICES | 3,350 | 3,500 | 150 | 4% | 3,200 | 3,350 |
| | **50050** | EQUIPMENT, HARDWARE & SOFTWARE | 2,635 | 3,317 | 682 | 26% | 2,635 | 1,318 |
| | **50060** | POSTAGE | 400 | 400 | - | 0% | - | - |
| | **50070** | PRINTING & COPYING | 1,000 | 1,000 | - | 0% | 362 | - |
| | **50100** | STAFF TRAVEL/PARKING | 4,000 | 2,500 | (1,500) | -38% | 685 | 21 |
| | **50110** | STAFF CONFERENCE & TRAINING | 2,200 | 2,200 | - | 0% | 1,687 | 69 |
| | **50140** | SUPPLIES | 2,000 | 2,000 | - | 0% | 1,775 | 11 |
| | **52940** | BOARD OF TRUSTEES | 3,600 | 7,000 | 3,400 | 94% | 3,593 | 100 |
| | **TOTAL DIRECT EXPENSES** | | **19,185** | **21,917** | **2,732** | **14%** | **13,937** | **4,869** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 108,755 | 112,614 | 3,859 | 4% | 106,658 | 56,719 |
| | **51299** | BENEFITS EXPENSE | 30,528 | 40,937 | 10,409 | 34% | 32,740 | 15,890 |
| | **51900** | OTHER INDIRECT EXPENSE | 36,156 | 33,902 | (2,255) | -6% | 24,752 | 15,782 |
| | **TOTAL INDIRECT EXPENSES:** | | **175,440** | **187,453** | **12,013** | **7%** | **164,150** | **88,391** |
| | **TOTAL ALL EXPENSES:** | | **194,625** | **209,370** | **14,745** | **8%** | **178,087** | **93,261** |
| | **NET INCOME (LOSS):** | | **(194,625)** | **(209,370)** | **(14,745)** | **8%** | **(178,087)** | **(93,261)** |

## Washington State Bar Association
**Budget Comparison**

## HUMAN RESOURCES

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **4.00** |
| **HR** | **FY26 FTE** | **4.00** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50033** | CONSULTING SERVICES | 1,000 | 1,000 | - | 0% | - | - |
| | **50100** | STAFF TRAVEL/PARKING | 300 | 300 | - | 0% | 121 | 96 |
| | **50110** | STAFF CONFERENCE & TRAINING | 4,200 | 4,000 | (200) | -5% | 1,147 | 2,577 |
| | **50120** | STAFF MEMBERSHIP DUES | 1,200 | 1,200 | - | 0% | 752 | 852 |
| | **50130** | SUBSCRIPTIONS | 2,000 | 1,300 | (700) | -35% | 993 | 1,192 |
| | **54512** | STAFF TRAINING- GENERAL | 29,300 | 18,000 | (11,300) | -39% | 4,971 | 3,764 |
| | **54520** | RECRUITING AND ADVERTISING | 8,750 | 8,750 | - | 0% | 5,013 | 1,778 |
| | **54530** | HR INFORMATION SYSTEM | 65,950 | 60,000 | (5,950) | -9% | 50,000 | 34,975 |
| | **54540** | SALARY SURVEYS | 3,000 | 1,000 | (2,000) | -67% | - | 934 |
| | **54590** | TRANSFER TO INDIRECT EXPENSE | (115,700) | (95,550) | 20,150 | -17% | (62,998) | (46,168) |
| | **TOTAL DIRECT EXPENSES** | | - | - | - | | - | - |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 504,229 | 519,623 | 15,394 | 3% | 515,618 | 220,428 |
| | **51299** | BENEFITS EXPENSE | 98,098 | 125,969 | 27,870 | 28% | 135,556 | 62,305 |
| | **51925** | ALLOWANCE FOR OPEN POSITIONS | (200,000) | (200,000) | - | 0% | - | - |
| | **51900** | OTHER INDIRECT EXPENSE | 137,739 | 129,149 | (8,590) | -6% | 94,474 | 60,283 |
| | **TOTAL INDIRECT EXPENSES:** | | **540,066** | **574,740** | **34,674** | **6%** | **745,647** | **343,016** |
| | **TOTAL ALL EXPENSES:** | | **540,066** | **574,740** | **34,674** | **6%** | **745,647** | **343,016** |
| | **NET INCOME (LOSS):** | | **(540,066)** | **(574,740)** | **(34,674)** | **6%** | **(745,647)** | **(343,016)** |

## Washington State Bar Association
**Budget Comparison**

## LAW CLERK PROGRAM

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **Cost Center** | **FY27 FTE** | **1.18** | | | | | | |
| **CLERK** | **FY26 FTE** | **1.18** | | | | | | |
| **REVENUE:** | | | | | | | | |
| | **42275** | LAW CLERK FEES | 220,000 | 308,000 | 88,000 | 40% | 251,493 | 251,667 |
| | **42286** | LAW CLERK APPLICATION FEES | 4,000 | 5,000 | 1,000 | 25% | 5,100 | 3,300 |
| | **TOTAL REVENUE** | | **224,000** | **313,000** | **89,000** | **40%** | **256,593** | **254,967** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50015** | DEPRECIATION | 37,278 | 34,417 | (2,861) | -8% | 10,792 | 17,448 |
| | **50130** | SUBSCRIPTIONS | 331 | 350 | 19 | 6% | 300 | - |
| | **52245** | CHARACTER & FITNESS INVESTI | 100 | 100 | - | 0% | - | - |
| | **53282** | SOFTWARE HOSTING | 700 | 993 | 293 | 42% | 694 | 513 |
| | **52255** | LAW CLERK BOARD | 9,000 | 6,000 | (3,000) | -33% | 5,950 | 5,122 |
| | **52258** | LAW CLERK OUTREACH | 20,000 | 15,000 | (5,000) | -25% | 11,025 | 13,705 |
| | **TOTAL DIRECT EXPENSES** | | **67,409** | **56,860** | **(10,549)** | **-16%** | **28,761** | **36,789** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 104,845 | 111,084 | 6,240 | 6% | 116,579 | 50,553 |
| | **51299** | BENEFITS EXPENSE | 31,938 | 32,700 | 762 | 2% | 36,511 | 16,612 |
| | **51900** | OTHER INDIRECT EXPENSE | 40,633 | 38,099 | (2,534) | -6% | 28,935 | 17,709 |
| | **TOTAL INDIRECT EXPENSES:** | | **177,416** | **181,883** | **4,467** | **3%** | **182,024** | **84,874** |
| | **TOTAL ALL EXPENSES:** | | **244,825** | **238,744** | **(6,081)** | **-2%** | **210,785** | **121,663** |
| | **NET INCOME (LOSS):** | | **(20,825)** | **74,256** | **95,081** | **-457%** | **45,807** | **133,304** |

## Washington State Bar Association
**Budget Comparison**

## LEGISLATIVE

**Cost Center** **FY27 FTE** **1.70**
**LEG** **FY26 FTE** **1.70**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | **-** | **-** | **-** | | **-** | **-** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 2,500 | 2,500 | - | 0% | 565 | 157 |
| | **50110** | STAFF CONFERENCE & TRAINING | 2,200 | 2,200 | - | 0% | 2,101 | 248 |
| | **50120** | STAFF MEMBERSHIP DUES | 215 | 215 | - | 0% | 215 | - |
| | **50130** | SUBSCRIPTIONS | 2,000 | 2,000 | - | 0% | 1,986 | 1,990 |
| | **50160** | TELEPHONE | 575 | 575 | - | 0% | 577 | 298 |
| | **52660** | JUD RECOMMEND COMMITTEE | 3,250 | 3,250 | - | 0% | 1,675 | 1,096 |
| | **54920** | CONTRACT LOBBYIST | 12,500 | 15,000 | 2,500 | 20% | 15,000 | 9,375 |
| | **54940** | LEGISLATIVE COMMITTEE | 1,250 | 1,250 | - | 0% | 130 | - |
| | **54970** | BOG LEGISLATIVE COMMITTEE | 300 | 300 | - | 0% | - | - |
| | **TOTAL DIRECT EXPENSES** | | **24,790** | **27,290** | **2,500** | **10%** | **22,248** | **13,163** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 164,492 | 171,002 | 6,511 | 4% | 163,053 | 81,273 |
| | **51299** | BENEFITS EXPENSE | 47,770 | 54,877 | 7,107 | 15% | 51,318 | 24,951 |
| | **51900** | OTHER INDIRECT EXPENSE | 58,539 | 54,888 | (3,651) | -6% | 40,091 | 25,575 |
| | **TOTAL INDIRECT EXPENSES:** | | **270,801** | **280,767** | **9,966** | **4%** | **254,461** | **131,798** |
| | **TOTAL ALL EXPENSES:** | | **295,591** | **308,057** | **12,466** | **4%** | **276,709** | **144,962** |
| | **NET INCOME (LOSS):** | | **(295,591)** | **(308,057)** | **(12,466)** | **4%** | **(276,709)** | **(144,962)** |

## Washington State Bar Association
### Budget Comparison

**LEGAL LUNCHBOX**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **Cost Center** | **FY27 FTE** | **0.45** | | | | | | |
| **LLB** | **FY26 FTE** | **0.45** | | | | | | |
| **REVENUE:** | | | | | | | | |
| | **41450** | SPONSORSHIPS | 9,000 | 9,000 | - | 0% | 9,000 | 9,000 |
| | **43400** | DIGITAL VIDEO SALES | 25,000 | 25,000 | - | 0% | 26,705 | 21,266 |
| | **TOTAL REVENUE** | | **34,000** | **34,000** | **-** | **0%** | **35,705** | **30,266** |
| **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% | 4,414 | 4,422 |
| | **53731** | INSURANCE REBATE | - | - | - | | (980) | - |
| | **TOTAL DIRECT EXPENSES** | | **8,100** | **8,100** | **-** | **0%** | **3,434** | **4,422** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 33,193 | 34,909 | 1,717 | 5% | 31,125 | 16,892 |
| | **51299** | BENEFITS EXPENSE | 11,236 | 11,204 | (32) | 0% | 11,320 | 5,972 |
| | **51900** | OTHER INDIRECT EXPENSE | 15,496 | 14,529 | (966) | -6% | 10,110 | 6,810 |
| | **51935** | INSURANCE REBATE | - | - | - | | (11,679) | - |
| | **TOTAL INDIRECT EXPENSES:** | | **59,925** | **60,643** | **718** | **1%** | **40,876** | **29,673** |
| | **TOTAL ALL EXPENSES:** | | **68,025** | **68,743** | **718** | **1%** | **44,310** | **34,095** |
| | **NET INCOME (LOSS):** | | **(34,025)** | **(34,743)** | **(718)** | **2%** | **(8,605)** | **(3,829)** |

## Washington State Bar Association
### Budget Comparison

## LICENSING & MEMBERSHIP RECORDS

**Cost Center** **FY27 FTE** **4.78**
**LICMR** **FY26 FTE** **4.78**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **41100** | STATUS CERTIFICATE FEES | 29,000 | 29,000 | - | 0% | 30,900 | 17,174 |
| | **42288** | INVESTIGATION FEES | 25,000 | 25,000 | - | 0% | 26,100 | 10,580 |
| | **42290** | PRO HAC VICE | 435,000 | 450,000 | 15,000 | 3% | 478,994 | 281,982 |
| | **45040** | MEMBER CONTACT INFORMATION | 5,000 | 5,000 | - | 0% | 4,773 | 4,055 |
| | **45060** | PHOTO BAR CARD SALES | 260 | 300 | 40 | 15% | 648 | 324 |
| | **TOTAL REVENUE** | | **494,260** | **509,300** | **15,040** | **3%** | **541,415** | **314,115** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50033** | CONSULTING SERVICES | - | - | - | | 6,000 | - |
| | **50060** | POSTAGE | 4,000 | 4,000 | - | 0% | 3,725 | 2,144 |
| | **50110** | STAFF CONFERENCE & TRAINING | - | 4,400 | 4,400 | | - | - |
| | **52246** | INVESTIGATION | 300 | 300 | - | 0% | - | - |
| | **54360** | LITIGATION EXPENSES | - | - | - | | 29 | - |
| | **53282** | SOFTWARE HOSTING | 18,380 | 28,367 | 9,987 | 54% | 18,682 | 13,265 |
| | **TOTAL DIRECT EXPENSES** | | **22,680** | **37,067** | **14,387** | **63%** | **28,437** | **15,409** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 503,843 | 518,856 | 15,013 | 3% | 505,732 | 256,713 |
| | **51299** | BENEFITS EXPENSE | 139,284 | 176,890 | 37,606 | 27% | 151,518 | 72,859 |
| | **51900** | OTHER INDIRECT EXPENSE | 164,598 | 154,333 | (10,266) | -6% | 113,996 | 72,027 |
| | **TOTAL INDIRECT EXPENSES:** | | **807,725** | **850,078** | **42,353** | **5%** | **771,246** | **401,600** |
| | **TOTAL ALL EXPENSES:** | | **830,405** | **887,146** | **56,741** | **7%** | **799,683** | **417,009** |
| | **NET INCOME (LOSS):** | | **(336,145)** | **(377,846)** | **(41,701)** | **12%** | **(258,268)** | **(102,894)** |

## Washington State Bar Association
**Budget Comparison**

**LICENSE FEES**
**Cost Center**
**LIC**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **40600** | LICENSE FEES | 16,922,074 | 17,279,644 | 357,570 | 2% | 16,399,640 | 8,185,024 |
| | **40625** | LICENSE FEES - NEW ADMITTEES | 465,192 | 451,887 | (13,305) | -3% | 457,728 | 288,154 |
| | **40650** | LICENSE FEES - LATE FEES | 250,000 | 300,000 | 50,000 | 20% | 455,102 | 477,437 |
| | **40675** | LICENSE FEES - REINSTATEMENTS | 15,000 | 15,000 | - | 0% | 18,950 | 7,288 |
| | **TOTAL REVENUE** | | **17,652,266** | **18,046,531** | **394,265** | **2%** | **17,331,420** | **8,957,902** |
| | **NET INCOME (LOSS):** | | **17,652,266** | **18,046,531** | **394,265** | **2%** | **17,331,420** | **8,957,902** |

## Washington State Bar Association
### Budget Comparison

## LIMITED LICENSE LEGAL TECHNICIAN PROGRAM

**Cost Center** **FY27 FTE** **0.43**
**LLLT** **FY26 FTE** **0.43**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **41800** | SEMINAR REGISTRATIONS | - | - | - | | 6,240 | - |
| | **42281** | LLLT LICENSE FEES | 17,000 | 15,000 | (2,000) | -12% | 16,235 | 8,012 |
| | **42291** | LLLT LATE LICENSE FEES | 137 | 300 | 163 | 119% | 365 | 541 |
| | **45220** | MCLE LATE FEES | 150 | 150 | - | 0% | - | 450 |
| | **TOTAL REVENUE** | | **17,287** | **15,450** | **(1,837)** | **-11%** | **22,840** | **9,003** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **52683** | LLLT BOARD | 9,000 | 9,000 | - | 0% | 2,702 | 1,304 |
| | **52689** | LLLT EDUCATION | 1,000 | 500 | (500) | -50% | 35 | - |
| | **TOTAL DIRECT EXPENSES** | | **10,000** | **9,500** | **(500)** | **-5%** | **2,737** | **1,304** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 41,479 | 43,806 | 2,327 | 6% | 54,809 | 20,884 |
| | **51299** | BENEFITS EXPENSE | 12,046 | 12,578 | 532 | 4% | 16,975 | 6,229 |
| | **51900** | OTHER INDIRECT EXPENSE | 14,807 | 13,883 | (923) | -6% | 13,606 | 6,413 |
| | **TOTAL INDIRECT EXPENSES:** | | **68,332** | **70,268** | **1,936** | **3%** | **85,389** | **33,525** |
| | **TOTAL ALL EXPENSES:** | | **78,332** | **79,768** | **1,436** | **2%** | **88,126** | **34,829** |
| | **NET INCOME (LOSS):** | | **(61,045)** | **(64,318)** | **(3,273)** | **5%** | **(65,286)** | **(25,826)** |

## Washington State Bar Association
### Budget Comparison

## LIMITED PRACTICE OFFICERS

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **0.58** |
| **LPO** | **FY26 FTE** | **0.58** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **42288** | INVESTIGATION FEES | 1,000 | 600 | (400) | -40% | 800 | 500 |
| | **45110** | LPO EXAMINATION FEES | 16,000 | 18,000 | 2,000 | 13% | 13,100 | 10,700 |
| | **45115** | LPO EXAM LATE FEES | 2,000 | 2,000 | - | 0% | 1,600 | 1,400 |
| | **45120** | LPO LICENSE FEES | 158,000 | 154,000 | (4,000) | -3% | 155,249 | 74,080 |
| | **45125** | LPO LATE LICENSE FEES | 2,000 | 3,000 | 1,000 | 50% | 3,750 | 3,450 |
| | **45220** | MCLE LATE FEES | 3,000 | 3,000 | - | 0% | 1,800 | 5,400 |
| | **TOTAL REVENUE** | | **182,000** | **180,600** | **(1,400)** | **-1%** | **176,299** | **95,530** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50070** | PRINTING & COPYING | 200 | 200 | - | 0% | 83 | 65 |
| | **50140** | SUPPLIES | 100 | 100 | - | 0% | - | - |
| | **52210** | FACILITY, PARKING, FOOD | 9,500 | 200 | (9,300) | -98% | 6,997 | 2,696 |
| | **52215** | EXAM GRADING | - | 5,400 | 5,400 | | - | - |
| | **52688** | EXAM WRITING | 15,000 | 15,000 | - | 0% | 8,400 | 4,200 |
| | **55130** | LPO BOARD EXPENSES | 4,000 | 4,000 | - | 0% | 1,277 | 267 |
| | **55165** | LPO OUTREACH | 500 | 500 | - | 0% | - | - |
| | **53282** | SOFTWARE HOSTING | 3,404 | 4,392 | 988 | 29% | 3,460 | 2,054 |
| | **TOTAL DIRECT EXPENSES** | | **32,704** | **29,792** | **(2,912)** | **-9%** | **20,217** | **9,282** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 56,369 | 59,871 | 3,502 | 6% | 66,267 | 28,318 |
| | **51299** | BENEFITS EXPENSE | 16,315 | 17,647 | 1,332 | 8% | 20,282 | 8,490 |
| | **51900** | OTHER INDIRECT EXPENSE | 19,972 | 18,727 | (1,246) | -6% | 16,211 | 8,736 |
| | **TOTAL INDIRECT EXPENSES:** | | **92,656** | **96,244** | **3,588** | **4%** | **102,760** | **45,544** |
| | **TOTAL ALL EXPENSES:** | | **125,360** | **126,037** | **676** | **1%** | **122,977** | **54,826** |
| | **NET INCOME (LOSS):** | | **56,640** | **54,563** | **(2,076)** | **-4%** | **53,322** | **40,704** |

## Washington State Bar Association
### Budget Comparison

## MANDATORY CONTINUING LEGAL EDUCATION

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **4.73** |
| **MCLE** | **FY26 FTE** | **4.73** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **45210** | ACTIVITY APPLICATION FEE | 670,000 | 700,000 | 30,000 | 4% | 708,300 | 344,400 |
| | **45215** | ACTIVITY APPLICATION LATE FEE | 250,000 | 260,000 | 10,000 | 4% | 268,800 | 129,500 |
| | **45220** | MCLE LATE FEES | 232,000 | 250,000 | 18,000 | 8% | 256,250 | 238,975 |
| | **45230** | ANNUAL ACCREDITED SPONSOR FEES | 36,250 | 36,750 | 500 | 1% | 40,000 | 36,250 |
| | **45250** | ATTENDANCE LATE FEES | 120,000 | 116,000 | (4,000) | -3% | 104,200 | 55,500 |
| | **45255** | COMITY CERTIFICATES - REQUEST | 13,000 | 13,000 | - | 0% | 14,175 | 9,825 |
| | **45260** | COMITY CERTIFICATES - SUBMIT | 17,000 | 17,000 | - | 0% | 19,700 | 16,450 |
| | **TOTAL REVENUE** | | **1,338,250** | **1,392,750** | **54,500** | **4%** | **1,411,425** | **830,900** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 50 | 50 | - | 0% | - | - |
| | **50110** | STAFF CONFERENCE & TRAINING | 4,400 | 4,400 | - | 0% | 5,045 | - |
| | **50120** | STAFF MEMBERSHIP DUES | 525 | 525 | - | 0% | 500 | 525 |
| | **55210** | MCLE BOARD EXPENSES | 6,000 | 3,000 | (3,000) | -50% | 1,806 | 531 |
| | **55220** | DEPRECIATION-SOFTWARE | 142,057 | 142,057 | 0 | 0% | 144,144 | 72,072 |
| | **TOTAL DIRECT EXPENSES** | | **153,032** | **150,032** | **(3,000)** | **-2%** | **151,496** | **73,128** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 407,360 | 427,261 | 19,901 | 5% | 396,116 | 224,665 |
| | **51299** | BENEFITS EXPENSE | 124,032 | 120,513 | (3,519) | -3% | 130,729 | 66,374 |
| | **51900** | OTHER INDIRECT EXPENSE | 162,876 | 152,718 | (10,158) | -6% | 112,777 | 71,182 |
| | **TOTAL INDIRECT EXPENSES:** | | **694,269** | **700,492** | **6,223** | **1%** | **639,622** | **362,221** |
| | **TOTAL ALL EXPENSES:** | | **847,301** | **850,525** | **3,224** | **0%** | **791,118** | **435,349** |
| | **NET INCOME (LOSS):** | | **490,949** | **542,225** | **51,276** | **10%** | **620,307** | **395,551** |

## Washington State Bar Association
### Budget Comparison

## MEMBER WELLNESS PROGRAM

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **1.81** |
| **MWP** | **FY26 FTE** | **1.48** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **40205** | DIVERSION | 9,000 | 6,000 | (3,000) | -33% | 2,500 | 2,000 |
| | **TOTAL REVENUE** | | **9,000** | **6,000** | **(3,000)** | **-33%** | **2,500** | **2,000** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 1,200 | 1,200 | - | 0% | 125 | 52 |
| | **50110** | STAFF CONFERENCE & TRAINING | 5,500 | 2,200 | (3,300) | -60% | 2,654 | 580 |
| | **50120** | STAFF MEMBERSHIP DUES | 500 | 875 | 375 | 75% | 689 | 300 |
| | **50130** | SUBSCRIPTIONS | 1,400 | 1,400 | - | 0% | 1,324 | 663 |
| | **54715** | MEMBER WELL-BEING TASK FORCE | 4,500 | - | (4,500) | -100% | 2,542 | 39 |
| | **TOTAL DIRECT EXPENSES** | | **13,100** | **5,675** | **(7,425)** | **-57%** | **7,335** | **1,633** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 149,311 | 172,241 | 22,931 | 15% | 145,333 | 77,451 |
| | **51299** | BENEFITS EXPENSE | 42,656 | 72,380 | 29,724 | 70% | 45,285 | 22,520 |
| | **51900** | OTHER INDIRECT EXPENSE | 50,963 | 58,440 | 7,476 | 15% | 34,861 | 22,356 |
| | **TOTAL INDIRECT EXPENSES:** | | **242,930** | **303,061** | **60,131** | **25%** | **225,480** | **122,327** |
| | **TOTAL ALL EXPENSES:** | | **256,030** | **308,736** | **52,706** | **21%** | **232,815** | **123,960** |
| | **NET INCOME (LOSS):** | | **(247,030)** | **(302,736)** | **(55,706)** | **23%** | **(230,315)** | **(121,960)** |

## Washington State Bar Association
### Budget Comparison

## MEMBER SERVICES & ENGAGEMENT

**Cost Center** **FY27 FTE** **2.45**
**MSE** **FY26 FTE** **2.45**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **40900** | ROYALTIES | 10,800 | 14,400 | 3,600 | 33% | 15,600 | 6,000 |
| | **41450** | SPONSORSHIPS | 2,500 | - | (2,500) | -100% | 2,600 | - |
| | **41800** | SEMINAR REGISTRATIONS | 2,000 | - | (2,000) | -100% | 1,080 | - |
| | **TOTAL REVENUE** | | **15,300** | **14,400** | **(900)** | **-6%** | **19,280** | **6,000** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50070** | PRINTING & COPYING | 1,600 | 1,600 | - | 0% | 1,442 | 1,502 |
| | **50085** | NEW MEMBER LIAISON SECTION PROGRAM | 1,300 | 1,300 | - | 0% | 585 | 565 |
| | **50095** | CLE COMPS | - | - | - | | 390 | - |
| | **50100** | STAFF TRAVEL/PARKING | 3,500 | 5,000 | 1,500 | 43% | 3,158 | 48 |
| | **50110** | STAFF CONFERENCE & TRAINING | 2,700 | 2,700 | - | 0% | 1,850 | (25) |
| | **50120** | STAFF MEMBERSHIP DUES | 1,020 | 1,020 | - | 0% | 390 | - |
| | **50130** | SUBSCRIPTIONS | 400 | 1,200 | 800 | 200% | 350 | - |
| | **54391** | LAW LIBRARY DESKBOOK ACCESS | 10,000 | - | (10,000) | -100% | 9,311 | - |
| | **54610** | LIBRARY MATERIALS/RESOURCES | 4,000 | 4,000 | - | 0% | 1,532 | 292 |
| | **55266** | NEW MEMBER OUTREACH EVENTS | 5,000 | 18,500 | 13,500 | 270% | 4,807 | 938 |
| | **55270** | WASHINGTON NEW MEMBERS COMMITTEE | 15,000 | 30,500 | 15,500 | 103% | 5,587 | 8,581 |
| | **55970** | MEMBER ENGAGEMENT COUNCIL | 500 | 500 | - | 0% | - | - |
| | **55981** | SMALL TOWN AND RURAL COUNCIL OUTREACH AND ACTIVITIES | 70,000 | 55,000 | (15,000) | -21% | 61,910 | 3,000 |
| | **55980** | SMALL TOWN AND RURAL COUNCIL | 7,500 | 7,500 | - | 0% | 1,586 | - |
| | **57460** | LAW SCHOOL OUTREACH | 500 | 500 | - | 0% | - | 66 |
| | **58175** | AWARDS | 1,000 | 1,000 | - | 0% | - | 72 |
| | **58450** | RECEPTION/FORUM EXPENSE | 1,000 | 1,000 | - | 0% | 200 | 17 |
| | **58525** | SCHOLARSHIPS/DONATIONS/GRANT | - | 4,000 | 4,000 | | - | - |
| | **TOTAL DIRECT EXPENSES** | | **125,020** | **135,320** | **10,300** | **8%** | **93,098** | **15,056** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 165,619 | 176,148 | 10,529 | 6% | 152,229 | 88,204 |
| | **51299** | BENEFITS EXPENSE | 59,059 | 77,984 | 18,925 | 32% | 60,478 | 31,248 |
| | **51900** | OTHER INDIRECT EXPENSE | 84,365 | 79,104 | (5,262) | -6% | 57,870 | 36,871 |
| | **TOTAL INDIRECT EXPENSES:** | | **309,043** | **333,236** | **24,192** | **8%** | **270,577** | **156,323** |
| | **TOTAL ALL EXPENSES:** | | **434,063** | **468,556** | **34,492** | **8%** | **363,674** | **171,380** |
| | **NET INCOME (LOSS):** | | **(418,763)** | **(454,156)** | **(35,392)** | **8%** | **(344,394)** | **(165,380)** |

## Washington State Bar Association
### Budget Comparison

**MINI CLE**

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **0.96** |
| **MINI** | **FY26 FTE** | **0.96** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **TOTAL DIRECT EXPENSES** | | - | - | - | | - | - |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 76,520 | 80,222 | 3,702 | 5% | 72,060 | 38,762 |
| | **51299** | BENEFITS EXPENSE | 24,764 | 24,365 | (399) | -2% | 25,111 | 13,091 |
| | **51900** | OTHER INDIRECT EXPENSE | 33,057 | 30,996 | (2,062) | -6% | 21,614 | 14,490 |
| | **TOTAL INDIRECT EXPENSES:** | | **134,341** | **135,582** | **1,241** | **1%** | **118,786** | **66,343** |
| | **NET INCOME (LOSS):** | | **(134,341)** | **(135,582)** | **(1,241)** | **1%** | **(118,786)** | **(66,343)** |

## Washington State Bar Association
### Budget Comparison

## NEW MEMBER EDUCATION

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Cost Center** | **FY27 FTE** | **0.87** | **FY2026 Budget** | **FY2027 Budget** | **FY26 vs. FY27 Comparison** | **% Change** | **FY2025 Actuals YTD** | **FY2026 Actuals YTD** |
| **NME** | **FY26 FTE** | **0.87** | | | | | | |
| **REVENUE:** | | | | | | | | |
| | **40300** | DONATIONS & GRANTS | - | - | - | | 15 | - |
| | **40950** | NME PRODUCT SALES | 120,000 | 100,000 | (20,000) | -17% | 139,406 | 90,654 |
| | **41800** | SEMINAR REGISTRATIONS | 10,000 | 7,000 | (3,000) | -30% | 19,458 | 7,593 |
| | **47100** | TRIAL ADVOCACY PROGRAM | 12,000 | 13,000 | 1,000 | 8% | 13,369 | (149) |
| | **TOTAL REVENUE** | | **142,000** | **120,000** | **(22,000)** | **-15%** | **172,247** | **98,098** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **55265** | SPEAKERS & PROGRAM DEVELOPMENT | 500 | 500 | - | 0% | 106 | - |
| | **57320** | TRIAL ADVOCACY EXPENSES | 3,200 | 3,500 | 300 | 9% | 2,432 | - |
| | **TOTAL DIRECT EXPENSES** | | **3,700** | **4,000** | **300** | **8%** | **2,538** | **-** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 66,306 | 69,455 | 3,149 | 5% | 63,527 | 33,992 |
| | **51299** | BENEFITS EXPENSE | 22,014 | 22,719 | 705 | 3% | 22,597 | 11,643 |
| | **51900** | OTHER INDIRECT EXPENSE | 29,958 | 28,090 | (1,868) | -6% | 19,871 | 13,011 |
| | **TOTAL INDIRECT EXPENSES:** | | **118,278** | **120,264** | **1,986** | **2%** | **105,995** | **58,646** |
| | **TOTAL ALL EXPENSES:** | | **121,978** | **124,264** | **2,286** | **2%** | **108,533** | **58,646** |
| | **NET INCOME (LOSS):** | | **20,022** | **(4,264)** | **(24,286)** | **-121%** | **63,714** | **39,452** |

## Washington State Bar Association
### Budget Comparison

## OFFICE OF GENERAL COUNSEL

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Cost Center** | **FY27 FTE** | **6.46** | **FY2026 Budget** | **FY2027 Budget** | **FY26 vs. FY27 Comparison** | **% Change** | **FY2025 Actuals YTD** | **FY2026 Actuals YTD** |
| **OGC** | **FY26 FTE** | **6.12** | | | | | | |
| **REVENUE:** | | | | | | | | |
| | **40210** | RECORDS REQUEST FEES | - | - | - | | 270 | - |
| | **44350** | RECOVERY OF DISCIPLINE COSTS | - | - | - | | - | 1,000 |
| | **TOTAL REVENUE** | | **-** | **-** | **-** | | **270** | **1,000** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 3,500 | 8,000 | 4,500 | 129% | 3,799 | 1,614 |
| | **50110** | STAFF CONFERENCE & TRAINING | 10,250 | 8,050 | (2,200) | -21% | 363 | 2,812 |
| | **50120** | STAFF MEMBERSHIP DUES | 2,500 | 2,500 | - | 0% | 1,625 | 2,004 |
| | **50140** | SUPPLIES | - | 150 | 150 | | 104 | - |
| | **52240** | DISABILITY ACCOMMODATIONS | 2,500 | 2,500 | - | 0% | 1,161 | 58 |
| | **54310** | COURT REPORTERS | - | - | - | | (179) | - |
| | **54360** | LITIGATION EXPENSES | 1,000 | 500 | (500) | -50% | 287 | - |
| | **55419** | COURT RULES COMMITTEE | 1,000 | 1,000 | - | 0% | - | - |
| | **55615** | WILLS | 1,000 | 1,000 | - | 0% | - | - |
| | **55620** | CUSTODIANSHIP | 5,000 | 2,500 | (2,500) | -50% | 201 | 301 |
| | **TOTAL DIRECT EXPENSES** | | **26,750** | **26,200** | **(550)** | **-2%** | **7,362** | **6,789** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 718,300 | 772,271 | 53,972 | 8% | 678,051 | 343,003 |
| | **51299** | BENEFITS EXPENSE | 187,732 | 195,391 | 7,659 | 4% | 201,611 | 95,734 |
| | **51900** | OTHER INDIRECT EXPENSE | 210,741 | 208,656 | (2,085) | -1% | 146,386 | 92,245 |
| | **TOTAL INDIRECT EXPENSES:** | | **1,116,772** | **1,176,318** | **59,546** | **5%** | **1,026,048** | **530,982** |
| | **TOTAL ALL EXPENSES:** | | **1,143,522** | **1,202,518** | **58,996** | **5%** | **1,033,410** | **537,771** |
| | **NET INCOME (LOSS):** | | **(1,143,522)** | **(1,202,518)** | **(58,996)** | **5%** | **(1,033,140)** | **(536,771)** |

## Washington State Bar Association
### Budget Comparison

## OFFICE OF THE EXECUTIVE DIRECTOR

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **4.18** |
| **OED** | **FY26 FTE** | **4.23** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 2,000 | 2,400 | 400 | 20% | 2,299 | 1,188 |
| | **50110** | STAFF CONFERENCE & TRAINING | 13,300 | 13,300 | - | 0% | 14,556 | 5,500 |
| | **50120** | STAFF MEMBERSHIP DUES | 1,335 | 1,225 | (110) | -8% | 1,120 | 945 |
| | **52125** | LEADERSHIP TRAINING | 20,000 | 15,000 | (5,000) | -25% | 11,951 | - |
| | **52585** | WASHINGTON LEADERSHIP INSTITUTE | 100,000 | 100,000 | - | 0% | 100,000 | 100,000 |
| | **52840** | ED TRAVEL & OUTREACH | 6,000 | 6,000 | - | 0% | 4,883 | 3,010 |
| | **TOTAL DIRECT EXPENSES** | | **142,635** | **137,925** | **(4,710)** | **-3%** | **134,809** | **110,643** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 643,856 | 669,779 | 25,923 | 4% | 611,429 | 329,991 |
| | **51299** | BENEFITS EXPENSE | 142,505 | 155,599 | 13,094 | 9% | 161,753 | 78,057 |
| | **51900** | OTHER INDIRECT EXPENSE | 145,659 | 134,960 | (10,699) | -7% | 99,941 | 63,713 |
| | **TOTAL INDIRECT EXPENSES:** | | **932,020** | **960,339** | **28,319** | **3%** | **873,123** | **471,761** |
| | **TOTAL ALL EXPENSES:** | | **1,074,655** | **1,098,264** | **23,609** | **2%** | **1,007,932** | **582,405** |
| | **NET INCOME (LOSS):** | | **(1,074,655)** | **(1,098,264)** | **(23,609)** | **2%** | **(1,007,932)** | **(582,405)** |

## Washington State Bar Association
### Budget Comparison

## OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD

**Cost Center** **FY27 FTE** **1.40**
**OGCDB** **FY26 FTE** **1.30**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50110** | STAFF CONFERENCE & TRAINING | 2,200 | 250 | (1,950) | -89% | - | - |
| | **50120** | STAFF MEMBERSHIP DUES | 100 | 100 | - | 0% | - | - |
| | **54310** | COURT REPORTERS | 33,100 | 35,000 | 1,900 | 6% | 25,922 | 23,830 |
| | **55310** | DISCIPLINARY BOARD EXPENSES | 3,000 | 3,000 | - | 0% | 1,548 | - |
| | **55320** | CHIEF HEARING OFFICER | 41,200 | 41,200 | - | 0% | 39,996 | 19,998 |
| | **55330** | HEARING OFFICER EXPENSES | 4,000 | 2,500 | (1,500) | -38% | 377 | 149 |
| | **55340** | HEARING OFFICER TRAINING | 1,000 | 2,500 | 1,500 | 150% | - | 900 |
| | **55370** | APPOINTED COUNSEL | 50,645 | 52,200 | 1,555 | 3% | 50,400 | 25,270 |
| | **55380** | DISCIPLINARY SELECTION PANEL | 1,000 | 500 | (500) | -50% | - | - |
| | **TOTAL DIRECT EXPENSES** | | **136,245** | **137,250** | **1,005** | **1%** | **118,243** | **70,147** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 128,774 | 150,717 | 21,943 | 17% | 128,615 | 67,438 |
| | **51299** | BENEFITS EXPENSE | 37,003 | 34,902 | (2,102) | -6% | 39,935 | 19,627 |
| | **51900** | OTHER INDIRECT EXPENSE | 44,765 | 45,202 | 437 | 1% | 30,678 | 19,610 |
| | **TOTAL INDIRECT EXPENSES:** | | **210,543** | **230,821** | **20,278** | **10%** | **199,228** | **106,675** |
| | **TOTAL ALL EXPENSES:** | | **346,788** | **368,071** | **21,283** | **6%** | **317,472** | **176,822** |
| | **NET INCOME (LOSS):** | | **(346,788)** | **(368,071)** | **(21,283)** | **6%** | **(317,472)** | **(176,822)** |

## Washington State Bar Association
**Budget Comparison**

## PRACTICE OF LAW BOARD

**Cost Center** **FY27 FTE** **0.53**
**PLB** **FY26 FTE** **0.55**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 200 | 200 | - | 0% | - | - |
| | **55510** | PRACTICE OF LAW BOARD | 16,000 | 3,000 | (13,000) | -81% | 740 | 197 |
| | **TOTAL DIRECT EXPENSES** | | **16,200** | **3,200** | **(13,000)** | **-80%** | **740** | **197** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 63,145 | 78,102 | 14,958 | 24% | 42,930 | 32,194 |
| | **51299** | BENEFITS EXPENSE | 16,771 | 20,805 | 4,034 | 24% | 13,655 | 8,753 |
| | **51900** | OTHER INDIRECT EXPENSE | 18,939 | 16,951 | (1,988) | -10% | 10,644 | 8,314 |
| | **TOTAL INDIRECT EXPENSES:** | | **98,855** | **115,858** | **17,004** | **17%** | **67,229** | **49,260** |
| | **TOTAL ALL EXPENSES:** | | **115,055** | **119,058** | **4,004** | **3%** | **67,969** | **49,457** |
| | **NET INCOME (LOSS):** | | **(115,055)** | **(119,058)** | **(4,004)** | **3%** | **(67,969)** | **(49,457)** |

## Washington State Bar Association
### Budget Comparison

## PRACTICE MANAGEMENT ASSISTANCE

**Cost Center** **FY27 FTE** **1.28**
**PMA** **FY26 FTE** **0.95**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **40900** | ROYALTIES | 62,000 | 66,000 | 4,000 | 6% | 68,618 | 39,349 |
| | **TOTAL REVENUE** | | **62,000** | **66,000** | **4,000** | **6%** | **68,618** | **39,349** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 2,500 | 1,500 | (1,000) | -40% | 265 | 906 |
| | **50110** | STAFF CONFERENCE & TRAINING | 2,400 | 2,500 | 100 | 4% | 3,003 | 563 |
| | **50120** | STAFF MEMBERSHIP DUES | 295 | 295 | - | 0% | 195 | - |
| | **50130** | SUBSCRIPTIONS | - | 500 | 500 | | - | - |
| | **54645** | LEGAL TECH TASK FORCE | 3,500 | - | (3,500) | -100% | 2,750 | - |
| | **55250** | VLEX FASTCASE | 87,000 | 90,000 | 3,000 | 3% | 84,568 | 87,812 |
| | **TOTAL DIRECT EXPENSES** | | **95,695** | **94,795** | **(900)** | **-1%** | **90,781** | **89,281** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 92,930 | 112,419 | 19,490 | 21% | 91,575 | 49,427 |
| | **51299** | BENEFITS EXPENSE | 26,882 | 33,214 | 6,332 | 24% | 28,732 | 14,021 |
| | **51900** | OTHER INDIRECT EXPENSE | 32,713 | 41,328 | 8,615 | 26% | 22,311 | 14,279 |
| | **TOTAL INDIRECT EXPENSES:** | | **152,525** | **186,961** | **34,436** | **23%** | **142,618** | **77,727** |
| | **TOTAL ALL EXPENSES:** | | **248,220** | **281,756** | **33,536** | **14%** | **233,399** | **167,008** |
| | **NET INCOME (LOSS):** | | **(186,220)** | **(215,756)** | **(29,536)** | **16%** | **(164,781)** | **(127,659)** |

## Washington State Bar Association
**Budget Comparison**

## PROFESSIONAL RESPONSIBILITY PROGRAM

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **1.80** |
| **PRP** | **FY26 FTE** | **1.08** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | **-** | **-** | **-** | | **-** | **-** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 4,000 | 3,500 | (500) | -13% | 1,083 | 1,432 |
| | **50110** | STAFF CONFERENCE & TRAINING | 2,400 | 2,200 | (200) | -8% | 2,347 | - |
| | **50120** | STAFF MEMBERSHIP DUES | 590 | 690 | 100 | 17% | 590 | 590 |
| | **55610** | CPE COMMITTEE | 1,000 | 1,000 | - | 0% | 286 | - |
| | **TOTAL DIRECT EXPENSES** | | **7,990** | **7,390** | **(600)** | **-8%** | **4,305** | **2,022** |
| **INDIRECT EXPENSES:** | | | | | - | | | |
| | **51199** | SALARY EXPENSE | 143,536 | 179,064 | 35,528 | 25% | 142,101 | 70,323 |
| | **51299** | BENEFITS EXPENSE | 36,061 | 76,673 | 40,612 | 113% | 39,029 | 18,498 |
| | **51900** | OTHER INDIRECT EXPENSE | 37,190 | 58,117 | 20,927 | 56% | 25,449 | 16,205 |
| | **TOTAL INDIRECT EXPENSES:** | | **216,787** | **313,855** | **97,068** | **45%** | **206,580** | **105,025** |
| | **TOTAL ALL EXPENSES:** | | **224,777** | **321,245** | **96,468** | **43%** | **210,885** | **107,048** |
| | **NET INCOME (LOSS):** | | **(224,777)** | **(321,245)** | **(96,468)** | **43%** | **(210,885)** | **(107,048)** |

## Washington State Bar Association
### Budget Comparison

**PUBLIC SERVICE PROGRAMS**

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **2.13** |
| **PSP** | **FY26 FTE** | **2.10** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **40300** | DONATIONS & GRANTS | 132,635 | 118,317 | (14,318) | -11% | 134,832 | 2,639 |
| | **TOTAL REVENUE** | | **132,635** | **118,317** | **(14,318)** | **-11%** | **134,832** | **2,639** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50037** | MODERATE MEANS | - | - | - | | 250,352 | (5,178) |
| | **50100** | STAFF TRAVEL/PARKING | 2,000 | 3,700 | 1,700 | 85% | 445 | 39 |
| | **50110** | STAFF CONFERENCE & TRAINING | 3,200 | 2,500 | (700) | -22% | 1,654 | - |
| | **52110** | PRO BONO & PUBLIC SERVICE COMMITTEE | 3,500 | 7,500 | 4,000 | 114% | 2,361 | 1,882 |
| | **54130** | PRO BONO OUTREACH | 4,000 | 6,000 | 2,000 | 50% | 2,127 | - |
| | **TOTAL DIRECT EXPENSES** | | **12,700** | **19,700** | **7,000** | **55%** | **256,939** | **(3,257)** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 187,614 | 193,131 | 5,517 | 3% | 136,510 | 82,782 |
| | **51299** | BENEFITS EXPENSE | 50,197 | 60,352 | 10,155 | 20% | 45,949 | 26,751 |
| | **51900** | OTHER INDIRECT EXPENSE | 72,313 | 68,772 | (3,541) | -5% | 38,347 | 28,638 |
| | **TOTAL INDIRECT EXPENSES:** | | **310,124** | **322,255** | **12,131** | **4%** | **220,806** | **138,171** |
| | **TOTAL ALL EXPENSES:** | | **322,824** | **341,955** | **19,131** | **6%** | **477,745** | **134,914** |
| | **NET INCOME (LOSS):** | | **(190,189)** | **(223,638)** | **(33,449)** | **18%** | **(342,913)** | **(132,275)** |

## Washington State Bar Association
**Budget Comparison**

## PUBLICATION & DESIGN SERVICES

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **0.89** |
| **PUB** | **FY26 FTE** | **0.89** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50130** | SUBSCRIPTIONS | 200 | 200 | - | 0% | 88 | - |
| | **54026** | IMAGE LIBRARY | 4,800 | 4,800 | - | 0% | 4,756 | 4,756 |
| | **TOTAL DIRECT EXPENSES** | | **5,000** | **5,000** | **-** | **0%** | **4,844** | **4,756** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 70,644 | 73,597 | 2,953 | 4% | 81,302 | 36,102 |
| | **51299** | BENEFITS EXPENSE | 22,914 | 28,851 | 5,937 | 26% | 26,149 | 12,109 |
| | **51900** | OTHER INDIRECT EXPENSE | 30,647 | 28,736 | (1,911) | -6% | 20,917 | 13,434 |
| | **TOTAL INDIRECT EXPENSES:** | | **124,205** | **131,184** | **6,979** | **6%** | **128,367** | **61,644** |
| | **TOTAL ALL EXPENSES:** | | **129,205** | **136,184** | **6,979** | **5%** | **133,212** | **66,400** |
| | **NET INCOME (LOSS):** | | **(129,205)** | **(136,184)** | **(6,979)** | **5%** | **(133,212)** | **(66,400)** |

## Washington State Bar Association
### Budget Comparison

**REGULATORY SERVICES FTE**

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **2.10** |
| **RSD FTE** | **FY26 FTE** | **2.00** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | - | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 600 | 600 | - | 0% | 864 | 106 |
| | **50110** | STAFF CONFERENCE & TRAINING | 11,500 | 13,800 | 2,300 | 20% | 2,172 | 734 |
| | **50120** | STAFF MEMBERSHIP DUES | 490 | 490 | - | 0% | 490 | 490 |
| | **TOTAL DIRECT EXPENSES** | | **12,590** | **14,890** | **2,300** | **18%** | **3,526** | **1,330** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 288,255 | 292,306 | 4,050 | 1% | 300,342 | 140,610 |
| | **51299** | BENEFITS EXPENSE | 68,347 | 79,097 | 10,750 | 16% | 81,381 | 34,959 |
| | **51900** | OTHER INDIRECT EXPENSE | 68,870 | 67,803 | (1,066) | -2% | 52,644 | 30,061 |
| | **TOTAL INDIRECT EXPENSES:** | | **425,472** | **439,205** | **13,734** | **3%** | **434,368** | **205,630** |
| | **TOTAL ALL EXPENSES:** | | **438,062** | **454,095** | **16,034** | **4%** | **437,894** | **206,961** |
| | **NET INCOME (LOSS):** | | **(438,062)** | **(454,095)** | **(16,034)** | **4%** | **(437,894)** | **(206,961)** |

## Washington State Bar Association
**Budget Comparison**

## REGULATORY REFORM

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **0.25** |
| **RR** | **FY26 FTE** | **0.85** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | - | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50033** | CONSULTING SERVICES | 25,000 | 30,000 | 5,000 | 20% | 14,311 | 8,828 |
| | **50185** | MEETING EXPENSE | 2,000 | - | (2,000) | -100% | 2,098 | - |
| | **52691** | OUTREACH EXPENSES | 10,000 | 10,000 | - | 0% | - | - |
| | **53282** | SOFTWARE HOSTING | 20,000 | - | (20,000) | -100% | - | - |
| | **TOTAL DIRECT EXPENSES** | | **57,000** | **40,000** | **(17,000)** | **-30%** | **16,409** | **8,828** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 110,346 | 37,247 | (73,099) | -66% | 155,273 | 57,534 |
| | **51299** | BENEFITS EXPENSE | 27,639 | 9,370 | (18,269) | -66% | 43,259 | 14,424 |
| | **51900** | OTHER INDIRECT EXPENSE | 29,270 | 8,072 | (21,198) | -72% | 28,992 | 12,775 |
| | **TOTAL INDIRECT EXPENSES:** | | **167,255** | **54,689** | **(112,566)** | **-67%** | **227,523** | **84,733** |
| | **TOTAL ALL EXPENSES:** | | **224,255** | **94,689** | **(129,566)** | **-58%** | **243,933** | **93,561** |
| | **NET INCOME (LOSS):** | | **(224,255)** | **(94,689)** | **129,566** | **-58%** | **(243,933)** | **(93,561)** |

## Washington State Bar Association
### Budget Comparison

## SECTIONS ADMINISTRATION

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **2.53** |
| **SECT** | **FY26 FTE** | **2.53** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **48010** | REIMBURSEMENTS FROM SECTIONS | 275,000 | 275,000 | - | 0% | 276,103 | 388,434 |
| | **TOTAL REVENUE** | | **275,000** | **275,000** | **-** | **0%** | **276,103** | **388,434** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50100** | STAFF TRAVEL/PARKING | 1,900 | 2,000 | 100 | 5% | 60 | 336 |
| | **50120** | STAFF MEMBERSHIP DUES | - | - | - | | 60 | - |
| | **52540** | SECTION/COMMITTEE CHAIR MTGS | 500 | 400 | (100) | -20% | 89 | 71 |
| | **TOTAL DIRECT EXPENSES** | | **2,400** | **2,400** | **-** | **0%** | **209** | **407** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 174,309 | 180,803 | 6,494 | 4% | 164,849 | 89,577 |
| | **51299** | BENEFITS EXPENSE | 61,514 | 91,313 | 29,799 | 48% | 64,054 | 32,387 |
| | **51900** | OTHER INDIRECT EXPENSE | 87,120 | 81,686 | (5,433) | -6% | 60,273 | 38,138 |
| | **TOTAL INDIRECT EXPENSES:** | | **322,943** | **353,803** | **30,860** | **10%** | **289,176** | **160,102** |
| | **TOTAL ALL EXPENSES:** | | **325,343** | **356,203** | **30,860** | **9%** | **289,385** | **160,510** |
| | **NET INCOME (LOSS):** | | **(50,343)** | **(81,203)** | **(30,860)** | **61%** | **(13,283)** | **227,925** |

## Washington State Bar Association
### Budget Comparison

**TECHNOLOGY**

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **5.00** |
| **TECH** | **FY26 FTE** | **5.00** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50033** | CONSULTING SERVICES | 1,019,797 | 930,000 | (89,797) | -9% | 318,690 | 386,511 |
| | **50100** | STAFF TRAVEL/PARKING | 1,000 | 1,000 | - | 0% | 1,341 | 198 |
| | **50110** | STAFF CONFERENCE & TRAINING | 6,000 | 3,000 | (3,000) | -50% | 1,091 | - |
| | **50120** | STAFF MEMBERSHIP DUES | 410 | 300 | (110) | -27% | - | - |
| | **50160** | TELEPHONE | 90,000 | 95,000 | 5,000 | 6% | 91,817 | 46,960 |
| | **55911** | CLOUD INFRASTRUCTURE | 130,000 | 130,000 | - | 0% | 66,849 | 25,643 |
| | **56100** | COMPUTER HARDWARE | 65,000 | 80,000 | 15,000 | 23% | 66,055 | 41,040 |
| | **56150** | COMPUTER SOFTWARE | 518,000 | 476,000 | (42,000) | -8% | 362,082 | 249,256 |
| | **56225** | HARDWARE SERVICE & WARRANTIES | 50,000 | 50,000 | - | 0% | 41,848 | 14,413 |
| | **56230** | SOFTWARE MAINT & LICENSING | 470,000 | 410,000 | (60,000) | -13% | 362,502 | 212,740 |
| | **56550** | THIRD PARTY SERVICES | 177,600 | 180,000 | 2,400 | 1% | 97,718 | 104,166 |
| | **56900** | TRANSFER TO INDIRECT EXPENSES | (2,527,807) | (2,355,300) | 172,507 | -7% | (1,409,992) | (1,080,926) |
| | **TOTAL DIRECT EXPENSES** | | - | - | - | | **(0)** | **0** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 629,276 | 620,846 | (8,431) | -1% | 1,431,745 | 358,519 |
| | **51299** | BENEFITS EXPENSE | 158,341 | 172,646 | 14,304 | 9% | 373,331 | 88,928 |
| | **51955** | CAPITAL LABOR & OVERHEAD | - | - | - | | (104,685) | (16,181) |
| | **51900** | OTHER INDIRECT EXPENSE | 172,174 | 161,436 | (10,738) | -6% | 284,119 | 75,221 |
| | **TOTAL INDIRECT EXPENSES:** | | **959,791** | **954,927** | **(4,864)** | **-1%** | **1,984,511** | **506,487** |
| | **TOTAL ALL EXPENSES:** | | **959,791** | **954,927** | **(4,864)** | **-1%** | **1,984,511** | **506,487** |
| | **NET INCOME (LOSS):** | | **(959,791)** | **(954,927)** | **4,864** | **-1%** | **(1,984,511)** | **(506,487)** |

## Washington State Bar Association
**Budget Comparison**

## VOLUNTEER ENGAGEMENT

| | | |
|---|---|---|
| **Cost Center** | **FY27 FTE** | **1.70** |
| **VE** | **FY26 FTE** | **1.70** |

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **TOTAL REVENUE** | | - | - | - | | - | - |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50060** | POSTAGE | 600 | 600 | - | 0% | 468 | - |
| | **50110** | STAFF CONFERENCE & TRAINING | 4,500 | 2,000 | (2,500) | -56% | 3,554 | 1,653 |
| | **50120** | STAFF MEMBERSHIP DUES | 385 | 500 | 115 | 30% | 300 | 424 |
| | **50130** | SUBSCRIPTIONS | 816 | 817 | 1 | 0% | 881 | 358 |
| | **52520** | ABA DELEGATES | 18,000 | 16,000 | (2,000) | -11% | 12,947 | 6,876 |
| | **52521** | VOLUNTEER RECOGNITION | 2,000 | 2,000 | - | 0% | 39 | 660 |
| | **52522** | WSBA REPRESENTATIVE | - | 500 | 500 | | - | - |
| | **57450** | REGULATORY SCHOOL | 10,000 | 6,000 | (4,000) | -40% | 7,767 | 5,286 |
| | **TOTAL DIRECT EXPENSES** | | **36,301** | **28,417** | **(7,884)** | **-22%** | **25,956** | **15,258** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 149,220 | 156,097 | 6,877 | 5% | 116,711 | 74,519 |
| | **51299** | BENEFITS EXPENSE | 45,777 | 50,615 | 4,838 | 11% | 40,443 | 24,055 |
| | **51900** | OTHER INDIRECT EXPENSE | 58,539 | 54,888 | (3,651) | -6% | 34,541 | 25,550 |
| | **TOTAL INDIRECT EXPENSES:** | | **253,536** | **261,600** | **8,064** | **3%** | **191,695** | **124,124** |
| | **TOTAL ALL EXPENSES:** | | **289,837** | **290,017** | **180** | **0%** | **217,651** | **139,381** |
| | **NET INCOME (LOSS):** | | **(289,837)** | **(290,017)** | **(180)** | **0%** | **(217,651)** | **(139,381)** |

# ATTACHMENT B

## Washington State Bar Association
### Budget Comparison

## CLE - PRODUCTS

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Cost Center** | **FY27 FTE** | **1.29** | | | | | | |
| **CLEP** | **FY26 FTE** | **1.29** | | | | | | |
| | | | **FY2026 Budget** | **FY2027 Budget** | **FY26 vs. FY27 Comparison** | **% Change** | **FY2025 Actuals YTD** | **FY2026 Actuals YTD** |
| **REVENUE:** | | | | | | | | |
| | **41000** | SHIPPING & HANDLING | 210 | - | (210) | -100% | 117 | 36 |
| | **43200** | COURSEBOOK SALES | 3,500 | 3,500 | - | 0% | 980 | 325 |
| | **43400** | DIGITAL VIDEO SALES | 875,000 | 900,000 | 25,000 | 3% | 877,630 | 518,507 |
| | **TOTAL REVENUE** | | **878,710** | **903,500** | **24,790** | **3%** | **878,727** | **518,868** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50034** | IT EXPENSE DUE TO GF | 179 | - | (179) | -100% | - | 64 |
| | **50120** | STAFF MEMBERSHIP DUES | 300 | 250 | (50) | -17% | - | 218 |
| | **52240** | DISABILITY ACCOMMODATIONS | 2,000 | 2,000 | - | 0% | - | 149 |
| | **53220** | COST OF SALES - COURSEBOOKS | 300 | - | (300) | -100% | 69 | 27 |
| | **53260** | OBSOLETE INVENTORY | - | - | - | | - | - |
| | **53255** | CLE-EQUIP-DEPRECIATION | - | - | - | | 2,039 | - |
| | **53285** | ONLINE PRODUCT HOSTING EXPENSES | 54,000 | 30,000 | (24,000) | -44% | 47,861 | 17,851 |
| | **53330** | POSTAGE & DELIVRY-COURSEBOOKS | 200 | - | (200) | -100% | 59 | 28 |
| | **TOTAL DIRECT EXPENSES** | | **56,979** | **32,250** | **(24,729)** | **-43%** | **50,028** | **18,337** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 99,556 | 103,642 | 4,087 | 4% | 103,349 | 53,413 |
| | **51299** | BENEFITS EXPENSE | 32,846 | 47,112 | 14,265 | 43% | 35,415 | 17,922 |
| | **51900** | OTHER INDIRECT EXPENSE | 37,620 | 41,650 | 4,030 | 11% | 30,230 | 16,927 |
| | **51936** | FACILITY RESERVE REBATE | - | - | - | | (1,532) | - |
| | **TOTAL INDIRECT EXPENSES:** | | **170,023** | **192,405** | **22,382** | **13%** | **167,462** | **88,262** |
| | **TOTAL ALL EXPENSES:** | | **227,002** | **224,655** | **(2,347)** | **-1%** | **217,491** | **106,598** |
| | **NET INCOME (LOSS):** | | **651,708** | **678,845** | **27,137** | **4%** | **661,236** | **412,270** |

## Washington State Bar Association
### Budget Comparison

## CLE - SEMINARS

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **Cost Center** | **FY27 FTE** | **6.37** | | | | | | |
| **CLES** | **FY26 FTE** | **6.66** | | | | | | |
| **REVENUE:** | | | | | | | | |
| | **41800** | SEMINAR REGISTRATIONS | 730,535 | 666,890 | (63,645) | -9% | 543,543 | 151,283 |
| | **41825** | SEMINAR REVENUE-OTHER | 32,500 | 35,500 | 3,000 | 9% | 27,915 | 16,000 |
| | **41850** | SEMINAR SPLITS W/ CLE | (150,000) | (135,000) | 15,000 | -10% | (100,979) | - |
| | **TOTAL REVENUE** | | **613,035** | **567,390** | **(45,645)** | **-7%** | **470,479** | **167,283** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50034** | IT EXPENSE DUE TO GF | 924 | - | (924) | -100% | - | 336 |
| | **50100** | STAFF TRAVEL/PARKING | 16,500 | 20,215 | 3,715 | 23% | 10,336 | 2,721 |
| | **50110** | STAFF CONFERENCE & TRAINING | 3,700 | 2,200 | (1,500) | -41% | - | - |
| | **50120** | STAFF MEMBERSHIP DUES | 1,200 | 1,000 | (200) | -17% | - | 873 |
| | **50130** | SUBSCRIPTIONS | 1,300 | 800 | (500) | -38% | - | - |
| | **50140** | SUPPLIES | 1,000 | 1,000 | - | 0% | 236 | 41 |
| | **52240** | DISABILITY ACCOMMODATIONS | 5,000 | 5,000 | - | 0% | - | 2,063 |
| | **53610** | COURSEBOOK PRODUCTION | 150 | 150 | - | 0% | - | - |
| | **53640** | ACCREDITATION FEES | 2,500 | 2,250 | (250) | -10% | 1,752 | 2,040 |
| | **53690** | FACILITIES | 175,000 | 189,900 | 14,900 | 9% | 164,373 | 47,107 |
| | **53700** | SPEAKERS & PROGRAM DEVELOP | 45,700 | 49,200 | 3,500 | 8% | 25,859 | 6,666 |
| | **53730** | HONORARIUM | 3,000 | 3,000 | - | 0% | - | - |
| | **53740** | CLE SEMINAR COMMITTEE | 200 | - | (200) | -100% | - | - |
| | **TOTAL DIRECT EXPENSES** | | **256,174** | **274,715** | **18,541** | **7%** | **202,557** | **61,847** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 514,912 | 517,956 | 3,045 | 1% | 503,823 | 262,372 |
| | **51299** | BENEFITS EXPENSE | 169,646 | 170,949 | 1,303 | 1% | 179,815 | 89,452 |
| | **51900** | OTHER INDIRECT EXPENSE | 194,227 | 205,669 | 11,443 | 6% | 158,619 | 87,610 |
| | **51936** | FACILITY RESERVE REBATE | - | - | | | (7,969) | - |
| | **TOTAL INDIRECT EXPENSES:** | | **878,784** | **894,575** | **15,791** | **2%** | **834,288** | **439,434** |
| | **TOTAL ALL EXPENSES:** | | **1,134,958** | **1,169,290** | **34,331** | **3%** | **1,036,844** | **501,280** |
| | **NET INCOME (LOSS):** | | **(521,923)** | **(601,900)** | **(79,976)** | **15%** | **(566,365)** | **(333,998)** |

## Washington State Bar Association
### Budget Comparison

**DESKBOOKS**
**Cost Center** **FY27 FTE** **1.75**
**DESK** **FY26 FTE** **1.75**

| | | | FY2026 Budget | FY2027 Budget | FY26 vs. FY27 Comparison | % Change | FY2025 Actuals YTD | FY2026 Actuals YTD |
|---|---|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | | | |
| | **43100** | DESKBOOK SALES | 5,120 | 10,000 | 4,880 | 95% | 14,722 | 3,386 |
| | **43450** | SECTION PUBLICATION SALES | - | - | - | | 90 | 70 |
| | **43455** | LEXIS/NEXIS ROYALTIES | 75,000 | 96,000 | 21,000 | 28% | 67,020 | 20,594 |
| | **43525** | CASEMAKER ROYALTIES | 25,000 | 40,000 | 15,000 | 60% | 38,162 | 9,878 |
| | **TOTAL REVENUE** | | **105,120** | **146,000** | **40,880** | **39%** | **119,994** | **33,928** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50110** | STAFF CONFERENCE & TRAINING | 2,200 | 2,200 | - | 0% | 678 | 1,914 |
| | **50120** | STAFF MEMBERSHIP DUES | 330 | 558 | 228 | 69% | 285 | 218 |
| | **50130** | SUBSCRIPTIONS | 50 | 50 | - | 0% | - | - |
| | **53210** | COST OF SALES - DESKBOOKS | 2,800 | - | (2,800) | -100% | 2,453 | 1,195 |
| | **53225** | COST OF SALES - SECTION PUBLIC | - | - | - | | (74) | - |
| | **53260** | OBSOLETE INVENTORY | 118,700 | - | (118,700) | -100% | 48,248 | 65,597 |
| | **53270** | DESKBOOK ROYALTIES | - | - | - | | - | 193 |
| | **53320** | POSTAGE & DELIVRY-COURSEBOOKS | 300 | 300 | - | 0% | - | 21 |
| | **TOTAL DIRECT EXPENSES** | | **124,380** | **3,108** | **(121,272)** | **-98%** | **51,589** | **69,138** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 145,047 | 152,346 | 7,300 | 5% | 180,204 | 73,735 |
| | **51299** | BENEFITS EXPENSE | 45,925 | 51,152 | 5,227 | 11% | 52,319 | 24,091 |
| | **51900** | OTHER INDIRECT EXPENSE | 51,036 | 56,503 | 5,467 | 11% | 41,485 | 23,065 |
| | **TOTAL INDIRECT EXPENSES:** | | **242,008** | **260,001** | **17,993** | **7%** | **274,008** | **120,891** |
| | **TOTAL ALL EXPENSES:** | | **366,387** | **263,109** | **(103,279)** | **-28%** | **325,596** | **190,029** |
| | **NET INCOME (LOSS):** | | **(261,267)** | **(117,109)** | **144,159** | **-55%** | **(205,602)** | **(156,101)** |

# ATTACHMENT C

## Washington State Bar Association
### Budget Comparison

## CLIENT PROTECTION FUND

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Cost Center** | **FY27 FTE** | **1.23** | **FY2026 Budget** | **FY2027 Budget** | **FY26 vs. FY27 Comparison** | **% Change** | **FY2025 Actuals YTD** | **FY2026 Actuals YTD** |
| **CPF** | **FY26 FTE** | **1.23** | | | | | | |
| **REVENUE:** | | | | | | | | |
| | **40300** | DONATIONS & GRANTS | - | - | - | | 2,000 | 4,500 |
| | **40500** | INTEREST - INVESTMENTS | 200,000 | 145,000 | (55,000) | -28% | 220,403 | 98,924 |
| | **44820** | CPF RESTITUTION | 10,000 | 10,000 | - | 0% | 20,766 | 3,352 |
| | **44840** | CPF MEMBER ASSESSMENTS | 735,480 | - | (735,480) | -100% | 732,050 | 711,290 |
| | **TOTAL REVENUE** | | **945,480** | **155,000** | **(790,480)** | **-84%** | **975,219** | **818,066** |
| **DIRECT EXPENSES:** | | | | | | | | |
| | **50020** | BANK FEES | 500 | 500 | - | 0% | (3,317) | (94) |
| | **50110** | STAFF CONFERENCE & TRAINING | 4,400 | 4,400 | - | 0% | - | - |
| | **50120** | STAFF MEMBERSHIP DUES | 200 | 200 | - | 0% | 200 | - |
| | **54400** | TRANSLATION SERVICES | - | 5,000 | 5,000 | | - | - |
| | **54810** | GIFTS TO INJURED CLIENTS | 500,000 | 500,000 | - | 0% | 249,483 | 15,700 |
| | **54820** | CPF BOARD | 2,000 | 1,500 | (500) | -25% | 553 | 864 |
| | **TOTAL DIRECT EXPENSES** | | **507,100** | **511,600** | **4,500** | **1%** | **246,919** | **16,471** |
| **INDIRECT EXPENSES:** | | | | | | | | |
| | **51199** | SALARY EXPENSE | 117,501 | 116,408 | (1,093) | -1% | 116,232 | 60,510 |
| | **51299** | BENEFITS EXPENSE | 34,425 | 42,551 | 8,126 | 24% | 36,854 | 17,984 |
| | **51900** | OTHER INDIRECT EXPENSE | 42,355 | 39,713 | (2,642) | -6% | 28,935 | 18,529 |
| | **51936** | FACILITY RESERVE REBATE | - | - | | | (1,461) | - |
| | **TOTAL INDIRECT EXPENSES:** | | **194,280** | **198,672** | **4,392** | **2.3%** | **180,560** | **97,022** |
| | **TOTAL ALL EXPENSES:** | | **701,380** | **710,272** | **8,892** | **1%** | **427,479** | **113,493** |
| | **NET INCOME (LOSS):** | | **244,100** | **(555,272)** | **(799,372)** | **-327%** | **547,740** | **704,573** |

# ATTACHMENT D

# 2027 WSBA BUDGET WORKSHEET
## CAPITAL BUDGET

| | COST CENTER | UNIT COST | QTY | AMOUNT | USEFUL LIFE (YRS) | ESTIMATED IN SERVICE DATE | ANNUAL DEPRECIATION EXPENSE | BUDGET FY 2027 |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | |
| **Capital Hardware (General Indirects):** | | | | | | | | |
| Hardware replacements | INDIRECT | 60,000 | 1 | 60,000 | 3 | Jan-27 | 20,000 | 15,000 |
| | | | | | | | | |
| | | | | | | | | |
| **Total** | | | | **60,000** | | | **20,000** | **15,000** |
| | | | | | | | | |
| **Leasehold Improvements (General Indirects)** | | | | | | | | |
| Camera System Upgrade | INDIRECT | 7,000 | 1 | 7,000 | 9 | Oct-26 | 814 | 814 |
| | | | | | | | | |
| | | | | | | | | |
| **Equipment (General Indirects)** | | | | | | | | |
| Mail machine replacement | INDIRECT | 13,366 | 1 | 13,366 | 5 | Oct-26 | 2,673 | 2,673 |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| **Total** | | | | **20,366** | | | **3,487** | **3,487** |
| | | | | | | | | |
| **GRAND TOTAL** | | | | **80,366** | | | **23,487** | **18,487** |

# ATTACHMENT E

# WSBA BUDGET GLOSSARY

**Accrual Basis:** The basis of accounting whereby revenues are recognized when earned and measurable regardless of when collected; and expenses are recorded when incurred.

**Capital Asset:** Washington State Bar Association (WSBA) fiscal policies identify this as an item that costs over $2,500 and has a useful life of over 1 year. Capital assets are depreciated over their identified useful life.

**Capital Budget:** The capital budget forecasts capital asset purchases and capital labor hours anticipated in the coming fiscal year. It reflects the total cash outlay for the organization to purchase or develop assets that are depreciated over the life of the asset. This is reflected in the annual budget as depreciation expense. The Board of Governors reviews and approves the final capital budget, with the entire WSBA budget, at its last meeting of the fiscal year (September).

**Capital Labor:** Work performed by WSBA employees to develop internally used software systems. Employee hours spent developing software is considered a capital asset and the cost of the labor is depreciated over the useful life of the asset.

**Cash Basis:** The basis for accounting whereby revenues are recorded only when received and expenses are recorded only when paid, without regard to the period in which they were earned or incurred.

**Cost Center:** A unit within WSBA that reflects a program or resource. WSBA's financial activities are reported by cost center, meaning both revenue and expenses are included under the financial report for each identified cost center. WSBA has a total of 74 cost centers (29 of which are individual Sections). For a description of WSBA's cost centers, see the FY26 Budget, which includes narrative descriptions on pages 5 through 15.

**Department:** A division within WSBA that outlines a specific area of activity. WSBA has 9 departments: Advancement, Finance, Human Resources, Information Technology, Office of Disciplinary Counsel, Office of the Executive Director, Office of General Counsel, and Regulatory Services.

**Depreciation:** The portion of the cost of a capital asset representing the value used over time, due in part to wear and tear, deterioration, and obsolescence, which is reflected as an expense during a particular period. Depreciation is calculated based on the cost of the capital asset divided by its estimated useful life. WSBA calculates depreciation monthly.

Expenses:

*Direct:* Expenses that are directly related to the support of a specific program or function of the WSBA. Examples include committee expenses or venue costs for putting on an event.

*Indirect:* Expenses that benefit the whole organization and are considered the basic cost of doing business. Examples include salaries, benefits, payroll taxes, rent, telephone, insurance, legal advice, auditing services, computer equipment, etc. There are numerous ways to allocate common expenses; however, the method chosen must be meaningful, reasonable, accurate, and consistently applied. Generally speaking, WSBA allocates costs based on the staff that are assigned to perform work within each cost center. The allocation of staff time to a cost center can range anywhere from 1-100% and many employees are allocated across multiple cost centers.

**Fiscal Year:** A 12-month accounting period that may not coincide with the calendar year. The WSBA's fiscal year is from October 1st to September 30th.

**FTE:** Full-time Equivalent position term is used to describe staffing positions. One FTE is based on 2,080 work hours in a 12-month year. WSBA has employees ranging from 0.5 FTE to 1.0 FTE.

**Fund Accounting:** An accounting method that is used to track the amount of money allocated to various operations at an organization. WSBA's fiscal policies outline four distinct funds:

*General Fund*: Houses the majority of WSBA's operations and is funded primarily by license fees. The General Fund comprises of 41 cost centers and the majority of WSBA's FTEs. WSBA's General Fund Reserves are used to support this fund (see "Reserves").

*Client Protection Fund*: In 1995, the Washington State Supreme Court and the WSBA created the Client Protection Fund (CPF). The purpose of this restricted fund is to relieve or mitigate a loss sustained by any person due to the dishonesty of, or failure to account for money or property entrusted to, any member of the WSBA in connection with the member's practice of law, or while acting as a fiduciary in a matter related to the member's practice of law. The CPF fund receives a mandatory annual assessment from each active lawyer, LLLT, and pro hac vice member of the WSBA. This fund reflects the financial activity for the CPF (1 cost center) and is supported by the CPF reserve fund.

*Continuing Legal Education Fund*: The fund includes financial activity for 3 cost centers: CLE Products, CLE Seminars, and Deskbooks, and the fund is supported by the CLE Reserve Fund.

*Sections Funds*: The total difference between revenues, and direct and indirect expenses, for all Sections each year are designated as Section funds. Separate ledgers are maintained for each Section, making up the total for the Section funds.

**Fund Balance:** The fund balances, or net assets, of the WSBA are the difference between assets and liabilities. Fund balances are either unrestricted or restricted. The Board of Governors may designate, and has designated, portions of the WSBA's unrestricted fund balance for specific purposes. During the annual budgeting process, the Budget & Audit Committee reviews all fund balances, determine if funds allocated to the various reserves should be adjusted while taking into account the goals and purposes of each fund, and make any recommendations for adjustments to the Board of Governors.

**Membership Year:** WSBA members are licensed on an annual basis, which is a calendar year beginning January 1st through December 31st.

**Per-Member Charge:** An amount charged for each Section membership to reimburse WSBA for the cost of administering Sections, which includes salaries, benefits, payroll taxes, overhead, and direct expenses. The Section Per-Member Charge (PMC) is calculated as part of the WSBA annual budget process and is based on the first draft of the fiscal year budget.

**Net Income:** Funds remaining after subtracting expenses from revenue. These funds are then added to the corresponding reserve fund as they are accumulated.

**Net Loss:** Funds needed after subtracting expenses from revenue. These funds are subtracted from the corresponding reserve fund as they are used.

**Reserves:** Funds set aside and/or accumulated over time from excess net income to support an identified or unanticipated future funding need. The WSBA Board of Governors creates and designates reserve funds, which can be unrestricted or restricted. All funds except one (Client Protection Fund) are unrestricted.

***General Fund Reserves:***

**Operating**- established to cover unanticipated expenses in the event of an emergency.

**Facilities**- established to support future facilities needs such as an office move or refurbishment of existing office space or preparation for the purchase of operational real estate.

**Special Projects & Innovation**- established to provide funding for the development of new and innovative programs, projects or products that support and advance the mission of the WSBA.

**License Fee Stability**- established to assist with stabilization of license fees over time. The fund may be used to offset revenue shortages during a budget cycle in lieu of raising license fees.

**Unrestricted**- This is the cumulative balance of net assets from General Fund operations not otherwise restricted or designated to any other fund.

***Continuing Legal Education Reserve:*** This reserve serves as an operating reserve in the event WSBA CLE suffers an unanticipated financial loss. The CLE reserve is funded by the annual operating income of the Deskbooks, CLE Seminars, and Products operations. Reserves may be used to cover any net loss, extraordinary costs, or technology upgrades.

***Client Protection Fund Reserves:*** This reserve serves as an operating reserve for the CPF fund. Annual net income or losses for the fund accumulated from year-to-year results in the CPF restricted fund balance.

***Sections Funds Reserves:*** An operating reserve fund for the WSBA sections, consisting of the cumulative balance of net assets/reserves of all sections.

**Useful Life:** The estimated amount of time an asset will remain in service and provide financial value.

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors

From: Budget and Audit Committee

Date: June 15, 2026

Re: Facility Reserve Fund Recommendation

**ACTION:** Approve the recommendation to allocate $150,000 to the Facilities Reserve from Unrestricted General Fund Reserves.

**BACKGROUND:**
The Facilities Reserve Fund is a Board designated fund established to support future facilities needs for WSBA's office space. Per fiscal policy, it is expected that the fund's value will increase as the WSBA gets closer to lease completion and the Budget and Audit Committee is responsible for making recommendations regarding the reserve fund balance. The WSBA renewed its most current office space lease in 2024, resulting in a use and reallocation of the Facilities Reserve. In FY 2025, the Board of Governors approved an allocation of $150,000 to the reserve fund (see **Attachment A** for reserve balances). As of April 30, 2026, the balance in the reserve is $159,491, of which $9,491 is earmarked for depreciation related to equipment purchased during the 2024 office downsizing project.

**RECOMMENDATION:**
In FY 2025, it was advised by WSBA's real estate brokers from JLL that approximately $1.5 million in reserves would be needed to move to another location. This was based on a calculation of $50/square foot x 27,000 square feet (rough approximation of WSBA's current office space) plus inflation. At the time, the WSBA's Facilities Advisory Subcommittee agreed that reserving funds over a longer period was preferred and believed that it would be manageable for WSBA to set aside $150,000 each year over the next 10 years to provide funding for the next office space.

At their meeting on June 15, 2026, the Budget and Audit Committee considered both the previous year's recommendation and the current information provided by JLL to assess whether it would be appropriate to deviate from the annual $150,000 allocation to the reserve for FY 2026. **The Committee voted unanimously to recommend that the Board of Governors approve a reallocation of $150,000 from Unrestricted General Fund Reserves to the Facilities Reserve Fund**.

**ATTACHMENT:**
A- Facilities Reserve History

# RESERVE HISTORY

- Facilities Advisory Subcommittee has historically been active during years leading up to a lease expiration.
- Facilities Reserve balance from 2006 to 2026:

| | |
|---|---|
| 2006 | $1,802,599 |
| 2007 | $1,445,000 |
| 2008 | $2,500,000 |
| 2009 | $2,500,000 |
| 2010 | $2,710,000 |
| 2011 | $3,340,000 |
| 2012 | $3,340,000 |
| 2013 | $3,340,000 |
| 2014 | $3,340,000 |
| 2015 | $3,286,096 |

Original Lease commencement

Build up of reserve fund in preparation for lease expiration in 2016

| | |
|---|---|
| 2016 | $2,114,427 |
| 2017 | $200,000 |
| 2018 | $450,000 |
| 2019 | $550,000 |
| 2020 | $550,000 |
| 2021 | $1,050,000 |
| 2022 | $1,000,000 |
| 2023 | $2,700,000 |
| 2024 | $207,286 |
| 2025 | $159,925 |
| Proposed 2026 | $309,181 |

Lease renewal

Build up of reserve fund in preparation for lease expiration in 2026

Lease renewal

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors

From: Budget and Audit Committee

Date: June 15, 2026

Re: License Fee Policy Revisions

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**DISCUSSION/FIRST READ:** Review proposed revisions to the WSBA License Fee Policy to include other categories of licensure.

**BACKGROUND**

WSBA License Fee Policy was adopted by the Board of Governors (BOG) on July 18, 2025. The purpose of the policy is to establish a consistent approach to setting license fees by which fees increase in alignment with an annual market measure 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. The current policy treats license fees as a uniform concept; however, the WSBA imposes distinct license fees that vary depending on the category of licensure. During the BOG's review and establishment of fees for Limited Practice Officers (LPO) and Limited License Legal Technicians (LLLT) in January 2026, it was determined that the policy requires revision to incorporate language reflecting the various licensure categories.

**PROPOSED REVISIONS**

The draft policy revisions (***Attachment A***) include a new section titled "*Application of Policy to Various License Types and Statuses*". This section details policy application, including any fee limits based on the license type (lawyer, LPO, LLLT, Judicial, Pro Bono) and status (active, inactive). The recommended percentage limitations are designed to maintain the existing differences in fees between license categories and statuses while also setting minimum fees to help cover operating expenses and reflect the relative value of the license in relation to the benefits covered.

At their June 15, 2026 meeting, the Budget and Audit Committee voted unanimously to recommend the revisions be presented to the Board of Governors.

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

Provided as confidential materials.

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

The proposed revisions to the license fee policy do not require any change to existing license fees set by the Board of Governors, which is in alignment with existing and proposed budgets. Additionally, any future application of the proposed policy revisions ensures continuity in the proportion of funding provided by each

license fee type to the WSBA's general fund budget. The fiscal impact of the proposed revisions is limited primarily to staff time used to draft the rule change language, incorporate the changes into relevant records, and communicate changes to stakeholders. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and does not require additional staff or allocation of resources from other internal sources.

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

This action has minimal concerns with regard to equity impacts. The proposal will update the existing license fee policies in ways that balance organizational costs while improving transparency and consistency with current fee structures, particularly for limited license types and non-active license fee statuses.

**ATTACHMENTS:**

Attachment A: License Fee Policy Draft Revisions (April 2026)

## 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. Policy

### a. Policy regarding growth of the license fee

In order to maintain existing programing and services, it is anticipated that license fees will be adjusted annually to account for increasing costs, including facilities, salaries and benefits, and direct costs. Adjustments 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, the WSBA should maintain reserves sufficient to seed desired shifts in programming, which will require adjustments to license fees to maintain.

### b. Policy 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 programing, 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 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.

### E. Application of Policy to Various License Types and Statuses

Unless otherwise stated, all license fees for all license types and statuses will be reviewed concurrently, using the policy framework and industry benchmark outlined in sections B and D.

a. **Active Lawyer.** The complete policy as written above applies to the active lawyer license fee.
b. **Inactive Lawyer.** The inactive lawyer license fee shall be set at no less than 30% and no more than 50% of the active lawyer license fee.
c. **Pro Bono.** The pro bono license fee shall be set at no less than 30% and no more than 50% of the active lawyer license fee.
d. **Judicial.** The judicial license fee shall be set at no less than 10% and no more than 20% of the active lawyer license fee.
e. **Active Limited License Legal Technician (LLLT).** The active LLLT license fee shall be set at no less than 30% and no more than 50% of the active lawyer license fee.
f. **Inactive Limited License Legal Technician (LLLT).** The inactive LLLT license fee shall be set at no less than 30% and no more than 50% of the active LLLT license fee.
g. **Active Limited Practice Officer (LPO).** The active LPO license fee shall be set at no less than 30% and no more than 50% of the active lawyer license fee.
h. **Inactive Limited Practice Officer (LPO).** The inactive LPO license fee shall be set at no less than 30% and no more than 50% of the active LPO license fee.

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Budget & Audit Committee

**DATE:** June 15, 2026

**RE:** Admissions Application Fees

---

**FIRST READ**: Discuss Budget & Audit Committee recommendation to establish an application fee for the new admissions pathway (admission by portfolio evaluation), increase the application fee for rule 9 licensed legal interns, and increase attorney applicant fees for the bar exam and UBE score transfer applications.

**Background**

Under Rule 3(i) of the Admission and Practice Rules (APR), applicants for admission to the practice of law in Washington are required to pay an application fee. The application fees are set by the Board of Governors and subject to review and approval by the Washington Supreme Court.

Application fees are used to cover both the direct and indirect expenses associated with the Admissions cost center. Currently, key functions under the Admissions cost center include processing applications, conducting investigations, holding character and fitness hearings, administering the twice-yearly bar exam, and administering the admission process after the application is approved. The Admissions cost center also includes the Board of Bar Examiners expenses including bar exam grading conferences and training sessions for the examiners. The Admissions cost center is a self-sustaining cost center meaning it is funded solely from application fees; no licensed legal professional license fees are used to fund the Admissions cost center.

Application fees were reviewed and the fees were increased for most applications effective September 1, 2024. At the time, we expected a need to review the application fees in three to five years. Implementation of the portfolio evaluation has brought that timetable forward.

At the Budget & Audit Committee's meeting on May 18, 2026, the Committee considered several proposals. At its June 15, 2026, meeting, the Committee approved the following recommendations for consideration by the Board of Governors.

**Recommendations from Budget & Audit Committee**

1. Increase the Rule 9 licensed legal intern application fee to $100, increasing by $25 annually until it reaches $200.
2. Discontinue the waiver of the application fee for interns providing legal services to low-income clients through a law school clinic program.
3. Align the application fees for attorney applicants seeking admission by bar exam or UBE score transfer with the application fees for all other attorney applications.
4. Establish an application fee for the new admission pathway – admission by portfolio evaluation—equal to the total amount paid by bar exam applicants.

The proposed application fees, to be effective January 1, 2027, are summarized in the following table.

| WSBA Application Fee | Current Fee | Proposed Fee (2027) | Change |
|---|---|---|---|
| Rule 9 Licensed Legal Intern | $50 (since Sept. 2004) | **$100** | $50 |
| Bar Exam - Attorney | $645 | **$970** | $325 |
| UBE Score Transfer – Attorney | $645 | **$970** | $325 |
| Portfolio Evaluation – General | N/A | **$740** | New |
| Portfolio Evaluation – Attorney | N/A | **$1,115** | New |

In addition, the rule 9 licensed legal intern application fee would increase annually on January 1 as follows:

| Application Fee Type | Current WSBA Application Fee | Proposed WSBA Application Fee |
|---|---|---|
| Rule 9 Licensed Legal Intern | $50 | **$100 (2027)** |
| Rule 9 Licensed Legal Intern | [redacted] | **$125 (2028)** |
| Rule 9 Licensed Legal Intern | | **$150 (2029)** |
| Rule 9 Licensed Legal Intern | | **$175 (2030)** |
| Rule 9 Licensed Legal Intern | | **$200 (2031)** |

**Attorney Applicants for the Bar Exam and UBE Score Transfer**

The standard practice for setting application fees has been to set higher fees for individuals already admitted to practice law in another jurisdiction. This approach is intended to assist those who are entering the legal profession for the first time by maintaining comparatively lower admission costs for them.

In determining an appropriate application fee for the admission by portfolio evaluation, we discovered that the application fees for attorney applicants for the bar exam and UBE score transfer were not increased to the same level as other pathways for attorney applicants. This oversight allows applicants to select the less expensive application, creating an opportunity for individuals who qualify through multiple avenues to engage in application selection based on price considerations. For example, an Oregon lawyer with at least one year of legal experience and a valid UBE score could apply for admission by UBE score transfer for $645 or by motion for $970. Ideally, application fees should be uniform for all licensed lawyers regardless of their chosen method for seeking admission. Accordingly, for consistency and fairness, and to prevent unintentional revenue loss, we recommend increasing the attorney bar exam and UBE score transfer application fees to $970. Proposed and current attorney applicant fees for all application types are listed below.

| Application Fee Type | Current WSBA Application Fee | Proposed WSBA Application Fee |
|---|---|---|
| Bar Exam - Attorney | $645 | **$970** |
| UBE Score Transfer – Attorney | $645 | **$970** |
| Admission by Motion – Attorney | $970 | $970 (unchanged) |
| House Counsel | $970 | $970 (unchanged) |
| Foreign Law Consultant | $970 | $970 (unchanged) |

**Rule 9 Licensed Legal Intern Application Fee**
Licensed legal interns under APR 9 receive a limited license to practice law under the supervision of a supervising lawyer. Typically, individuals obtain the license while enrolled in law school or participating in the APR 6 law clerk program but can also apply for the license after graduation prior to being admitted as a lawyer. The application fee has remained unchanged at $50 since September 2004. In addition, the application fee is waived if the license is obtained for the sole purpose of participating in a law school clinic program providing free legal services to low-income clients.

The actual cost of processing a Rule 9 legal intern application is considerably more than $50. Although application fees from other application types offset those costs, it is no longer feasible to maintain the license fee at $50 given the rise in labor costs, inflation, and expenses over the last 20 years. As such, we recommend increasing the Rule 9 application fee to $100 for 2027 with subsequent $25 annual increases until the fee reaches $200.

WSBA staff also surveyed other jurisdictions. While only a few responses were received, most indicated fees of $50 or less for intern or law student applications or licenses. Direct comparison, however, is challenging because each state has its own requirements, processes, and scope for intern and law student licensing. Qualifications, duration, and responsibilities vary, making fee structures unique to each jurisdiction. Unlike Washington, it appears that these jurisdictions generally do not conduct thorough character and fitness reviews. In addition, the Washington license also provides greater independence and lasts longer than those in most other jurisdictions.

Additionally, we propose discontinuing the fee waiver for law students in law school clinics providing free legal services to low-income clients, as it is inequitable to charge other applicants serving similar populations. Admissions operates as a self-sufficient cost center and should set fees that cover the costs of reviewing applications, but the proposed $100 fee falls short of the estimated review cost of $400 per application. So, even with the fee increase, substantial subsidies remain as the proposed increases remain well below the actual processing cost.

On May 27, 2026, WSBA staff met with representatives from Washington's three law schools to review the proposals and gather input. The law schools raised no significant concerns and generally agreed that the proposals were reasonable.

**New Admissions Pathway: Admission by Portfolio Evaluation**
The Washington Supreme Court (Court) currently is considering suggested amendments to the APR to implement a new pathway for admission, to be known as admission by portfolio evaluation. The portfolio evaluation will include a character and fitness application identical to the bar exam application with the same review process. Applicants will submit portfolio items such as written work product and supervisor assessments. Portfolio items will be evaluated by the Board of Bar Examiners.[1]

New costs and expenses associated with portfolio evaluation primarily revolve around additional duties assigned to staff and to the Board of Bar Examiners. Staff will monitor compliance with program requirements and coordinate and support examiners as they evaluate and grade individual portfolio items and receive a stipend similar to what is paid for grading the bar exam answers. Examiners will also be taking on a new task which is to develop ethics prompts for participants who choose not to use the Multistate Professional Responsibility Exam (MPRE). Portfolio grading sessions are expected to take place quarterly with 12-15 graders per session.

[1] For additional information about admission by portfolio evaluation, please visit www.wsba.org/portfolio-eval.

Philosophically, we recommend the application fee for admission by portfolio evaluation should be comparable to if not the same as the application fee for the bar exam. Both provide a way to demonstrate minimum competence to practice law. Both involve substantial staff time to be devoted to tracking an applicant's progress and significant expense associated with grading. In addition to the WSBA application fee, bar exam applicants pay an NCBE exam fee collected by the WSBA. Accordingly, we recommend the application fee for portfolio evaluation be the same as the total amount the WSBA collects from a bar exam applicant. The table below represents the proposed portfolio evaluation application fees compared to the bar exam application fees with the proposed increase to the attorney bar exam applicant.

| Application Fee Type | Current WSBA Application Fee | Proposed WSBA Application Fee | NCBE Exam Fee | Total Collected by WSBA |
|---|---|---|---|---|
| Bar Exam – General | $595 | Unchanged | $145 | $740 |
| Portfolio Evaluation – General | -- | **$740** | -- | $740 |
| Bar Exam - Attorney | $645 | **$970** | $145 | $1,115 |
| Portfolio Evaluation – Attorney | -- | **$1,115** | -- | $1,115 |

Other Jurisdictions

Oregon has an experiential pathway for admission called the Supervised Practice Portfolio Examination. Oregon's portfolio examination is substantially similar to Washington's proposed portfolio evaluation. Oregon has the same application fee of $1,000 for both bar exam applicants and its portfolio examination.

**Conclusion**

A three-year projection shows us that the proposal would result in a net income of approximately $193,000. A three-year projection and reassessment after that time allows us to identify and consider any new trends with the NextGen UBE, testing-accommodations, and the portfolio evaluation. Already we are encountering large increases in the number of applicants seeking testing accommodations. The expenses associated with testing accommodations are considerable and continue to increase. In addition, we have yet to know exactly how many graders will be needed for grading the NextGen UBE and how long grading will take. We also do not yet know exactly how many graders will be needed for grading the portfolio items or how frequently they will need to meet to grade. Finally, we will learn how many people choose the portfolio evaluation over the bar exam.

The following table lists, as a reference, all the admissions application fees including the proposed fee changes.

| Application Fee Type | Current WSBA Application Fee | Proposed WSBA Application Fee | NCBE Exam Fee | Total Collected by WSBA |
|---|---|---|---|---|
| UBE Score Transfer – General | $595 | Unchanged | -- | $595 |
| Bar Exam – General | $595 | Unchanged | $145 | $740 |
| Portfolio Evaluation – General | -- | **$740** | -- | $740 |
| Bar Exam - Attorney | $645 | **$970** | $145 | $1,115 |
| Portfolio Evaluation – Attorney | -- | **$1,115** | -- | $1,115 |
| UBE Score Transfer – Attorney | $645 | **$970** | -- | $970 |
| Admission by Motion – Attorney | $970 | Unchanged | -- | $970 |
| House Counsel | $970 | Unchanged | -- | $970 |
| Foreign Law Consultant | $970 | Unchanged | -- | $970 |

| | | | | |
|---|---|---|---|---|
| Rule 9 Licensed Legal Interns | $50 | **$100** | -- | $100 |

Information for Fiscal Analysis

If the application fees are increased and established as proposed in this memo, then the Admissions cost center is expected to be able to be self-sustaining for approximately the next five years with a projected net income of approximately $193,000 over the first three-year period.

Information for Equity Analysis

Ensures all attorney applicants are paying the same fee; which also further enables keeping fees lower for people entering the profession for the first time. Removing a waiver for one group ensures an equitable fee structure for all rule 9 applicants.

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

The risk analysis is in the BOG's 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 of the proposal is described in this memo and reflected in the attached three-year projection model.

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

The proposed changes to admission application fees pose minimal equity concerns. Based on the provided materials, the amount of fee increases appear to be scaled to actual financial costs and promote consistency and fairness in the admission fees charged, while also not imposing undue financial burdens on those seeking admission to the bar.

**Attachments**

- Three-Year Projection Model

# ADMISSIONS

| | FY 2027 | FY 2028 | FY 2029 |
|---|---|---|---|
| **REVENUE** | | | |
| BAR EXAM FEES | $1,554,500 | $1,626,020 | $1,626,020 |
| BAR EXAM LATE FEES | $65,000 | $65,000 | $65,000 |
| HOUSE COUNSEL APPLICATION FEES | $45,000 | $45,000 | $45,000 |
| FOREIGN LAW CONSULTANT FEES | $1,940 | $1,940 | $1,940 |
| SPECIAL ADMISSIONS | $5,000 | $5,000 | $5,000 |
| ALTERNATIVE PATHWAYS APPLICATION FEES | $148,000 | $111,000 | $111,000 |
| RULE 9/LEGAL INTERN FEES | $36,300 | $36,300 | $55,950 |
| **TOTAL REVENUE** | **$1,855,740** | **$1,890,260** | **$1,909,910** |
| **EXPENSES** | | | |
| STAFF TRAVEL/PARKING | $25,000 | $25,750 | $25,750 |
| STAFF CONFERENCE & TRAINING | $11,000 | $11,330 | $11,330 |
| STAFF MEMBERSHIP DUES | $495 | $510 | $510 |
| SUPPLIES | $2,500 | $2,575 | $2,575 |
| FACILITY, PARKING FOOD | $155,000 | $165,850 | $177,460 |
| POSTAGE | $3,700 | $3,811 | $3,811 |
| BAR EXAM PROCTORS | $14,400 | $14,688 | $14,982 |
| DISABILITY ACCOMMODATIONS | $90,000 | $92,700 | $95,481 |
| CHARACTER & FITNESS INVESTIGATIONS | $1,500 | $1,600 | $1,600 |
| BOARD OF BAR EXAMINERS | $50,000 | $63,948 | $65,788 |
| EXAMINER FEES | $68,000 | $91,000 | $91,000 |
| UBE EXAMINATIONS | $1,000 | $1,000 | $1,000 |
| EXAM GRADING (EXAM 360) | $20,000 | $25,000 | $5,000 |
| OUTREACH EXPENSES | $10,000 | $4,800 | $4,800 |
| LAW SCHOOL VISITS | $1,500 | $1,500 | $1,500 |
| SOFTWARE HOSTING (ILG) | $56,643 | $58,909 | $61,265 |
| **TOTAL DIRECT COSTS** | **$510,738** | **$564,971** | **$563,851** |
| SALARY AND BENEFITS | $924,212 | $1,011,742 | $1,074,371 |
| OVERHEAD | $259,836 | $270,918 | $281,755 |
| **TOTAL INDIRECT COSTS** | **$1,184,048** | **$1,282,661** | **$1,356,126** |
| **TOTAL DIRECT + INDIRECT COSTS** | **$1,694,786** | **$1,847,631** | **$1,919,977** |
| **INCOME/(LOSS)** | **$ 160,954** | **$ 42,629** | **$ (10,067)** |
| Cumulative Income/(Loss) Y2-Y6 | $ 160,954 | $ 203,583 | $ 193,516 |
| **FTEs** | **7.84** | **7.86** | **7.86** |

WASHINGTON STATE
BAR ASSOCIATION

**TO:** Board of Governors

**FROM:** Terra Nevitt, Executive Director

Paris Eriksen, Manager of Volunteer Engagement

**DATE:** June 15, 2026

**RE:** WSBA Treasurer Nomination & Voting Process

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**ACTION**: Elect a current member of the WSBA Board of Governors to serve as the 2026-2027 Treasurer, for a one-year term starting at the conclusion of the Board meeting on September 24-25, 2026.

**Nomination Process**:

Current members of the Board of Governors have two options to indicate interest in being nominated for Treasurer, 1) submit a cover letter and resume in advance of the July meeting or 2) be nominated from the floor of the July meeting (self-nomination is permitted). To date, one Board member has submitted materials for consideration. These materials follow this memo. After all nominees have been identified, the Board will have the opportunity to interview the candidates and deliberate.

**Voting Process**:

If there is only one candidate, the Board members will vote to formally elect the candidate as the 2026-2027 Treasurer. If there is more than one candidate, board members will be asked to indicate their choice through secret, electronic ballot. Proxy voting is not permitted. The Treasurer will be elected by a simple majority of Governors voting. If no candidate receives a majority of the votes cast, the two candidates receiving the highest number of voters will be voted on in a run-off election. Votes will be tallied by three persons designated by the President, one of whom must be the Executive Director.

**Relevant WSBA Bylaw**:

*D. ELECTIONS BY BOARD OF GOVERNORS*

*2. Treasurer*

*The Treasurer must be a current lawyer Governor and will be nominated and elected by the BOG at the second to the last regularly scheduled BOG meeting of the fiscal year. The Treasurer will be elected by simple majority of Governors voting. In the event there is more than one more nomination, the vote will be by secret written ballot.*

**Attachment:**
Governor Alain Villeneuve, application materials

**Alain Villeneuve**

[redacted] Seattle, WA 98101 | 312.404.1569 | [redacted]
www.linkedin.com/in/alain-villeneuve-62ab10

**Letter of Interest: Treasurer 2026-2027**

Dear Governors, President Elect, President, and Past President:

I am happy to offer my name, once again this year, as a nominee to Treasurer of WSBA for 2026-2027. I am the current Governor of District 7S, a member of the Budget and Audit Committee, and a volunteer of the investment subgroup. I am also helping the Director in Finance with a draft new policy as to the payment of stipends to some third parties for possible presentation to the BOG.

As the current director of foreign subsidiaries in my corporate role, a Senior Vice-President, a scientist by trade, I already approve financial and tax-related filings. While not a CPA myself, I greatly value this set of unique skill.

I strongly believe Ms. Tiffany Lynch, CPA and Director of Finance, working in tandem with past presidents, directors, and treasurers has placed our association in a very comfortable and transparent position. I do believe good fiscal policy is one of continuation, transparency and continuation. If re-elected as governor of my district, I plan to seek this role again in the coming years to bring continuation.

Policy 311 of our Board of Governor describe the Treasurer's primary function as "… to inform the Board and officers about the finances of the Bar." One of the key initiatives is for the review and possible presentation to the BOG of several investment strategies within our policy. These can range from highly-conservative (current), conservative, to prudent. My calculation suggests that a 1% policy change would represent a saving of approximates $2-$3 per member per year.

Sincerely,
Alain Villeneuve

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Darryl Colman, MCLE Board Chair
Adelaine Shay, MCLE Board Staff Liaison and WSBA MCLE Manager

**DATE:** June, 11, 2026

**RE:** MCLE Board's Preliminary Suggested Amendment to Admission and Practice Rule (APR) 11: High School and Undergraduate Mock Trials

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**Action**: The MCLE Board asks that the WSBA Board of Governors support its preliminary suggested amendment to Admission and Practice Rule (APR) 11 regarding the establishment of MCLE credit for attorney volunteers who judge or otherwise evaluate students participating in MCLE Board approved high school or undergraduate mock trials.

## MCLE BOARD ROLE & RESPONSIBILITIES

Pursuant to APR 11(d)(2)(i), "The MCLE Board shall review and suggest amendments or make regulations to APR 11 as necessary to fulfill the purpose of MCLE and for the timely and efficient administration of these rules and for clarification of education requirements, approved activities, and approved course subjects. Suggested amendments are subject to review by the Board of Governors and approval by the Supreme Court."

## SUMMARY

The MCLE Board is proposing a suggested amendment to APR 11 to allow licensed legal professionals to earn MCLE credit for time spent judging or otherwise evaluating students participating in MCLE Board approved high school or undergraduate mock trial events.

## BACKGROUND

This initiative arose from the August 9, 2024 meeting, where the YMCA presented the benefits of granting MCLE credit to those involved in high school mock trials. The presentation provided an overview of the specific YMCA mock trial program, which is designed for secondary students, centered around a fictitious case crafted by a Washington Superior Court Judge, and consists of three-hour trials presided over by sitting judges. In addition to the direct judging role, the program also includes attorney raters who provide additional feedback and evaluation.

YMCA's proposal prompted the MCLE Board to convene a subcommittee to study whether mock trial judges at the high school and undergraduate level should receive credit. The subcommittee's work resulted in drafting a suggested amendment which would establish credit for high-school and undergraduate mock trial volunteers. At its October 17, 2025 meeting, the MCLE Board indicated that it was interested in moving forward with the amendment

process and characterized the amendment as a goal for the 2025-2026 fiscal year. At the January 2026 meeting the MCLE Board decided to finalize a report and seek public comment on the potential amendment.

## FACTORS IN SUPPORT OF THE SUGGESTED AMENDMENT

### Professional Development

Participating in a mock trial program contributes to a licensed legal professional development by providing a way to engage with the Rules of Evidence and courtroom procedure, opportunities that are increasingly rare, especially for newer attorneys, due to the declining number of trials in Washington courts.[1] The program also contributes to professional development by connecting attorneys directly with judges and offering attorneys the opportunity to consider advocacy from the perspective of a judge.

### Equity Goals

Offering this MCLE credit benefit promotes diversity of the legal profession through mock trial programs by assisting students who may have an interest in legal careers. Students without family or social ties to the legal profession can, through high school and college-level mock trial programs, learn about the legal profession, see themselves as potential future lawyers and jurists, and gain connections that may help them pursue a legal career. Offering MCLE credit for this supervision and instruction time may encourage lawyers to serve as volunteers for these important programs, thereby furthering WSBA's commitment to increasing access to justice.

### Civic Engagement Around the Rule of Law

For students, mock trials facilitate transparency and engagement with the law, create opportunities for education, and allows for youth to see themselves in the role of lawyer. This experience could lend itself to a better understanding of and trust in the rule of law. Providing MCLE credit dovetails with the WSBA Ambassadors Program [2]mission as well the professional responsibilities as quoted (on the Ambassador Program's webpage) and below:

> "[A] lawyer should further the public's understanding of and confidence in the rule of law and the justice system because legal institutions in a constitutional democracy depend on popular participation and support to maintain their authority."
> —RPC Preamble: A Lawyer's Responsibilities[3]
>
> "In general, the Washington State Bar Association strives to … administer programs of legal education … and promote understanding of and respect for our legal system and the law."
> —General Rule 12.2[4]

### National Landscape

[1] *See generally* https://www.courts.wa.gov/caseload/?fa=caseload.showArchived
[2] https://www.wsba.org/about-wsba/ambassadors
[3] https://www.courts.wa.gov/court_rules/pdf/RPC/GA_RPC_PREAMBLEANDSCOPE.pdf
[4] https://www.courts.wa.gov/court_rules/pdf/GR/GA_GR_12_02_00.pdf

Washington would be joining at least 11 states currently awarding MCLE credit for judging, evaluating, or scoring high school mock trials, including, Oregon, Colorado, Nevada, Texas, Kentucky, Georgia, New York, Vermont, Rhode Island, New Jersey, and Delaware.

**Feedback**

Information regarding the potentially suggested amendment is located on the MCLE Board webpage[5], and additionally on March 18, 2026 and April 1, 2026 the "Take Note" WSBA email was sent which contained a paragraph soliciting feedback from WSBA members.

At its April 17, 2026 meeting, the MCLE Board invited in-person public comment on the proposed amendment, and no comments were made. As of May 1, 2026, thirty-nine responses were collected via the online survey. Out of those responses, thirty-seven are in favor of the suggested amendment, and the remaining two are partially in favor. All received comments are included in the attached materials.

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

The risk analysis is included in the BOG"s 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 criteria is limited in size but covers areas of both revenue and expense. Under the current proposal, licensed legal professionals would be able to earn CLE credit for their time spent judging or otherwise evaluating approved mock trials. It is assumed that without this opportunity, these individuals would be earning CLE credit in another capacity, which could include paying for a WSBA provided CLE. Therefore, there is a very small possibility of an impact on WSBA CLE revenue. In terms of expenses, the impact includes the cost of staff time used to draft the amendment language, incorporate the amendment into relevant records, and communicate changes to stakeholders. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and does 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 purpose of the equity analyses is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all. Based on the materials provided, the suggested amendments to APR 11

[5] https://www.wsba.org/Legal-Community/Committees-Boards-and-Other-Groups/mcle-board

do not pose any significant equity concerns. The proposed changes advances procedural equity by allowing MCLE credits for attorney volunteers who judge or evaluate high school or undergraduate mock trials as APR 11 already allows MCLE credits for attorneys should judge or evaluate law school level mock trials. It also seeks to advance equity as an outcome by diversifying the profession and reducing disparities.

Attachments

- MCLE Board Report and Recommendation
- APR 11 Preliminary Suggested Amendment—Redline
- Public Comments—Collected Feedback from Survey

**From:** Mandatory Continuing Legal Education Board
**To:** Washington State Licensed Legal Professionals & Community Members
**Date:** January 9, 2026
**RE:** **REPORT AND RECOMMENDATION OF THE MCLE BOARD**

**Mandatory Continuing Legal Education Board**

The Mandatory Continuing Legal Education Board ("MCLE Board") consists of seven members: Darryl Colman (Chair), Katharine Denmark, Nicole Meyer, Efrem Krisher, Henry Phillips, Brendon Taga, and Justin Durueke.

**Suggested Amendment**

The MCLE Board recommends an amendment to Admission and Practice Rule (APR) 11 that would allow for licensed legal professionals evaluating MCLE Board-approved high school and undergraduate competitions to earn MCLE credit.

The MCLE Board recommends the following suggested amendment to APR 11:

APR11 (d) MCLE Board (2) *Powers and Duties* (vii) Approve Mentoring Programs and High School/College-Level Mock Trial Programs. The MCLE Board shall approve mentoring programs and high school and college-level mock trial programs that meet requirements and standards established by the MCLE Board for the purposes of awarding MCLE credit under these rules.

APR11(e)(11) Judging, evaluating, or scoring participants in a high school or college-level mock trial or moot court program approved by the MCLE Board.

**Factors & Information**

Professional Development

Participating in the mock trial program contributes to professional development by providing a way to engage with the Rules of Evidence and courtroom procedure, opportunities that are increasingly rare, especially for newer attorneys, due to the declining number of trials in Washington courts.[1] The program also contributes to professional development by connecting attorneys directly with judges and offering attorneys the opportunity to consider advocacy from the perspective of a judge.

[1] *See generally* https://www.courts.wa.gov/caseload/?fa=caseload.showArchived

Equity Goals

Offering this MCLE credit benefit promotes diversity of the legal profession through mock trial programs by assisting students who may have an interest in legal careers. Students without family or social ties to the legal profession can, through high school and college-level mock trial programs, learn about the legal profession, see themselves as potential future lawyers and jurists, and gain connections that may help them pursue a legal career. Offering MCLE credit for this supervision and instruction time may encourage lawyers to serve as volunteers for these important programs, thereby furthering WSBA's commitment to increasing access to justice.

Civic Engagement Around the Rule of Law

For students, mock trials facilitate transparency and engagement with the law, create opportunities for education, and allows for youth to see themselves in the role of lawyer. This experience could lend itself to a better understanding of and trust in the rule of law. Providing MCLE credit dovetails with the WSBA Ambassadors Program mission as well the professional responsibilities as quoted (on the Ambassador Program's webpage) and below:

> "[A] lawyer should further the public's understanding of and confidence in the rule of law and the justice system because legal institutions in a constitutional democracy depend on popular participation and support to maintain their authority."
> —RPC Preamble: A Lawyer's Responsibilities

> "In general, the Washington State Bar Association strives to … administer programs of legal education … and promote understanding of and respect for our legal system and the law."
> —General Rule 12.2

National Landscape

Washington would be joining at least 11 states currently awarding MCLE credit for judging, evaluating, or scoring high school mock trials, including, Oregon, Colorado, Nevada, Texas, Kentucky, Georgia, New York, Vermont, Rhode Island, New Jersey, and Delaware.

**Attachments**

1. Admission and Practice Rule (APR) 11
2. Draft APR 11 Redline
3. 2025 YMCA Mock Trial Impact Report

**SUGGESTED AMENDMENTS TO THE APR 11 (Redline)**

**TITLE**

ADMISSION AND PRACTICE RULES (APR)

**RULE 11. MANDATORY CONTINUING LEGAL EDUCATION (MCLE)**

**(a) – (d)(1) No Changes.**

**(2)** *Powers and Duties* (vii) Approve Mentoring Programs and High School/College-Level Mock Trial Programs. The MCLE Board shall approve mentoring programs, and high school and college-level mock trial programs that meet requirements and standards established by the MCLE Board for the purposes of awarding MCLE credit under these rules.

**(d)(3)– (e)(10) No Changes.**

APR11(e)(11) Judging, evaluating, or scoring participants in a high school or college-level mock trial or moot court program approved by the MCLE Board.

**(f)(1)-(k) No changes.**



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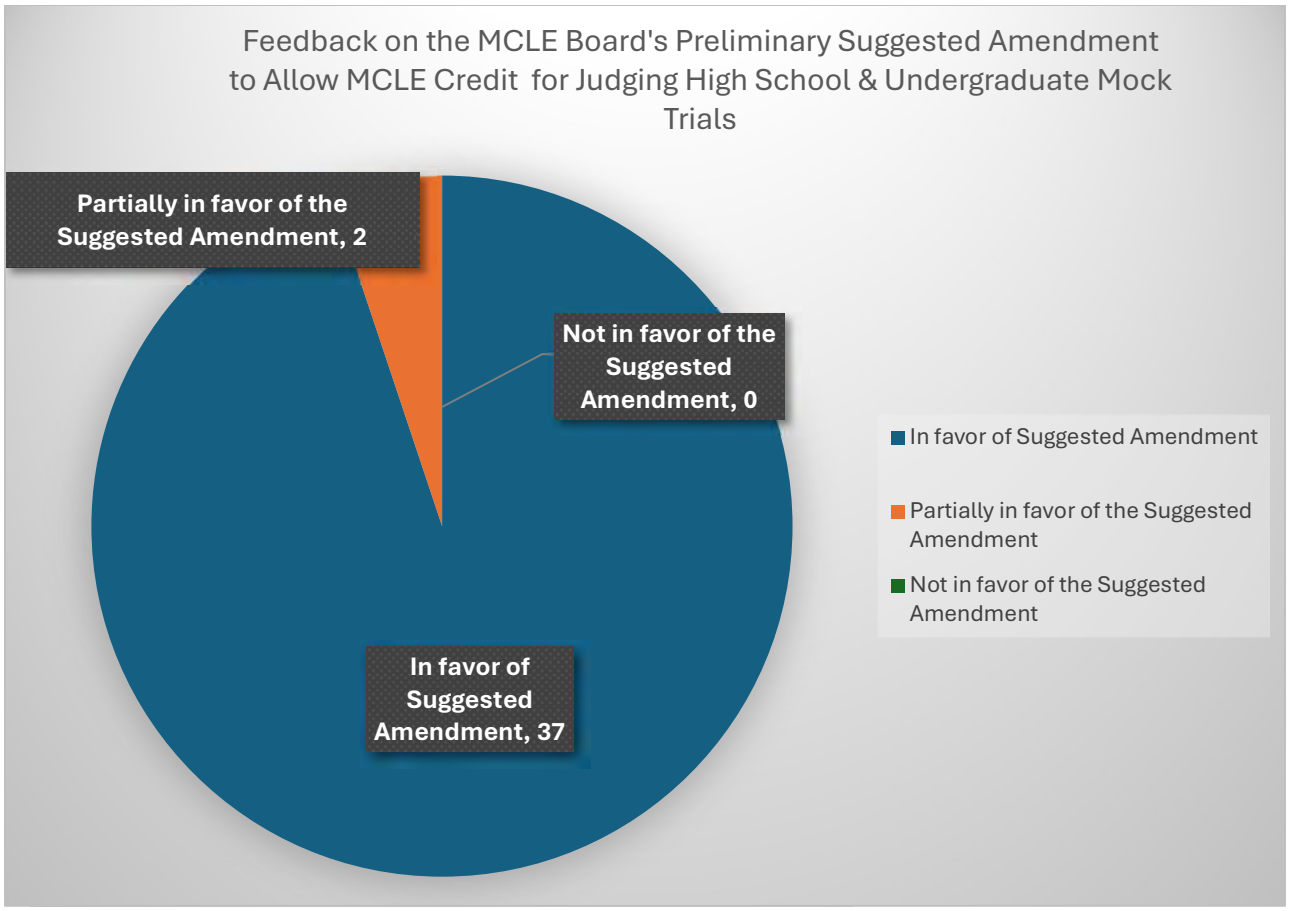
Feedback on the MCLE Board's Preliminary Suggested Amendment to Allow MCLE Credit for Judging High School & Undergraduate Mock Trials
Partially in favor of the Suggested Amendment, 2
Not in favor of the Suggested Amendment, 0
In favor of Suggested Amendment, 37
In favor of Suggested Amendment
Partially in favor of the Suggested Amendment
Not in favor of the Suggested Amendment

**Feedback Received as of May 1, 2026**

Regarding MCLE Board's Preliminary Suggested Amendment - Judging High School and Undergraduate Mock Trials

| Id | Completion Date | Your Name | Your relationship to WSBA | Position on the MCLE Board's Suggested Amendment to APR 11 | Please provide any feedback or comments you have regarding the Suggested Amendment: |
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| 1 | 3/18/2026 | Jamie Olivares | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | |
| 2 | 3/18/2026 | Jennifer Flynn | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I am strongly in favor of this amendment. I am a lawyer today entirely because of the existence of the YMCA Mock Trial program that was offered in my high school. I am the first person in my family to go to college, let alone law school, and I never would have considered this career path without the experience of participating in high school mock trial. I have been involved in mock trial at some level for the past 22 years - I continued to participate in college and law school, coached a team for six years after becoming a lawyer, and I continue to mentor and judge high school & college competitions.<br><br>When I took Evidence in law school, I found that I was lightyears ahead of many of my peers because I already had 10 years of experience working with the rules of evidence. Coaching and judging competitions lets me continue to practice rules that might not come up regularly in my practice, and it keeps me excited about what I do. I love having the opportunity to work with young people and help recruit the next generation of lawyers from diverse backgrounds. Many of them would otherwise not know their rights, the pathways to a career, or their own potential. Many of the students we see at the high school level are every bit as talented as some of the students we see at law school level competitions. Due to the larger number of students participating, we need more qualified judges for these competitions and it is hard to get people involved without the incentive of CLE credits.<br><br>I cannot say enough positive things about the YMCA high school mock trial program. I would be happy to share my experience as a former participant, a coach, and a rater if it would be helpful in any way to the committee in making a decision. I can be contacted at [redacted for privacy]. |

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| 3 | 3/18/2026 | Kelsey L. Affronte | Licensed legal professional (Lawyer, LLLT, LPO) | Partially in favor of the Suggested Amendment | I think it confirms what attorneys already know, since you're providing feedback to people who have never been to law school/taken the bar. I do like the exposure to different practice styles and feedback from those who have a different perspective on practice, which I think is valuable as a CLE. Maybe there should be a limit on how many of these credits you can claim as MCLE credits? I do like this amendment, but I think these types of volunteer activities have their limits as far as MCLE credits, versus pro bono hours. I also know that these volunteer activities have been hurting for volunteers for many years, so this would be a good way to encourage giving back to your community. Again, maybe that is better as a pro bono credit after a certain number of MCLE hours... |
| 4 | 3/18/2026 | Eli Creighton | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | |
| 5 | 3/18/2026 | David Trujillo | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | |
| 6 | 3/19/2026 | Fawzy T. Simon | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | #1. It causes lawyer to think analytically about a problem.<br>#2. It builds community relations and shows that, even though almost no one consults an attorney when they’re having a GOOD day, still, we care about our communities. |
| 7 | 3/19/2026 | Alyssa Lindburg | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | |
| 8 | 3/24/2026 | Shaunita Felder | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | It takes all of your day to sit and judge those competitions and you have to fill out a rating form, look at materials beforehand, give feedback after to the group and then get stopped for questions and comments in the hall on your way out. These should have been eligible for CLE credit, especially when the YMCA and the judges in charge have our names and information to report. |

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| 9 | 3/25/2026 | Ben Stafford | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I am a member of the bar, and for 20 years have coached high school mock trial. I have also judged many law school competitions, for which I've received CLE credit. I would strongly support extend of CLE credit to judging undergraduate and high school mock trials. To be sure, this would facilitate the bar providing an invaluable civic service by encouraging volunteerism. As a former high school mock trial student, participation in the mock trial program is what led to me becoming a lawyer myself. The program is not possible without the scores of lawyers who volunteer their time. But in addition to its salutary benefits in that regard, there is simply no meaningful distinction, in my experience, between judging law school or other mock trial competitions in Washington. When I attended law school, I found evidence to be a breeze because of my high school mock trial experience -- I knew all the rules. And students in high school and college (I've judged a number of competitions) display that knowledge of evidence and trial procedure through mock trials. Lawyer raters, just as with regard to law school competitions, have an opportunity to share trial advocacy feedback at the end of these competitions and, frankly, speaking from personal experience, benefit from hearing a multiplicity of perspectives on what kind of trial presentation is most compelling.<br><br>I cannot recommend supporting this amendment strongly enough! |
| 10 | 3/25/2026 | Terence Lynch | Licensed legal professional (Lawyer, LLLT, LPO) | Partially in favor of the Suggested Amendment | Completely agree that judging and eating high school Mock Trial should earn lawyer participants CLE credit.<br><br>I checked “partially agree” because the amendment does not include CLE credits for the several dozen lawyers who volunteer to coach high school teams.<br><br>These lawyers are competently teaching high schoolers the fundamentals of evidence and basic-to-intermediate trial skills, same as the lawyers who volunteer to teach new bar admittees the same material in trial skills CLEs that are already being given credit.<br><br>I would amend the rule to permit lawyers to also claim some hours for coaching too. |

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| 11 | 3/25/2026 | William L. Downing | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | Before retiring in 2017, I chaired the statewide YMCA Mock Trial Program for a number of years and conducted the King County competition for more than 25 years. The attorney raters invariably reported that they learned a lot from observing the way in which the student lawyers argued the law and the facts. Part of this was in thinking like a judge, hearing the legal analysis on the fly (not laboriously briefed) and part of it was seeing things as a juror might (the emotional as well as the logical.) The insights gained on both levels are extremely valuable for the practitioner. The time is well spent and should be rewarded. |
| 12 | 3/25/2026 | Eric L. Hanson | Mock Trial Coach | In favor of the Suggested Amendment | It is such a blessing to have legal professionals giving back to their communities. These wonderful professionals give hours of their time to judge or rate competitions. Still others volunteer to coach. I know that this amendment is specific to the former though, so I will comment on that only. I do believe that the time our professional volunteers give is important - the impact they have on communities and the lives of the 1000's of youth who participate is meaningful and a benefit to the public as they shape the next generation of legal professionals through their presence, and especially their feedback and shared expertise. Please adopt this motion to include participation in mock trials as an option to accumulated required MCLE hours. This is good policy, and it serves the professional and public good. Thank you. |
| 13 | 3/25/2026 | Patrick Lynch | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I have been involved in high school mock trial as a Coach and Judge since I was sworn in. Clients are continually more and more hesitant to try cases due to the costs involved with trial. Mock Trial, even at the high school level, provides invaluable experience to attorneys that is translatable to their real world practices. I would recommend that this rule be adopted, but I would also recommend that CLE credit be given for the Coaches as well. |
| 14 | 3/25/2026 | Michael Kelly | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I strongly encourage the MCLE Board to adopt this Suggested Amendment. I am a volunteer Coach for Ballard High School's Mock Trial team. While I would not receive the direct benefit of this Suggested Amendment (MCLE credits), I see first-hand how valuable and scarce our judges and raters are. At times we struggle to put on a full tournament due to the lack of a sufficient number of judges and raters. I strongly support this as an additional means of encouraging quality attorneys and judges to give their time to support Mock Trial. |
| 15 | 3/25/2026 | Benjamin Gould | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I have been involved in coaching the Ingraham High School mock trial team and found it to be an invaluable educational experience not just for the students but for myself. To be able to effectively teach procedural, evidentiary, and substantive rules of law, one must master them completely and understand them from the inside out. Reviewing and then having to teach (for example) the hearsay rule and its exceptions, or the rules about character evidence under ER 404, improved my own trial practice. In some ways, my experience coaching the IHS mock trial team has been the single most valuable continuing legal education I have ever benefited from; it is well past time that it be recognized as such. |

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| 16 | 3/25/2026 | Trisha Johnson, Senior Deputy Prosecuting Attorney, Skagit County | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I would encourage the Board to adopt the proposed amendment. I am a volunteer in both Washington's YMCA High School Mock Trial program and the ABA Mock Trial college program and am called on to assist in judging due to shortages of available attorneys to assist. The adoption would be helpful to assist in the recruitment of judges for competition, as well as allowing the current attorneys that volunteer to spend their evening and weekend judging to receive credit. We have discovered that once attorneys become involved in judging these young people that are interested in the law and see how amazing their work is, they return to volunteer, assist and even mentor youth in these programs. I agree these programs are an excellent way to engage youth in the legal field and give them exposure they would otherwise they would not have access to. |
| 17 | 3/25/2026 | Erin Riley | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I am a member of the bar of Washington since 2000, litigate civil cases, and have been a volunteer coach for the Ingraham High School mock trial team for the past two years. I have found coaching mock trial a valuable educational experience not just for the students but for myself. To be able to effectively teach pretrial motions, opening and closings, direct and cross examinations, not to mention effective objections and responses, one must master them completely and understand them from the inside out. Thank you. |
| 18 | 3/25/2026 | Susan Fisch | Law Student | In favor of the Suggested Amendment | I support this amendment for all of the reasons listed in the written position. Students participate in Mock Trial to learn about the law and the legal profession. They gain invaluable skills that they can use in all aspects of life regardless of whether they pursue a career in the law. Students gain confidence when members of the bench and bar invest time in them. It helps not only the students that participate but their friends, family and the entire community as well. This experience allows our students to realize that college and a career in the law are attainable. Encouraging attorneys to participate in this process by awarding MCLE credit is a win/win proposition. |
| 19 | 3/25/2026 | Joshua Poisel | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | This amendment makes practical sense. It recognizes the real educational value of mentoring students through mock trial programs. When attorneys invest time in guiding students and evaluating their performance, they're helping build the next generation of legal professionals while reinforcing their own skills. CLE credit for this work will encourage more participation in mock trial programs, mentorship, and shaping future legal professionals. It is also meaningful way and path to connect professional development with community impact. |
| 20 | 3/26/2026 | Megan Dunn | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | Each year it is difficult to recruit licensed attorneys to participate as raters and judges for mock trial competitions. Approving CLE credit for these participants would provide a helpful incentive. The students love hearing from practicing attorneys, so the more this could be encouraged, the better. |

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| 21 | 3/26/2026 | Julie Thrall Burrow | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I volunteer a significant number of hours at the local high school's mock trial program. It keeps my rules of evidence knowledge up to date and my argumentative skills honed. And it's super helpful to the program to have licensed attorneys helping out. I'd really appreciate being able to get CLE credit for this. Thanks for considering it. |
| 22 | 3/27/2026 | Laura Gerber | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I am a lawyer in Seattle in private practice.<br><br>In law school I was on the Moot Court Honor Board and participated in moot court competitions. One of my responsibilities was to recruit local practitioners to serve as judges or raters for our competitions. I recall how difficult it was to find individuals willing to serve as judges for our competitions. I also the incredible benefit these individuals provided when they offered candid, informed feedback to me. I was able to use this feedback to improve my performance and consider new ways to prepare for competitions. In my view, offering CLE credit would be helpful to the extent it would encourage more attorneys to volunteer time to serve as judges or raters for these competitions.<br><br>For the last two seasons, I have been a coach for the Ingraham High School Mock Trial program. Having recently completed another Mock Trial season, I have witnessed the incredible benefit that in-depth and considered feedback from judges and raters has provided to our students. Our students' skills, their case strategies, and their thinking about their roles as attorneys and witnesses were enhanced when they received informed, candid feedback from judges and raters. Because having dedicated and knowledgeable individuals serving as judges and raters is hugely beneficial to the development of the YMCA Mock Trial program, I support making CLE credit available to these individuals through this amendment. |
| 23 | 3/27/2026 | Hugh Barber | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | Hello- I was KC prosecutor for 27 years and am now in private practice. Throughout my career I have gladly committed to the advancement of our profession through teaching Trial Ad, speaking on panels and judging mock trials presented by law schools, local high schools/colleges and the YMCA. Preparing to judge those mock trials takes a tremendous amount of time and effort, and many qualified attorneys shy away from participating in the non-law school mock trials because we don't get CLE credits for it. Allowing judges and raters of non-law school mock trials to get CLE credits would broaden the pool of attorneys qualified to do so and ensure the participants get the feedback necessary for them to succeed not just in that particular event, but as future lawyers if they choose to become one. |

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| 24 | 3/27/2026 | C ANDREW MCCARTHY | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I believe that I may have inadvertently written an extensive comment in support of THIS Amendment in the MSForm for commenting on Colorado comity. I apologize for that mistake. Rather than retype what I wrote, I ask you to please consider my comments where they were intended -- in support of MCLE credit for mock trial judging/scoring/coaching. Thank you. |
| 25 | 3/27/2026 | C ANDREW MCCARTHY | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | My WSBA number is 21080 (inactive as of 2024 (?)). I am a longtime high school mock trial coach at Seattle Prep. I am writing to support this amendment enthusiastically. In close to 30 years of coaching, I have seen hundreds of high school mock trials. At the end of each round, the scorers and the presiding judge provide feedback on trial advocacy to the students. I learn something in every single round -- sometimes something about substantive law, sometimes a trial advocacy tip, sometimes a nuance of evidence law -- but always something. That is true of most of the lawyers in the room, I would venture to say. I also regularly judge at college mock trial competitions (AMTA) at the University of Washington, and at the Empire Mock Trial program (high school). The same is true of those competitions. In the September 2014 issue of the WSBA's NW Lawyer Magazine, I published the article "Teens Take on Attorneys: Mock Trials Have Real Benefits for All." That article sets out the many benefits that mock trial coaching has for practicing attorneys. Although this proposal comes too late to give me CLE credit for any of those many hours that I have spent on the activity, I am confident that credit for mock trial scoring at all levels will improve civics education in Washington State and make it easier to recruit volunteer scorers for competitions. I am unable to attend the meeting on April 17. However, given my experience with mock trial, I would be happy to be part of the process of finalizing some of the details if the amendment goes into effect. For example, should there be some hours allowed for coaching? Or only for scoring/judging? Should there be a cap on the total number of hours that can be earned via mock trial? These are all fair questions, and I would be happy to share my perspective if asked. |
| 26 | 3/30/2026 | Colleen Fitzharris | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I participated in mock trial throughout my high school career and benefitted tremendously from the thoughtful feedback of attorney volunteers. Now that I am a practicing attorney, I regularly return to the lessons I learned as a mock trial participant. I find that watching and providing feedback to my colleagues about their writing and presentation style cause me to reflect on my own practices. I believe that awarding CLE credits to attorneys who help students are not only positively contributing to the education of others but also learn from the experience. I strongly support this amendment and hope the change encourages other attorneys to volunteer their time for this tremendous program. |

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| 27 | 3/30/2026 | Geoffrey Burg | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | Dear Members of the WSBA Board and CLE Committee,<br><br>The YMCA mock trial competition just finished another successful year, made possible not only by the hard work of the YMCA but also by the leadership of Judge Padula and by thousands of volunteer attorney hours from coaches, raters, and judges. I am writing to propose that the Washington State Bar Association (WSBA) adopt a policy awarding Continuing Legal Education (CLE) credits to attorneys who volunteer as coaches, judges, or raters for high school mock trial competitions, not unlike what you already do for law school competitions. This initiative would serve as a powerful incentive for professional engagement while directly advancing our Bar's core mission. As many of us have experienced, the YMCA high school mock trial program is a transformative educational tool. Personally, I have taught mock trial high school students for 10 years and have seen this in action. However, its success depends entirely on the availability of legal professionals to provide mentorship and evaluation, and many schools struggle to find people to teach the students, while the judges are always working hard to find raters. By formalizing CLE credit for this service, the WSBA can achieve several goals:<br>1. Strengthening the Pipeline of Future Lawyers<br>To ensure our profession thrives, we need to actively recruit the next generation. Mock trial is often the first point of contact a student has with the legal system. When practitioners volunteer, they don't just teach "rules of evidence"; they demystify the profession and provide students from diverse backgrounds with a roadmap to a legal career.<br>2. Professional Development for Current Attorneys<br>Teaching is one of the most effective ways to master a subject. Attorneys who rate or coach mock trials must engage deeply with the Rules of Evidence, Civil/Criminal Procedure, and Trial Advocacy techniques. Distilling these complex concepts for students requires a level of mastery that directly benefits an attorney’s own practice.<br>3. Alignment with the WSBA Mission<br>The WSBA’s mission includes "serving the public" and "enhancing the culture of service." Providing CLE credits for mock trial participation:<br>Promotes public understanding of the law.<br>Increases access to justice by supporting programs in underserved schools that may lack legal resources.<br>Fosters civility and professionalism as attorneys model ethical behavior for the community.<br>4. Incentivizing Pro Bono Service<br>While many attorneys feel a moral obligation to volunteer, the time away from the office remains a hurdle. An allocation of CLE credits could provide the necessary "nudge" to convert interest into action.<br>Several other state bars (New York, California, New Jersey, Connecticut, Georgia, and Texas) have successfully implemented similar programs for their high school students, recognizing that the "educational" component of CLE can extend beyond a lecture hall and into the practical application and teaching of our craft.<br>I believe this change would be supported by the membership and yield dividends for the Washington legal community for years to come. I would welcome the opportunity to discuss how we might structure a pilot program for the upcoming mock trial season.<br><br>Geoffrey Burg |

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| 28 | 3/30/2026 | Lizanne Padula | Lawyer-Judge-WA YMCA MT Program Chair | In favor of the Suggested Amendment | I am strongly in favor of this suggested amendment. First, I hope we can all agree in the value of high school mock trial programs. These programs increase knowledge of our system of justice and promote critical thinking in general. In part, what makes the YMCA Mock Trial Program so valuable is the volunteer participation of Lawyers and Judges. Typically, this volunteer commitment is 3 hours per round of competition. Each volunteer likely spends another hour or two, reading the case and applicable caselaw. The scoring and feedback to the participants is more valuable because it comes from legal professionals giving real, practical and insightful feedback. From these interactions, I have witnessed the development of mentoring relationships and internships. I have seen the Lawyers and Judges, in the courthouse hallways, after the rounds of competition, conversing and inspiring these young minds to continue their pursuit of legal knowledge. As someone that is in charge of rounding up approximately 300 volunteers each year for YMCA Regional & State tournaments, I can attest that I am often asked if the legal volunteer can receive CLE or CJE credits for their participation. I believe that volunteer recruitment would be more effective if we could indicate that CLE/CJE credit is available. This suggested amendment will help ensure that Lawyers and Judges continue to be engaged in local education and community and, through that engagement, foster the next generation of Lawyers and Judges. Lastly, this suggested amendment is wholly consistent with other educational and community-oriented activities promoted by the WSBA and our Supreme Court. |
| 29 | 4/13/2026 | Mary Robnett | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | Participating in the mock trial program, including judging, evaluating, or scoring participants should be approved for CLE credit. It is such a valuable program and ALL participants benefit from the preparation and participation in the program. |
| 30 | 4/13/2026 | Cambria Judd Babbitt | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | As a lawyer who has participated in YMCA mock trial rating, I think CLE credit should be awarded. CLE credit is awarded for judges of law school mock trials and competitions, which serve the same purpose of educating students through practical experience in the area of law |
| 31 | 4/14/2026 | Peter Jones | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I have been judging or evaluating the state mock trial competition for a decade now. They say that by teaching, we learn, and this activity proves it. While it's a good thing for the community, it also helps me sharpen my trial practice skills in real time by being able to discuss issues of trial advocacy with the participating youth. I get more legal education out of this activity than I get from most lecture CLEs, and I wholeheartedly support this amendment. |

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| 32 | 4/16/2026 | n/a | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | This is a great step towards access to justice by ensuring attorneys have an active role engaging with our youth, the future lawyers in our community, and by allowing for credits, this opens the door to attorneys that otherwise don't have the privilege of volunteering with youth without anything in return (private attorneys often can use it as pro bono credit or are paid for the work). |
| 33 | 4/20/2026 | Lindsay Zerfas | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | These programs are significant opportunities to engage positively with the public and attract diversity to our profession, which is historically dominated by white men. The youth that participate are a joy to be around and attorneys can learn so much from their bright minds. It also takes a lot of focus and effort to act as a rater. Far more is required of raters at the tournaments than for typical CLEs.<br><br>Additionally, I run the only Middle School mock trial tournament in the state and assist with the High School mock trial program in Snohomish County. We regularly run into difficulties getting raters. Often, we rely on the same individuals to rate for multiple rounds. It would be spectacular to include CLE credit as this would help recruit raters. |
| 34 | 4/20/2026 | Brooks de Peyster | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | Giving attorneys the opportunity to earn CLE credits for judging undergrad mock trial will be a net positive for our profession and will inspire the next generation of WA lawyers to go to law school. |
| 35 | 5/1/2026 | Peter Heineccius | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I am strongly in favor of the Suggested Amendment for the reasons provided by the MCLE Board. I would further expand the activities listed in APR11(e)(11) to also include "preparing students" for these programs. Lawyers who volunteer their time to teach trial advocacy skills to high school and college students should be treated the same as those who prepare law school students under APR11(e)(9). Thank you. |
| 36 | 5/1/2026 | Muna Jaylaani | Member of the public | In favor of the Suggested Amendment | |
| 37 | 5/1/2026 | Pauline Freund | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | Supporting high school mock trial is a benefit to our whole profession. It’s also a lot of work and should be rewarded. |

**Feedback Received as of May 1, 2026**

Regarding MCLE Board's Preliminary Suggested Amendment - Judging High School and Undergraduate Mock Trials

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| 38 | 5/1/2026 | Tia Rasmussen | Teacher + Mock Trial Coach | In favor of the Suggested Amendment | Every legal professional who rates/judges local mock trial competitions remarks that the students are more competent and commanding than the attorneys they encounter in court every day. Competitions are academic, critical, rigorous, and inspiring. By incentivizing and recognizing participation, you are not only investing in future lawyers in our community, but also reminding legal professionals why they pursued this career in the first place. |
| 39 | 5/1/2026 | Alysa Mo | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | As a former undergraduate mock trial competitor, and current attorney and undergrad mock trial judge, I've seen first hand the value and importance of having judges with diverse tenure and demographics. By permitting MCLE credits to be granted for judging in these competitions, it will be more accessible for attorneys who have stricter billing and life schedules to judge, and the pre-law community will undoubtedly benefit. As an attorney, I've been extremely impressed with the level of knowledge and grasp of the rules of evidence that undergrad students have, and find that my own education of the rules of evidence are often more sharpened by judging undergrad competitions than law school competitions. |
| | | | | | |

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Darryl Colman, MCLE Board Chair

Adelaine Shay, MCLE Board Staff Liaison and WSBA MCLE Manager

**DATE:** June 11, 2026

**RE:** MCLE Board's Suggested Amendment to Admission and Practice Rule (APR) 11 – Comity with Colorado

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**Action**: The MCLE Board asks that the WSBA Board of Governors support its preliminary suggested amendment to Admission and Practice Rule (APR) 11 regarding the establishment of MCLE comity with Colorado.

## MCLE BOARD ROLE & RESPONSIBILITIES

Pursuant to APR 11(d)(2)(i), the MCLE Board is tasked with reviewing and proposing amendments or establishing regulations for APR 11 as needed to support the purpose of MCLE. This includes ensuring timely and efficient administration of APR 11 and providing clarity on education requirements, approved activities, and approved course subjects. All suggested amendments are subject to review by the Board of Governors and approval by the Supreme Court.

## SUMMARY

As established in APR 11(c)(6), the education requirements in Oregon, Idaho, and Utah substantially meet Washington's education requirements for lawyers. These states have been designated as comity states.

Lawyers licensed in any of the three comity states may satisfy APR 11 requirements by paying the comity fee and submitting a Comity Certificate of MCLE Compliance confirming they met that state's MCLE requirements for their most recent reporting period. The MCLE Board is currently considering a proposed amendment to APR 11(c)(6), which would expand comity to include Colorado.

## BACKGROUND

After receiving feedback at the 2024 annual meeting with the Court to explore expanding comity to other states, the MCLE Board began researching the MCLE requirements in other states. This research led them to consider recommending an amendment that would treat Colorado as a comity jurisdiction, since Colorado's MCLE requirements closely resemble those in Washington. Although the current number of lawyers who hold a license in both Colorado and Washington is unknown, as of August 2025, 458 lawyers indicated they were licensed in Colorado at the time of their admission in Washington. At its October 17, 2025, meeting, the MCLE Board decided to move forward with a suggested amendment to extend comity recognition to Colorado, making it an MCLE Board a goal for

the 2025-2026 year. At its January 2026 meeting, the MCLE Board agreed to finalize a report and seek public comment on the potential suggested amendment.

## FACTORS IN SUPPORT OF THE SUGGESTED AMENDMENT

### Colorado Comity Requirements

Like Washington, Colorado has a 3-year reporting period, requires 45 credits to be earned within that period, and has established an equity, diversity, and inclusivity credit requirement that is similar to Washington's Ethics-Equity credit in substance and intent. Given these similarities, the MCLE Board is considering recognizing Colorado as a comity state.

Colorado Rule 250 and attendant rules and regulations have an all-inclusive comity policy, where attorneys who are complaint in their home jurisdictions and meet certain conditions can use comity from any state to satisfy Colorado requirements. As such, a Washington lawyer who primarily lives in Washington, has their Washington address on file with Colorado Office of Attorney registration for the minimum time period, completes and complies with Washington requirements, and provides a certificate of good standing and Washington MCLE transcript as proof of that compliance, could attain Colorado compliance via Washington comity. The above preliminary suggested amendment would allow those who reside in Colorado to submit comity certificates from Colorado to Washington to meet their CLE requirements in Washington.

### Current MCLE Comity Fees

In Washington, lawyers may certify compliance of their MCLE requirements by paying a $25.00 comity fee and submitting a valid comity certificate from a designated comity state (Oregon, Idaho, and Utah). Additionally, Lawyers who are in compliance with their MCLE requirements may request a comity certificate from WSBA by paying a $25.00 comity certificate fee. Comity certificates are not available to those who certified their previous reporting period requirements via comity. Adding Colorado as a comity state may generate a modest amount of revenue.

| | |
|---|---|
| Comity Submission fee | $25 |
| Comity Certificate from WA fee | $25 |

### Feedback

Details about the suggested amendment are on the MCLE Board webpage[1]. Member feedback was solicited via "Take Note" email on March 18, 2026, and April 1, 2026. At its April 17meeting, no public comments were made in person, but seven survey responses were received by May 1, all supporting the amendment. Comments are included in the attached materials.

[1] https://www.wsba.org/Legal-Community/Committees-Boards-and-Other-Groups/mcle-board

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 is included in the BOG's 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 criteria is limited in size but covers areas of both revenue and expense. The current proposal would allow MCLE comity with Colorado and as noted above, this would allow the opportunity for additional comity certificate revenue which is minimal at $25 per certificate. In terms of expenses, the impact includes the cost of staff time used to draft the amendment language, incorporate the amendment into relevant records, and communicate changes to stakeholders. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and does not require additional staff or allocation of resources from other internal sources. Additionally, there could be minimal staff capacity gained for reduced processing MCLE accreditation for those submit comity certificates.

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 analyses is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all. Based on the materials provided, the suggested amendments to APR 11(6)(a) do not pose any significant equity concerns. The proposed changes will allow comity with Colorado which already allows comity with Washington for the same reason: both states have similar MCLE requirements. These changes would improve procedural fairness for legal professionals who are licensed in multiple states which have similar MCLE requirements.

Attachments

- APR 11 Preliminary Suggested Amendment—Redline
- Public Comments—Collected Feedback from Survey
- MCLE Board Report and Recommendation

**From:** Mandatory Continuing Legal Education Board
**To:** Washington State Licensed Legal Professionals & Community Members
**Date:** January 9, 2026
**RE:** **REPORT AND RECOMMENDATION OF THE MCLE BOARD COMITY WITH COLORADO**

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**Mandatory Continuing Legal Education Board**

The Mandatory Continuing Legal Education Board ("MCLE Board") consists of seven members: Darryl Colman (Chair), Katharine Denmark, Nicole Meyer, Efrem Krisher, Henry Phillips, Brendon Taga, and Justin Durueke.

**Suggested Amendment**

The MCLE Board recommends an amendment to Admission and Practice Rule (APR) 11 that would allow for licensed legal professionals to submit a comity certificate from Colorado to satisfy their Washington MCLE requirements.

The MCLE Board recommends the following suggested amendment to APR 11(c)(6):

> Comity. The education requirements in Oregon, Idaho, Colorado, and Utah substantially meet Washington's education requirements for lawyers. These states are designated as comity states. A lawyer may certify compliance with these rules in lieu of meeting the education requirement by paying a comity fee and filing a Comity Certificate of MCLE Compliance from a comity state certifying to the lawyer's subjection to and compliance with that state's MCLE requirements during the lawyer's most recent reporting period.

**Background**

The MCLE Board decided to research potential comity states after receiving feedback during the 2024 annual meeting with the Court. After conducting research into MCLE requirements in other states the MCLE Board is exploring the prospect of suggesting an amendment that would treat Colorado as a comity jurisdiction given the proximity of their CLE requirements to our own. Satisfying MCLE requirements in Washington through comity lessens the administrative burden on lawyers who are dually licensed in Colorado and Washington state. Although the current number of lawyers who hold a license in both Colorado and Washington is unknown, as of August 2025 there were 458 lawyers who cited they were licensed in Colorado at the time of their admission to the Washington state bar.

**Colorado Comity Requirements**

Comparable to Washington, Colorado also has a 3-year reporting period, requires 45 credits to be earned within that period, and has established an equity, diversity, and inclusivity credit requirement that is similar to Washington's Ethics-Equity credit in substance and intent. Given these compatibilities, the Board expressed interest in the possibility of recognizing Colorado as a comity jurisdiction.

Colorado Rule 250 and attendant rules and regulations have an all-inclusive comity policy, where attorneys who are complaint in their home jurisdictions and meet certain conditions can use comity from any state to satisfy Colorado requirements.

Colorado Supreme Court and Judicial Education Committee's Regulation 102(3) states that in order to comply via comity, an attorney must (1) have an active license issued by another state that has continuing legal education requirements and is the state of primary residence; (2) that attorney's primary residence and business address in the other state have been on file with the Colorado Office of Attorney Registration for a minimum of 45 days before the end of the attorney's CLE compliance period; (3) the attorney must complete credits in order to comply with their resident state's requirements; and (4) the attorney provides a certificate of good standing establishing CLE compliance in the resident state along with a copy of their CLE transcript that reflects the activities undertaken during their Colorado compliance period.

Given these criteria, a Washington LLP who primarily lives in Washington, has their Washington address on file with Colorado Office of Attorney registration for the minimum time period, completes and complies with Washington requirements, and provides a certificate of good standing and Washington MCLE transcript as proof of that compliance, could attain Colorado compliance via Washington comity. The above proposed suggested amendment would allow those who reside in Colorado to submit comity certificates from Colorado to Washington to meet their CLE requirements in Washington.

**Current MCLE Comity Fees**

| | |
|---|---|
| **Comity Submission fee** | **$25** |
| **Comity Certificate from WA** | **$25** |

**Attachments**

1. Admission and Practice Rule (APR) 11
2. Draft APR 11 Redline
3. Colorado Rule 250. Mandatory Continuing Legal and Judicial Education
4. Colorado Continuing Legal and Judicial Education Regulations # amended by the Court, 6/18/2025, effective 1/1/2026

**SUGGESTED AMENDMENTS TO THE APR 11 (Redline)**

**TITLE**

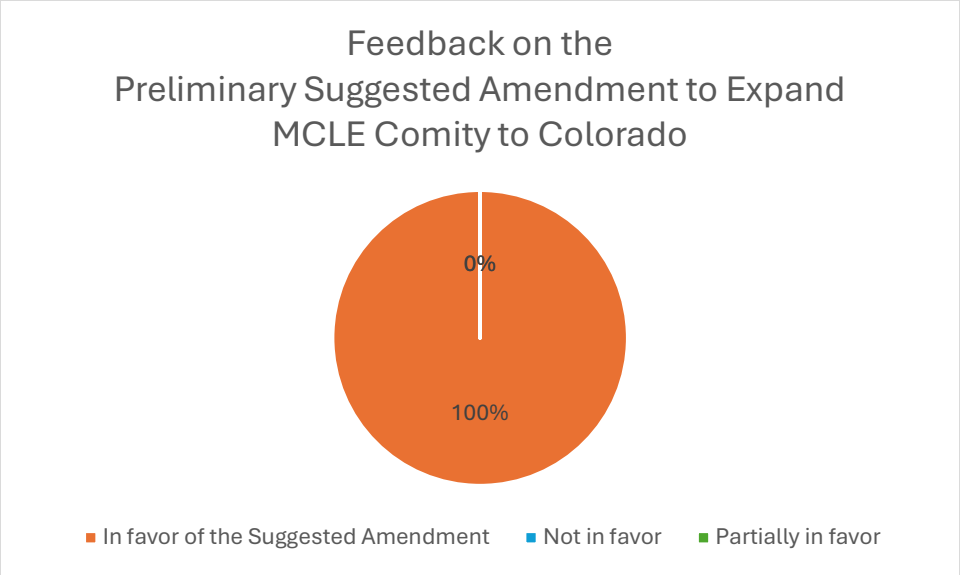
ADMISSION AND PRACTICE RULES (APR)

**RULE 11. MANDATORY CONTINUING LEGAL EDUCATION (MCLE)**

**(a) – (c)(5) No Changes.**

**(6)** Comity. The education requirements in Oregon, Idaho, Colorado, and Utah substantially meet Washington's education requirements for lawyers. These states are designated as comity states. A lawyer may certify compliance with these rules in lieu of meeting the education requirement by paying a comity fee and filing a Comity Certificate of MCLE Compliance from a comity state certifying to the lawyer's subjection to and compliance with that state's MCLE requirements during the lawyer's most recent reporting period.

**(c)(7) - (k) No Changes.**


Feedback on the
Preliminary Suggested Amendment to Expand
MCLE Comity to Colorado
0%
100%
In favor of the Suggested Amendment
Not in favor
Partially in favor

**Feedback Received as of May 1, 2026**

Regarding MCLE Board's Preliminary Suggested Amendment - Colorado Comity

| Id | Completion Date | Name | Your relationship to WSBA | Position on the MCLE Board's Suggested Amendment to APR 11 | Please provide any feedback or comments you have regarding the Suggested Amendment: |
|---|---|---|---|---|---|
| 1 | 3/18/2026 | Jamie Olivares | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | |
| 2 | 3/18/2026 | Jennifer Hayden | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I fully support the suggested amendment. I agree that satisfying MCLE requirements in Washington through comity lessens the administrative burden on lawyers who are dually licensed in Colorado and Washington State; as I am duly licensed in both states. Not only will the passage of this amendment lessen the burden on the lawyer, but will do so for the hard working MCLE Team for the WSBA that has to process my applications for credits; send and receive messages that deny or accept those applications and send notices requiring further action. |
| 3 | 3/18/2026 | Eli Creighton | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I am barred in both Washington and Colorado. I can attest that both states require similar CLE and ethics considerations, as well as similar commitments to the rule of law, diversity in practice, and progressing the profession. |
| 4 | 3/18/2026 | David Trujillo | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | |
| 5 | 3/19/2026 | Fawzy T. Simon | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I think the sooner the profession discards the antiquated notions that each jurisdiction must individually license attorneys (and any other professionals for that matter) the better it will be for the country. We have any number of “interstate compact” statutes. Why isn’t a lawyer a lawyer everywhere? Why isn’t a nurse a nurse everywhere? Why isn’t a valid driver a valid driver everywhere? I’m referring to the United States. We don’t really have control over anything else, but I wholeheartedly support this proposal |

**Feedback Received as of May 1, 2026**

Regarding MCLE Board's Preliminary Suggested Amendment - Colorado Comity

| | | | | | |
|---|---|---|---|---|---|
| 6 | 4/13/2026 | Doug Boling | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I support the amendment but would also ask that the Board consider changing rules around pro bono service so that the same activities could count towards pro bono service hours. (I have plenty of CLE credits.) |
| 7 | 4/16/2026 | N/A | Licensed legal professional (Lawyer, LLLT, LPO) | In favor of the Suggested Amendment | I came to WA from Colorado and had to let my license there go due to the dual education requirements - this is a great step in allowing folks the flexibility in practice, cutting down on attorney costs, and ensuring efficient continuing education. |

WASHINGTON STATE
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**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Kevin Plachy, Director of Advancement; Margeaux Green, Practice Management Advisor

**DATE:** June 4, 2026

**RE:** Legal Technology Taskforce Policy Recommendations

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**ACTION/DISCUSSION: First Read** — Overview of policy recommendations, stakeholder input, and BOG action pathways

## SUMMARY

The WSBA Legal Technology Taskforce delivered its final report to the BOG in September 2025. The report organizes ten Key Points and includes both operational recommendations (for staff implementation) and policy recommendations (for BOG consideration). This memo summarizes the policy recommendations, reports findings from internal stakeholder feedback, outlines BOG pathways to support future decisions. Staff have begun implementing operational work and will continue to do so while the BOG reviews policy issues.

## BACKGROUND

In November 2023, the Board of Governors identified emerging technologies—especially AI—as a strategic priority for WSBA and directed the WSBA to create the Legal Technology Taskforce (taskforce) to study impacts, opportunities, and risks for the profession and the public. The taskforce began its 15-month work in May 2024 and evaluated Washington's legal technology landscape, developed recommendations to promote effective, efficient, and ethical technology use, and delivered its final report to the BOG in September 2025 for follow up by the Executive Committee and staff.

### Operational Work Underway

Staff are moving forward on operational items that fall within existing authority and our consistent with our FY26-29 Strategic Plan, under the direction of the Executive Director. This includes ongoing operational work for technology-related education and CLE planning; and internal coordination across several program areas including Practice Management, Continuing Legal Education, Member Services and Engagement, and Professional Responsibility. Operational recommendations are being implemented by WSBA staff with input and support from the Technology Implementation Workgroup that was established by the Executive Director in May 2026.[1]

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[1] The WSBA Technology Implementation Workgroup Charter, approved by the Executive Director in May 2026, establishes a staff-led group supported by volunteer subject-matter experts with experience in legal technology, AI, cybersecurity, practice management, ethics, and access-to-justice issues. Although the workgroup has not yet been formally convened, the charter outlines a structure in which WSBA staff project leads collaborate with appointed volunteers through topic-based subgroups to advance implementation of the Taskforce's operational recommendations.

## EXECUTIVE OVERVIEW OF POLICY RECOMMENDATIONS

The policy recommendations for the BOG to consider appear in Key Points 2, 3, 6, 7, 8, and 9 of the taskforce report and recommendations. Staff will present Key Point 10 to the BOG at the September meeting. The next section presents each recommendation by Key Point, and includes stakeholder input, staff findings, and possible BOG pathways for action and future decision making.

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## KEY POINT 2 — BUILDING WSBA CAPACITY AND STRATEGIC PARTNERSHIPS

**Recommendations:**
The taskforce recommends that the WSBA develop a Strategic Technology Plan to align internal capacity, member support efforts, and strategic partnerships over a multiyear horizon.

**Stakeholder Input:**
The BOG has already identified technology as a strategic priority, and it has been included in the three-year WSBA Strategic Plan which runs from 2026 through 2029.

**Possible BOG Pathways:**
Given that technology is already a strategic priority within the current WSBA Strategic Plan, we do not believe that additional action by the BOG is required to implement this recommendation.

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## KEY POINT 3 — SUPPORTING TECHNOLOGY COMPETENCE: MEETING DIVERSE PRACTICE NEEDS

**Recommendations:**
The taskforce recommends pursuing a technology MCLE requirement to ensure baseline technology competence and exploring technology content for the Bar Exam.

**Stakeholder Input and Findings:**
Technology MCLE Requirement

- The Washington Supreme Court (Supreme Court) has tasked the MCLE Board with suggesting amendments to Admission and Practice Rule 11 as necessary to fulfill the purpose of MCLE. Suggested amendments are subject to review by the BOG and approval by the Supreme Court.
- In 2023 the MCLE Board sought support from the BOG on their recommendation to create a stand-alone mental health credit requirement and a stand-alone technology security requirement. As part of its outreach the MCLE Board sought public comment and nearly 1,000 members responded. Approximately 2/3 of members responding to the survey were opposed to the amendments. At its August 11, 2023 meeting, in a vote of 4-6-1, the BOG voted against supporting the stand-alone technology security requirement. The Supreme Court rejected the proposal at that time. However, this occurred before the creation of the taskforce (May 2024) and the release of its report and recommendations (September 2025).
- The taskforce's work included surveying members on their current use and understanding of technology and AI. When asked whether adding a MCLE requirement for a technology related CLE would be beneficial to the legal profession 72% agreed (slightly, moderately or strongly combined).
- Staff will share this recommendation and survey context to the MCLE Board at the August meeting.



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- Stakeholder attendees for these items included Kevin Plachy, Margeaux Green, Renata Garcia, and Adelaine Shay.

Explore Adding Technology and the Law as an Area in the Bar Exam

- Stakeholders suggest that the most practical pathway for incorporating technology or AI content into the licensing process is through the Washington Law Component (WLC) rather than the national bar exam. The WLC is a state specific, self-administered exam updated annually by the Board of Bar Examiners, with Doug Ende, Chief Disciplinary Counsel, developing the ethics topic outline that informs the exam content.
- Stakeholders noted that any adjustments to include technology or AI concepts would need to reflect Washington specific law and ethics expectations, and could be informed by upcoming amendments to the RPC comments related to AI, which the Committee on Professional Ethics plans to present to the BOG in July. Once the BOG approves the suggested amendments, the WSBA will prepare a GR9 and send the proposed amendments to the Supreme Court. Publication of the proposed amendments will go on both the WSBA and the Court's website for comments. When the Supreme Court finalizes those comment updates, staff anticipate that the WLC's ethics outline may be updated accordingly.
- The National Conference of Bar Examiners (NCBE) develops, administers, and reports results for the Multistate Professional Responsibility Examination (MPRE). The WSBA has no authority over this portion of the Bar Exam but could advocate for such a change.
- Stakeholder attendees for these items included Kevin Plachy, Margeaux Green, Renata Garcia, Bobby Henry, and Ramana Pendyala.

**Possible BOG Pathways:**

Technology MCLE Requirement

The BOG may consider whether it wishes to provide a preliminary position to the MCLE Board regarding the concept of a technology MCLE requirement. The BOG may also direct staff to continue monitoring the MCLE Board's discussion and return with updates after the August meeting.

Explore Adding Technology and Law as an Area in the Bar Exam

Does the BOG have input on the idea of incorporating technology ethics-related questions into the Washington Law Component of the Bar Exam? Because the NCBE has full authority over the MPRE, the BOG has no direct decision-making in exam content. If desired, the BOG may explore whether to engage in optional advocacy by submitting letters or feedback to the NCBE regarding the inclusion of technology and AI ethics topics in the MPRE.

## KEY POINT 6 — STRENGTHENING COURT CAPACITY: ADVANCING JUSTICE THROUGH DIGITAL TRANSFORMATION

**Recommendations:**

The taskforce recommends that the courts modernize their operations with technology by:
- providing comprehensive AI and technology training,
- upgrading courtroom technology,
- updating electronic evidence rules,



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- implement AI detection tools,
- enhancing language access using technology,
- simplifying court forms and e-filings,
- advocate for standardized, statewide court data infrastructure fully funded by the State.

**Stakeholder Input and Findings:**

- Internal discussions emphasized that these efforts are court led and that WSBA's role is collaborative or advocacy focused when invited. The WSBA Court Rules Committee could have a role in reviewing electronic rules of evidence.
- Stakeholders noted that the BOG recently voted to study court unification, that the Legislature is studying this question, and that WSBA is staffing the legislative taskforce; therefore, the BOG action on statewide infrastructure should wait for taskforce findings.
- Stakeholder attendees for these items included Terra Nevitt, Kevin Plachy, Margeaux Green, Sara Niegowski, Diana Singleton, Nicole Gustine, Melly Diaz, and Dawn Marie Rubio (Administrative Office of the Courts).

**Possible BOG Pathways:**
The BOG may request a review of the electronic rules of evidence by the Court Rules Committee. The BOG could defer its positions on statewide court data infrastructure until legislative taskforce findings are available. The BOG could set collaboration principles for WSBA's engagement with courts or request targeted follow ups where court partners ask for WSBA assistance.

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## KEY POINT 7 — LAW SCHOOLS & APR 6 LAW CLERK PROGRAM

**Recommendations:**
The taskforce recommends law schools:
- embrace a technology conscious culture,
- maintain a practice ready curriculum,
- assess student progress related to technology competencies,
- support faculty in integrating technology into legal education,
- participate in broader policy development.

The taskforce expects similar technology-related preparation for APR 6 law clerks to ensure consistency for future Washington lawyers.

**Stakeholder Input and Findings:**

- Internal discussions confirmed the BOG's limited authority over law schools and emphasized that most actions in this area are operational or involve advocacy rather than BOG directed policy.
- Participants recommended including APR 6 law clerks in the analysis because the WSBA has greater oversight of that program and clerks should have comparable technology related learning opportunities. Stakeholders discussed potential innovations such as technology focused clinics or incubators.


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- Stakeholders noted that the WSBA already engages with law schools across multiple departments and entities, including mentorship and outreach efforts, and that these activities should be coordinated to support consistent messaging and opportunities related to technology competence.
- The Chair of the Legal Technology Task Force provided the law school related recommendations to each of the Washington law school Deans once the report was accepted by the BOG.
- Stakeholder attendees for these items included Kevin Plachy, Margeaux Green, Renata Garcia, Julianne Unite, and Chelle Gegax.

**Possible BOG Pathways:**
The BOG may choose to signal high level support for integrating technology competence into legal education statewide. In addition, the BOG may consider whether to incorporate technology-related expectations into the APR 6 program or future alternative licensure pathways.

## KEY POINT 8 — ADVANCING ETHICAL INNOVATION AND EQUITABLE ACCESS (AI & ATJ)

**Recommendations:**
The taskforce recommends:
- establishing ethical boundaries for AI legal tools,
- expanding court-based AI resources (in coordination with Key Point 6),
- and fostering development of affordable and scalable tools that improve access to justice.

**Stakeholder Input and Findings:**
- Stakeholders noted overlaps with the Entity Regulation Pilot Program, but also identified gaps, particularly regarding AI provider transparency and accountability, which fall outside the pilot's scope.
- Stakeholders discussed the need for further analysis of this point's alignment with WSBA's mission.
- For court-based AI resources, stakeholders emphasized that this work is court led. The ATJ Committee is already active in court modernization efforts through its liaisons and engagement with AOC partners.
- For development of affordable legal technology tools, stakeholders identified the ATJ Board, the AI & Access to Justice Initiative, and potential partners such as OCLA, LFW, OPD, and Techtonic.
- Stakeholder attendees included Kevin Plachy, Margeaux Green, Renata Garcia, Diana Singleton, Jeanne Marie Clavere, and Bonnie Sterken.

**Possible BOG Pathways:**
The BOG may consider whether it wishes to take a position on any aspect of this Key Point and request a legal risk analysis with respect to any engagement with AI-related consumer protection and technology provider accountability issues. The BOG may also choose to signal support for continued coordination with ATJ and court partners on court-based AI resources, which remain court led efforts.



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## KEY POINT 9 — SAFEGUARDING SENSITIVE LEGAL DATA: STRENGTHENING CONSUMER PROTECTION

**Recommendations:**
The taskforce recommends advocating for updated consumer protection laws, advocating for enhanced consumer privacy protections, and developing consumer focused certification programs to help the public identify trustworthy legal technology tools.

**Stakeholder Input and Findings:**
- Internal discussions raised the need for further analysis of this point's alignment with WSBA's mission.
- WSBA staff can flag issues to agencies with appropriate jurisdiction and focus on member education materials or public checklists that remain within operational bounds.
- Stakeholder attendees for these items included Kevin Plachy, Margeaux Green, Sara Niegowski, and Laurie Powers.

**Possible BOG Pathways:**
The BOG may consider whether it wishes to take a position on any aspect of this Key Point and request a legal risk analysis. Only after that assessment could the BOG consider whether it sees a role for WSBA in elevating concerns to appropriate external agencies, or whether it prefers to refrain from taking a position on this Key Point.

## LEGAL / EQUITY / FISCAL ANALYSIS

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

The risk analysis is in the BOG's 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 of the proposed recommendations is primarily staff time used to assist in drafting the recommendations, incorporating the changes into relevant records and systems, and communicating changes to stakeholders. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and does not require additional staff or allocation of resources from other internal sources. It is possible that there may be some direct expense impact in terms of volunteer reimbursements for applicable travel, meals, and lodging for participation additional meetings and any other relevant work resulting from the recommendations, however we do not anticipate these costs to be material based on the existing information.

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 analyses is to understand how entities incorporated an equity lens into proposed action items presented to the BOG. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all. Given the WSBA is in the preliminary stages of determining paths for addressing the recommendations and specific actions have not yet been proposed, a substantive equity analysis of most of these recommendations is premature.

However, equity analysis guidance is requested for potential proposals for an MCLE Technology Requirement and exploring technology content in the bar exam. As noted in the Taskforce Report, the Committee used the Access to Justice Technology Principles as a guide as well as an equity lens of noting the importance of meeting members where they are based on their needs. That said, as the Taskforce and other entities like the MCLE Board and Committee on Professional Ethics, we encourage the application of same equity and justice lenses. We encourage policy makers to consider accessibility when determining whether to require technology competence, asking whether members have meaningful access to technology and/or encounter barriers to technology. For example, there may be varying levels of access to reliable broadband, updated devices, and digital literacy among members based on their geographic location, social identities, and social-economic circumstance. If exploration of the possibility of adding the cybersecurity and technology to the bar exam, the BOG should not only consider accessibility and apply equity and justice lenses, it should consider how to incorporate into other pathways to licensure which are currently under development.

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## ATTACHMENTS

- WSBA Legal Technology Taskforce Final Report & Recommendations
- Taskforce Policy Recommendations Overview
- WSBA Technology Implementation Workgroup Charter



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2025 WSBA LEGAL TECHNOLOGY TASK FORCE REPORT

# Embracing Change: Strategic Roadmap for Washington's Legal Profession in a Time of Technology Disruption


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# Acknowledgments

This compilation of work would not be possible without the dedicated contributions of the members of the WSBA Legal Technology Task Force.

## THANK YOU TO ALL OF THE CONTRIBUTING MEMBERS.

| NAME | POSITION |
|---|---|
| **Jenny Durkan** | *Chair* |
| **Kevin Plachy** | *WSBA Staff Liaison* |
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| **Michele Carney** | *WSBA Member* |
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# Executive Summary

The Washington State Bar Association Legal Technology Task Force presents this comprehensive report of findings and recommendations on how the Washington State Bar Association (WSBA) can support legal professionals in Washington in understanding and adopting emerging technologies, particularly generative artificial intelligence (AI) and advanced data analytics.

Additionally, the report addresses the roles, responsibilities and impacts of entities outside of the WSBA in this technological transformation, and these entities are also the subject of some of the recommendations in the report.

## THESE RECOMMENDATIONS FALL WITHIN 10 KEY POINTS:

1 **Harnessing Potential: The Role of Practitioners**

Legal professionals must integrate new technology tools into their daily work to serve clients efficiently, ethically, and competently. This includes understanding the implications of AI and other emerging technologies.

2 **Building the WSBA's Capacity and Strategic Partnerships: Innovating Responsibly and Ensuring Equitable Access**

The WSBA should build sustained internal capacity and create strategic partnerships with technology providers to support members in navigating technological change.

3 **Supporting Technology Competence: Meeting Diverse Practice Needs**

The WSBA should offer tailored guidance and support to help members build technology competence over time, addressing the varying needs of different practice settings. This includes affordable access to education focused on the use, limitations, and benefit of emerging technology.

4 **Building Ethical Frameworks for Technology Use: Supporting Professional Values in a Digital Age**

The Task Force emphasizes the importance of ethical adoption of technology and calls for the development and use of practical frameworks for evaluating new technologies and maintaining professional standards.

5 **Bridging the Cybersecurity Confidence Gap: From Confidence to Competence**

The WSBA should establish clear cybersecurity standards and offer affordable security training to help legal professionals protect client information and maintain public trust.

6 **Strengthening Court Capacity: Advancing Justice through Digital Transformation**

The rule of law and access to justice depends on our courts. The report calls for comprehensive AI training for court personnel, upgrading courtroom technology, implementing AI detection tools to enhance the administration of justice, and a standardized, modern, statewide court data infrastructure fully funded by the State and designed to support integration, efficiency, and equitable access to justice.

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**7 Supporting Future Professionals: Transforming Legal Education for the Digital Era**

Washington's law schools must comprehensively embed technology across curricula and educational experiences, building not just awareness, but deep technological proficiency.

**8 Advancing Ethical Innovation and Equitable Access: Leveraging AI to Close the Justice Gap**

The WSBA should ensure that AI-driven legal assistance supports meaningful access to justice by promoting the development of standards and supporting the creation of AI applications that are accurate, ethical, and designed with the public interest in mind.

**9 Safeguarding Sensitive Legal Data: Strengthening Consumer Protection in a Digital Era**

The Task Force highlights the need for clear cybersecurity standards, affordable security assessments, and transparency in cybersecurity practices to protect client information and maintain public trust.

**10 Ensuring Regulatory Innovation and Stability: Future Expertise and Oversight**

Technology is developing at rapid rates. Courts, lawyers, and the rules governing them cannot remain static or the chance of forced obsolescence is real. The Task Force recommends establishing a Supreme Court-affiliated board to provide expertise, oversight, and guidance on legal technology and regulatory innovation.

1. Board of Governors November 2023 Meeting Update, Washington State Bar Association (2023), https://www.wsba.org/docs/default-source/about-wsba/governance/bog-meeting-recaps/board-of-governors-meeting-recap-nov.-2-3-2023.pdf?sfvrsn=987f1cf1_2.
2. *Legal Technology Task Force Charter,* Washington State Bar Association (March 7, 2024), https://www.wsba.org/docs/default-source/legal-community/committees/legal-technology-task-force/wsba-legal-technology-task-force-charter.pdf?sfvrsn=3e881ff1_1.

## WHY WAS THE TECHNOLOGY TASK FORCE CREATED?

In November 2023, the WSBA Board of Governors recognized the transformative impact of technology, particularly artificial intelligence (AI), on the legal profession.[1] As one of its strategic priorities for the 2023-24 fiscal year, the Board adopted the following statement:

> ***"Assess technology-related opportunities and threats and determine WSBA's role vis-à-vis regulation, consumer protection, and support to legal professionals."***

The creation of the Legal Technology Task Force is a step towards acting on this priority. The Task Force worked to assess the legal technology landscape, identify threats and opportunities across various legal sectors, and make recommendations that support and strengthen the understanding and use of technology in members' practice.[2] The Task Force's report emphasizes the effective, efficient, and ethical use of technology to enhance equitable access to justice.

As part of its work, the Task Force distributed a survey in October 2024 to more than 10,000 WSBA members and received 516 responses representing a wide range of practice areas, firm sizes, and geographic regions. This 5% response rate yields a 98% confidence level with a 5% margin of error. Using the Washington State Supreme Court's Access to Justice Tech Principles as a guide, the Task Force makes these recommendations to the Board of Governors on tangible steps WSBA can take to support and strengthen the use of technology within the legal profession in Washington state.

# A Defining Moment

Legal services and technology have long been intertwined. The legal profession has largely embraced technologies that make organizing, transmitting, and accessing information easier—from word processing, e-discovery, databases, and filing systems to cloud platforms and communication tools.

But today's emerging technologies, particularly generative AI and advanced data analytics, are fundamentally different. These tools don't merely help legal professionals organize and access information—they generate, synthesize, and extract insights in ways that challenge our traditional understanding of legal work and professional responsibilities. They derive their power from combining and using data sets in unprecedented ways and perform complex analytical tasks at unprecedented scale. As such, they raise urgent questions as to whether they will not just augment but substitute for aspects of human learning, judgment, and analysis.

This is a defining moment for the legal profession. AI is already transforming legal practice, court operations, and client expectations. It will not replace lawyers, but it will change how lawyering is done.[3] That change is already underway, and the pace is accelerating. Legal professionals need to understand these new technologies not only for efficiency and productivity but also to remain competitive and responsive to their clients' evolving needs. Current approaches to profitability, efficiency, competitiveness, and legal ethics all demand adaptation. While these approaches promise new benefits, they also present complex risks that legal professionals must navigate to remain competitive and responsive to their clients' evolving needs.

**AI is already transforming legal practice, court operations, and client expectations. It will not replace lawyers, but it will change how lawyering is done.**

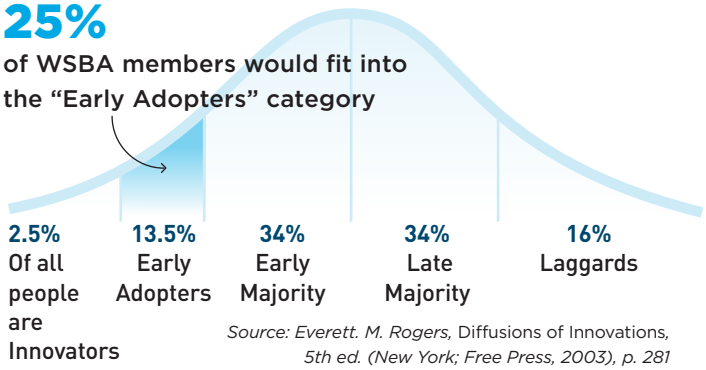
3. Ken Crutchfield, *AI Won't Replace Lawyers — But It Will Change How They Work*, Above the Law (March 26, 2024), https://abovethelaw.com/2024/03/ai-wont-replace-lawyers-but-it-will-change-how-they-work/.

# Meeting Members Where They Are

WSBA members are not all in the same place when it comes to legal technology. Some are actively experimenting, while others are just beginning to learn. Many remain uncertain, or face barriers to adoption such as cost, time, or lack of training.

This is normal. As described by Everett Rogers' "Diffusion of Innovation" model,[4] technology adoption occurs along a predictable curve: from innovators and early adopters to the early and late majority, to eventually laggards. The goal is not to rush all legal professionals into using AI or any single tool. The goal is to meet members where they are, with practical, tailored guidance and support that helps them build the necessary technology competence.

### "Diffusion of Innovation" model




*Source: Everett. M. Rogers,* Diffusions of Innovations, *5th ed. (New York; Free Press, 2003), p. 281*

The Task Force's recommendations reflect this approach. They are not one-size-fits-all. Some are directed at the WSBA itself, calling for internal reforms, new resources, and dedicated staff capacity. Others look outward, calling for collaboration with courts, law schools, technology providers, and legal employers. Across all sectors, this report emphasizes ethical adoption, thoughtful experimentation with an eye towards expanding access to justice, and member support.

**The goal is to meet members where they are, with practical, tailored guidance and support that helps them build the necessary technology competence.**

4. Bill Henderson, *What is the Rogers Diffusion Curve? (004)*, Legal Evolution (May 8, 2017), https://www.legalevolution.org/2017/05/rogers-diffusion-curve-004.

# More Than a Trend: A Structural Shift

The legal profession is experiencing a fundamental shift in how technology is transforming legal work—not merely how quickly practitioners adopt it. Generative AI is the most visible example of the shift, but it is not the whole story.

Over the past decade, AI has quietly become embedded in everyday legal tools, e-discovery platforms, legal research engines, contract review software, and even word processors. As with earlier technological leaps, like the introduction of online research in the 1990s or cloud-based practice management tools in the 2010s, initial skepticism is giving way to necessity. In the years ahead, AI likely will become a baseline component of legal competence, even for those who choose not to use it directly.[5]

These changes will reshape how lawyers work, how courts operate, and how clients access legal services. AI is already changing billing models, research strategies, client communication, and even the way courts manage filings and review evidence. These technologies offer opportunities to enhance access to justice, improve language access, and streamline routine legal tasks. But they also pose risks to those fundamental aspects and raise concerns about inaccurate outputs, bias, data security concerns, and a potential erosion of trust in legal professionals. Legal professionals must understand these risks to serve clients competently and ethically and WSBA should support them in these efforts.

**AI is already changing billing models, research strategies, client communication, and even the way courts manage filings and review evidence.**

5. Tom Martin, *AI in the Legal Profession: Separating Substance from Hype*, The National Law Review (Oct. 9, 2024), https://natlawreview.com/article/ai-legal-profession-separating-substance-hype.

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# Meeting the Moment: Washington's Opportunity to Lead

Washington's legal community is uniquely positioned to lead. With respected law schools, innovative legal professionals, and proximity to major technology companies, Washington is situated at the intersection of innovation and public service.

The Task Force believes that Washington can model how to embrace legal technology in a way that protects the public, upholds professional values, and improves the delivery of legal services and access to justice.

Technology is not an end in itself, especially not in the delivery of effective legal services. At the same time, it has become both a critical tool for legal practice and an essential subject matter that practitioners must understand. The WSBA Technology Survey Report: Preliminary Findings[6] (the Survey) shows a notable gap: Only 25% of survey respondents currently use AI in their practice, that rises to 70% among in-house counsel. But the implications of technology extend far beyond direct usage. As these technologies become increasingly ubiquitous in society, they challenge legal professionals to navigate both their application in practice and their role in shaping our world. Lawyers must also understand how the technology affects their clients' opportunities and challenges. The profession cannot opt out of this transformation—as one Task Force member noted, "the toothpaste is not going back in the tube."

Legal professionals need to embrace and leverage technological change rather than resist it. Practitioners have a special role not only as advocates for their clients but also as officers of the court with responsibility for the quality of justice, including safeguarding the rule of law. Understanding technologies like AI is becoming fundamental to fulfilling these obligations—from ensuring the authenticity of evidence to protecting client confidentiality, and from expanding access to justice to maintaining public trust. By pairing these developing tools with highly competent professionals, it is possible to enhance access to legal services and improve the overall quality of legal services.

As AI reshapes legal work, the profession must integrate these tools without compromising human judgment, strategic thinking, and ethical standards that form its essential value. Technology can enhance efficiency, but the profession's core value lies in human expertise and experience, strategic thinking, and the ability to navigate complexity. The legal profession must ensure that AI adoption strengthens—not weakens—the ethical foundations and public trust that define its role in society.

**This moment is not just about catching up to change. It is about shaping the future of the profession.**

6. *WSBA Technology Survey Report: Preliminary Findings*, Washington State Bar Association (April 2025), https://www.wsba.org/docs/default-source/legal-community/committees/legal-technology-task-force/wsba-technology-survey-report.pdf?sfvrsn=fd1e1bf1_1.

# Ten Key Points

The Task Force developed ten key points to guide these efforts. Within each of the key points, the framework is set for the recommendations that follow.

The recommendations offer a roadmap for shaping the future of the legal profession through education, ethical guidance, regulatory clarity, and cross-sector collaboration. Throughout all the key points the focus remains clear: advance member competence, strengthen public protection, increase access to justice, and ensure that technology enhances, not undermines, our core values as legal professionals.

The key points are grouped to reflect where leadership and action are needed. They begin with the role of the individual practitioner—because above all else, effective and ethical practice in the age of AI depends on member engagement. No matter what steps the WSBA or the courts take, a legal professional's own understanding and judgment are foundational. Subsequent sections address the assessment of the institutional responsibilities of the WSBA, courts, law schools, and policymakers to provide the guidance, infrastructure, and regulation necessary to support members and protect the public.

## 1 Harnessing Potential: The Role of Practitioners

Legal professionals must proactively build their understanding of emerging technologies, particularly AI, to serve clients competently and uphold their professional obligations. While institutions like the WSBA and the courts have important roles to play in guiding AI adoption in legal settings, each practitioner is ultimately the steward of their own practice and their representation of clients. Individual professionals are best positioned to determine how to integrate new tools into their daily work, ensuring that they serve their clients and other stakeholders efficiently, ethically, and competently. At the same time, making sound determinations will depend greatly on understanding the uses and implication of emerging technology.

Generative AI, in particular, presents a dual learning challenge for the legal profession. It is both a tool for enhancing legal practice and a subject that demands understanding due to its quickly evolving capabilities and pervasive role in society. Legal professionals must grasp its implications as generative AI manifests in the real world. Within the practice, this means understanding how it impacts clients' lives—from issues like automated contracts and disputes over algorithmic bias to new vulnerability for fraud and other harms. In litigation contexts it will touch everything such as evidence authentication and deepfakes. In society, practitioners have a special role not only as advocates for their clients but also as officers of the court with responsibility for the quality of justice, including safeguarding the rule of law.

Generative AI is rapidly becoming a subject matter that legal professionals must understand, even if they opt not to use these tools themselves. For example, as AI-generated content, such as deepfakes and altered documents, becomes more prevalent, legal professionals must develop a foundational understanding of these technologies to effectively challenge or defend evidence in court. Judges and

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juries may also rely on expert testimony built using generative AI outputs, requiring legal professionals to critically engage with and cross-examine such testimony. The growing use of generative AI also introduces new cybersecurity threats, such as sophisticated fraud schemes, malicious deepfake content, physical threats and harassment, and AI-driven attacks designed to bypass traditional security measures.[7] Practitioners must understand these evolving threats to effectively advise clients and protect their own practices from vulnerabilities associated with AI-generated content.

Moreover, as AI becomes pervasive in areas like hiring, lending, and insurance underwriting, legal professionals will increasingly encounter disputes where algorithmic decisions are central to their clients' claims, rights, and opportunities. Understanding how algorithms are designed and trained, where biases can arise, and what remedies may be available will be critical for advising clients effectively. Federal and state agencies are investing in generative AI tools to help streamline and accelerate decisions that may impact access to benefits, with positive outcomes in many cases, but also with room for errors that may go unexplained or uncorrected.[8] All practitioners, whether they adopt AI or not, will need AI competencies such as the ability to evaluate fairness and legality of algorithmic practices in corporate, employment, and civil rights contexts.

This is a moment to be proactive, experiment, and learn. Every legal professional, regardless of practice area or experience, has an opportunity (and obligation) to take a hard look at their own work and ask: Am I leveraging the best tools and learning available to serve my clients fully and well? Am I doing so securely and responsibly?

**Generative AI is rapidly becoming a subject matter that legal professionals must understand, even if they opt not to use these tools themselves.**

AI and other legal technologies are rapidly expanding what is possible in legal practice, from streamlining research and document drafting to improving client communication and case strategy. Practitioners who actively engage with these technologies—and proactively build their cybersecurity competence—can thrive in this evolving landscape.[9] This means staying informed about emerging digital threats, regularly updating security practices, and ensuring robust protection of client information. It also means engaging with WSBA so it can serve the needs of its members.

## RECOMMENDATIONS

A **Build Technology Competence:** Legal professionals must actively seek to understand how emerging technologies, particularly generative AI, impact their practice areas, client needs, and ethical obligations.

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7. Kristopher Turner, *Deepfakes and the Legal Profession*, WisBar (Jan. 2025), https://www.wisbar.org/NewsPublications/WisconsinLawyer/WisconsinLawyerPDFs/98/01/21_23rev.pdf.
8. Sanam Hooshidary, Chelsea Canada, and William Clark, *Artificial Intelligence in Government: The Federal and State Landscape*, NCSL (Nov. 22, 20224), https://www.ncsl.org/technology-and-communication/artificial-intelligence-in-government-the-federal-and-state-landscape.
9. Natalie Pierce and Stephanie Goutos, *Why Lawyers Must Responsibly Embrace Generative AI*, Vol. 21 Berkley Business Law Journal p.1-51, (2023).

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B **Start Small, Learn Fast:** Legal professionals should begin by becoming comfortable identifying common generative AI uses within their existing workflows. Starting small can build familiarity and confidence quickly.

C **Use Simple, Practical Resources**: Legal professionals should take advantage of short articles, checklists, and simple tools designed specifically for ease of use—especially those developed by the WSBA or other professional legal associations—to support issue spotting and evaluation of different technologies.

D **Collaborate to Accelerate Learning:** Legal professionals should engage with colleagues to share real-world examples and experiences involving technology to support legal practice. Peer discussions can clarify concepts and surface practical strategies that are already working in similar practices.

E **Stay Curious and Flexible:** Legal professionals should remain open to exploring how generative AI and other legal technologies may affect their practice. Incremental experimentation can reduce pressure and help practitioners adapt to change more effectively.

## 2 Building the WSBA's Capacity and Strategic Partnerships: Innovating Responsibly and Ensuring Equitable Access

To support members in navigating technological change, the WSBA must invest in internal capacity, cross-sector partnerships, and accessible technology education. Due to varying levels of preparedness and resources, WSBA members are facing rapid technological changes unevenly and often without the support needed to evaluate, adopt, or implement new tools. Small and mid-sized firms, in particular, often lack access to the training, guidance, and infrastructure they need to navigate this transformation while upholding ethical and professional standards.

The legal profession is experiencing unprecedented technological change, affecting everything from court operations and client service delivery to the tools available to consumers and litigants.[10] The Survey reveals the scope of this transformation—and the growing demand for support. While 70% of in-house counsel responding are already using AI tools, adoption drops to just 22% in small and mid-sized firms—not because these tools are irrelevant, but because practitioners lack the resources, guidance, and support to evaluate and implement them effectively. Early publicity about the potential flaws in AI also enforced doubts and suspicions about its efficacy and ethical framework. This disparity reflects a broader challenge: WSBA members need sustained, practical support to navigate technological change while maintaining their ethical obligations and professional standards. The WSBA made legal research tools available to members because they were indispensable yet inaccessible for many. It will need a similar approach for new tools.

The Survey shows that 69% of respondents believe AI use will require additional training and skills, yet only 26% rate their current knowledge as "good" or better. Members are seeking help with everything

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10. Drew Simshaw, *Access to A.I. Justice: Avoiding an Inequitable Two-Tiered System of Legal Services*, Vol. 24 Yale Journal of Law and Technology p.150-226, (2022).

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from evaluating technology tools to implementing security measures, understanding ethical implications, and adapting their practice models. These needs are not static—they evolve alongside the technologies themselves and as ethical frameworks develop to meet new challenges. As one Task Force member noted, "training and support for members are not a 'one and done' experience."

Ensuring that members can effectively navigate technological transformation is central to WSBA's mission to serve the public, champion justice, and uphold professional competence. To fulfill this mission amid rapid technological change, WSBA must build sustained internal capacity and establish flexible structures for ongoing support and collaboration. This includes assessing staffing capabilities, exploring the creation of a dedicated WSBA technology innovation workgroup to offer practical guidance, and investing in infrastructure for continuous education and resource delivery.

Strategic partnerships with technology providers are essential to bridge the adoption gap, especially among solo, small firm, rural, and underserved practitioners. These partnerships can expand access to AI-powered tools like AI legal assistants, document automation platforms, and practice management systems, prioritizing affordability and ease of use.

**According to the WSBA study, 70% of in-house counsel responding are using AI tools, but adoption drops to just 22% in small and mid-sized firms.**

Vendor-led training can help members evaluate and adopt tools confidently, without creating added burdens for WSBA staff.

The WSBA should maintain transparency and fairness in vendor partnerships by offering a straightforward process for vendors to submit proposals to be offered to WSBA members. While the WSBA offers a discount network and has one preferred insurance provider, it does not broadly endorse specific legal technology tools. Future partnerships should support member access without favoritism, focusing on helping members evaluate tools independently, securely, and ethically. There must also be a system for ongoing evaluation of tools so members do not get stuck with outdated technology.

## RECOMMENDATIONS

A **Expand and Tailor Member-Focused Technology Education:** The WSBA should collaborate with technology vendors, law schools, and other industry experts to develop and implement a core curriculum focused on AI literacy, cybersecurity, ethics, and technology best practices. Training should be practical, accessible in multiple formats (e.g. CLEs, webinars, on-demand videos, and written guides), and especially responsive to the needs of solo and small firm practitioners. The WSBA should also offer advanced CLEs for deeper engagement with specialized tools.

B **Launch Interactive Workshops:** Experimental learning is critical to raising competence in emerging technology. The WSBA should create interactive, hands-on workshops offering practical, low-risk opportunities for members to directly experience emerging legal technologies.

C **Establish Dedicated Technology Expertise:** The WSBA should evaluate staffing capacity to

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ensure adequate expertise and resources are available for monitoring legal tech trends and providing responsive, ongoing member support including one-on-one consultations through the Practice Management Program. The WSBA should also explore technology mentorship or peer learning groups focused on legal tech implementation.

D **Develop a Strategic Technology Plan:** The WSBA should publish a comprehensive, multi-year strategic plan outlining goals, timelines, and priorities for advancing technology competence across the profession. Regular progress reporting and member surveys should track improvements in adoption, training, and ethical integration.

E **Centralize Technology Resources:** The WSBA should create a user-friendly online Technology Resource Hub with resources such as curated checklists, sample policies, toolkits, vendor directories, FAQs, and training materials.

F **Expand and Maintain the Practice Management Discount Network:** The WSBA should strengthen its vendor partnerships by expanding the Practice Management Discount Network. This includes transparent vetting processes, clear evaluation standards, and vendor accountability, while maintaining neutrality and fairness in offerings. The WSBA should partner with vendors to expand access to affordable technology tools and offer demonstrations, CLEs, and interactive trainings.

G **Form a WSBA Technology Implementation Workgroup:** The WSBA should establish a time-limited workgroup to collaborate with WSBA staff and stakeholders on implementing technology-focused recommendations, including development of tools, training resources, and member engagement strategies.

H **Pilot a WSBA Technology Showcase Event:** The WSBA should organize a large-format event featuring legal tech vendors, CLE speakers, and hands-on demonstrations to help members explore emerging tools in an interactive environment.

## 3 Supporting Technology Competence: Meeting Diverse Practice Needs

The WSBA must meet members where they are by tailoring support and education to different practice settings and needs. Technology competence has become fundamental to legal practice, but the path to achieving it varies dramatically across the legal profession. The Survey reveals both universal needs and stark disparities: while 69% of respondents recognize their need for additional technology training, their ability to access and implement that training varies significantly by practice setting. The contrast is particularly striking between large organizations with dedicated IT support and small or rural practices managing technology alongside daily client demands.[11]

These disparities extend beyond resources to fundamental differences in how technology serves different practices. In-house counsel, with 70% AI adoption rates, need advanced training on emerging tools. Meanwhile, small and rural practitioners seek immediately applicable solutions for routine tasks like document drafting and calendaring. As one

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11. Abigail Peterson, *2024 Solo and Small Firm Tech Report*, American Bar Association (April 21, 2025), https://www.americanbar.org/groups/law_practice/resources/tech-report/2024/2024-solo-and-small-firm-techreport/.

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practitioner noted in the Survey, "We need practical tools that work in the real world, not theoretical knowledge about AI." This diversity of needs demands an approach to education and support that is both comprehensive in scope and flexible in delivery.

The Survey points toward a strategic, targeted approach to training and competency building. While 72% of respondents support a technology-focused MCLE requirement, their needs and preferences vary significantly.

## RECOMMENDATIONS

A **Provide Free or Low-Cost Educational Opportunities:** The WSBA should offer programs covering technology basics, ethics (including confidentiality), cybersecurity, privacy, and licensing considerations for existing and emerging technologies.

B **Provide Free or Low-Cost Personalized Consultations:** The WSBA should offer personalized consultations focused on emerging technology, cybersecurity, and ethics, with a particular focus on reaching underserved communities, solos, and small firms.

C **Expand Advanced Programming:** The WSBA should offer content covering specific applications of existing and emerging technologies, offer hands-on training opportunities, and consider expanding certifications to technologies particularly suited to legal practice.

D **Recommend a Technology MCLE Requirement:** The WSBA should consider recommending that the Washington Supreme Court adopt an MCLE requirement focused on cybersecurity and technology competence.

E **Explore Adding Technology and the Law as an Area in the Bar Exam:** Emerging technology has profound implication for every substantive area of law. WSBA should work with area law schools to determine what implications this has for curriculum and how best to include technology competence in the bar exam.

**While 72% of respondents support a technology-focused MCLE requirement, their needs and preferences vary significantly.**

# 4 Building Ethical Frameworks for Technology Use: Supporting Professional Values in a Digital Age

Legal professionals need practical tools to evaluate and ethically implement new technologies, not just updated rules. The ethical implications of technology in legal practice extend far beyond any single tool or application. While only 25% of survey respondents believe current ethical rules adequately cover AI use, the Survey reveals a deeper challenge: practitioners need practical guidance on how to fulfill their professional obligations in an increasingly digital practice environment. This need is most acute among those using technology most extensively—notably, in-house counsel who report the highest AI adoption rates (nearly 70%) also express the least confidence in current ethical guidelines.

The WSBA's Committee on Professional Ethics (CPE) is developing specific guidance on AI use, focusing on core professional obligations including competence,

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confidentiality, supervision, and fees. This important work will help set baseline expectations, and the Task Force strongly supports the developing work in the CPE. However, the Survey and working group findings indicate that practitioners need more than revised Rules of Professional Conduct ('RPCs') or formal rule guidance[12]—they need practical frameworks for evaluating new technologies, implementing appropriate safeguards, and maintaining professional standards while embracing beneficial innovation.[13]

These frameworks must address several key challenges identified by the Task Force. Legal professionals need clear guidelines for protecting client confidentiality when using AI and other cloud-based tools. They need practical standards for supervising technology-assisted work, whether performed by legal professionals, staff, or automated systems. Most importantly, they need help understanding how to maintain their professional judgment and ethical obligations while leveraging technology to serve clients more effectively.[14]

## RECOMMENDATIONS

A **Define Baseline Ethical Standards for Emerging Technologies:** The Board of Governors, through the CPE, and, where applicable, with approval of the Washington Supreme Court, should define baseline ethical standards for emerging technologies. This includes evaluating the sufficiency of existing RPCs, creating due diligence guidelines, and defining the enforceability of such guidance.

B **Publish Clear, Practical Ethics Guidance For Member Questions about Emerging Technologies:** The WSBA should expeditiously create and publish clear, accessible materials, including FAQs and practical content, to help members to quickly identify ethical risks prior to adoption of emerging technologies, including but not limited to confidentiality breaches, bias, inaccuracies, and lack of transparency. These need to be regularly reviewed and updated as technology advances.

C **Create an Ethical Evaluation Framework and Resources for Technology Use:** The WSBA should develop a practical, generalized Ethical Evaluation Framework to help practitioners in systematically assessing new and emerging technologies for compliance with ethical obligations.

# 5 Bridging the Cybersecurity Confidence Gap: From Confidence to Competence

A gap exists between legal professionals' confidence in their cybersecurity practices and their actual implementation. The WSBA must close this gap with standards, tools, and support. The Survey reveals a concerning paradox in how legal professionals approach cybersecurity. While 79% of respondents express confidence in their ability to protect client and organizational data, the actual implementation of basic security measures tells a different story. Only 34% conduct regular security audits, 37% use data

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12. Dennis Kennedy, *Handout from "Ethical Implications of Generative AI for the Michigan Lawyer" Presentation*, Dennis Kennedy Blog (Dec. 14, 2023), https://www.denniskennedy.com/blog/2023/12/handout-from-ethical-implications-of-generative-ai-for-the-michigan-lawyer-presentation/.
13. Jonathan H. Choi, Amy B. Monahan, and Daniel Schwarcz, *Lawyering in the Age of Artificial Intelligence*, Minnesota Law Review (Nov. 30, 2024), https://minnesotalawreview.org/article/lawyering-in-the-age-of-artificial-intelligence/.
14. Keith Robert Fisher, *ABA Ethics Opinion on Generative AI Offers Useful Framework*, American Bar Association (Oct. 3, 2024), https://www.americanbar.org/groups/business_law/resources/business-law-today/2024-october/aba-ethics-opinion-generative-ai-offers-useful-framework/.

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encryption, and even multi-factor authentication —considered a fundamental security practice by experts—is used by just 68% of respondents. This gap between confidence and implementation creates significant risk not just for individual practices, but for the entire legal system's ability to maintain client trust and confidentiality.[15] This is at a time when advances in AI allow more sophisticated methods of targeting confidential information. Legal professionals hold valuable client confidences—consumers are rarely in a position to evaluate data security of legal service providers, and there is limited consumer protection oversight in the area.[16]

The challenge is particularly acute for small firms and solo practitioners. While larger organizations, government agencies, and in-house legal departments generally report somewhat more robust security infrastructures, smaller practices often lack both the resources and expertise to implement basic protections.[17] This disparity isn't just about technology —it reflects fundamental differences in access to IT support, security expertise, and implementation resources. Yet these smaller practices often handle equally sensitive client information, making their security gaps a significant concern for the profession as a whole. This parallels the client-facing concerns raised in key point 9 regarding strengthening consumer protection in the digital era.

Making cybersecurity accessible and practical for all practice settings must be a priority. Legal professionals shouldn't need to become cybersecurity experts, but they do need clear standards, practical implementation tools, and accessible support. This includes basic security checklists, incident response playbooks, and emergency support resources. Many of these tools already exist through the WSBA,[18] the ABA,[19] and other sources, but awareness and adoption remain low. Moving from where we currently are to awareness, understanding, and implementation will take both resources and innovation from the WSBA. The profession needs both better awareness of existing resources and new, practice-specific tools that

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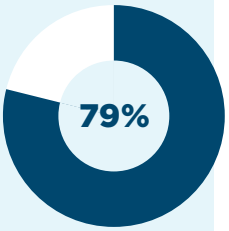
## FAST FINDINGS

### Cybersecurity by the numbers




**79%** of respondents express confidence in their ability to protect client and organizational data.

**34%** conduct regular security audits.

**37%** use data encryption.

**68%** of respondents use multi-factor authentication.

**15.** Sharon D. Nelson, *25% of Law Firms Have Been Breached*, ALPS (Jan. 11, 2022), https://www.alpsinsurance.com/blog/25-of-law-firms-have-been-breached.

**16.** *Formal Opinion 2024-3: Ethical Obligations Relating to a Cybersecurity Incident*, New York City Bar (July 18, 2024), https://www.nycbar.org/reports/formal-opinion-2024-3-ethical-obligations-relating-to-a-cybersecurity-incident/.

**17.** Abigail Peterson, *2024 Solo and Small Firm Tech Report,* American Bar Association (Apr. 21, 2025), www.americanbar.org/groups/law_practice/resources/tech-report/2024/2024-solo-and-small-firm-techreport/.

**18.** *The Law Firm Guide to Cybersecurity*, Washington State Bar Association (Oct. 8, 2021), https://www.wsba.org/for-legal-professionals/member-support/practice-management-assistance/guides/cybersecurity-guide.

**19.** *Cybersecurity Resources for Small Law Firms*, American Bar Association, https://www.americanbar.org/groups/cybersecurity/small-solo-resources/.

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make security implementation straightforward and manageable.

## RECOMMENDATIONS

**A** **Establish Cybersecurity Expectations:** The WSBA should establish clear, and actionable cybersecurity standards for legal professionals, including minimum expectations such as multi-factor authentication, encryption, secure data storage, and regular audits. These standards should build upon existing WSBA cybersecurity resources and be regularly reviewed and updated to address evolving threats and technologies.

**B** **Provide Affordable Cybersecurity Assessments:** The WSBA should collaborate with cybersecurity experts, insurers, and malpractice carriers to provide low-cost, or free, cybersecurity assessments tailored to the needs of solo and small-firm legal practices.

**C** **Expand Cybersecurity Awareness, Training, and Support:** The WSBA should actively promote existing cybersecurity resources, expand those to meet practice specific needs, develop simplified checklists and step-by-step implementation guides tailored for solos and small firms, and deliver targeted, practice-oriented training through webinars, workshops, and on-demand resources.

**D** **Promote Cybersecurity Transparency With Clients:** The WSBA should formally recommend or require legal professionals to explicitly disclose their cybersecurity practices in client engagement letters, thereby strengthening client trust, transparency, and practitioner accountability.

# 6 Strengthening Court Capacity: Advancing Justice Through Digital Transformation

## 6.1 ADAPTING COURTS TO RAPID TECHNOLOGY CHANGE

The rule of law is dependent on ensuing our courts are fully equipped and supported so they can meet the technology changes. Washington's courts must modernize responsibly and equitably, balancing emerging technologies with protections to ensure justice, fairness, and access. The COVID pandemic has demonstrated both the necessity and possibility of remote proceedings, while the emergence of AI tools presents new opportunities and challenges for the administration of justice. The Survey reveals that legal professionals are divided on AI's impact on courts—40% express concerns about efficiency and fairness, while 38% see positive potential. This division underscores the need for a thoughtful, structured approach to court technology evolution.

AI presents both a threat and a major opportunity for closing the justice gap. The Washington Supreme Court's recent Order[20] enabling a Pilot for Entity-Based Regulation is a promising step. The Task Force supports implementation of the Pilot and encourages continued experimentation with technologies and business structures that can improve legal access.

Courts are facing increasingly complex and urgent challenges. As AI-generated evidence and fabricated citations become more common, courts, despite operating with limited resources, must still be equipped to assign accountability and ensure

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**20.** Order Approving the Adoption of a Pilot Project to Teach Entity Regulation, Order No. 25700-B-721 (Wash. Dec. 2024). www.courts.wa.gov/content/publicUpload/Supreme%20Court%20Orders/Order%2025700-B-721.pdf.

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accuracy.[21] They must balance remote access with procedural fairness. They must leverage technology to expand access while maintaining the integrity of judicial processes. The Administrative Office of the Courts (AOC) and local jurisdictions need appropriate staffing and funding to evaluate these tools and support courts in modernizing their technology infrastructure. But beyond resources, courts need adequate education, support. and clear frameworks for managing technology-driven change.[22]

Key priorities identified by the Task Force include providing uniform training and education for court personnel, consistent with education and training recommendations in key point 3 for legal professionals. Updating evidence rules to address AI-generated content, creating authentication standards for digital evidence, and implementing hyperlinked pleadings to help courts verify citations are also key priorities. Equally important is making court forms AI-compatible to support self-represented litigants while reducing the burden on court personnel. The courts must also address language access, with AI translation tools offering potential for routine communications while ensuring constitutional requirements are met for critical proceedings. Finally, the profession would benefit from high level guidance like that recently issued by the Illinois Supreme Court,[23] with a clear, pragmatic approach to AI, permitting its use while holding lawyers and judges accountable for accuracy, ethics, and confidentiality.

**As AI-generated evidence and fabricated citations become more common, courts must still be equipped to assign accountability and ensure accuracy.**

## RECOMMENDATIONS

A **Provide Comprehensive Court Training on AI and Technology:** The Supreme Court and the AOC should establish and fund comprehensive training programs for judges, clerks, and court staff on the responsible use of AI and related courtroom technologies. These programs should include formal certifications and partnerships with trusted technology providers for training support.

B **Upgrade Courtroom Technology:** The WSBA should make it a priority to advocate for statewide funding to equip all Washington trial courts with essential courtroom technology, including reliable broadband access, stationary and movable microphones, audio amplification systems, high-resolution monitors, wall-mounted monitors, and video conferencing software.

C **Update Rules on Electronic Evidence:** The WSBA should work with the Washington Supreme Court to revise court rules governing the introduction of electronic evidence, specifically addressing foundation

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21. *AI-Generated Evidence: A Guide for Judges*, National Center for State Courts, https://www.ncsc.org/resources-courts/ai-generated-evidence-guide-judges.
22. Richard Susskind, *The Future of Courts*, Harvard Law School Center on the Legal Profession (August 2020), clp.law.harvard.edu/knowledge-hub/magazine/issues/remote-courts/the-future-of-courts/.
23. Illinois Supreme Court Policy on Artificial Intelligence (January 1, 2025), https://ilcourtsaudio.blob.core.windows.net/antilles-resources/resources/e43964ab-8874-4b7a-be4e-63af019cb6f7/Illinois%20Supreme%20Court%20AI%20Policy.pdf.

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requirements, authenticity, objections, and concerns related to transparency in algorithms and regarding AI-generated content, such as deepfake images and synthetic audio.

D **Implement AI Detection Tools:** The WSBA should advocate for courts to adopt processes, assisted by standardized tools, to evaluate the legitimacy of citations and legal arguments within motions, briefs, and legal memoranda.

E **Enhance Language Access through AI:** The WSBA should encourage courts to adopt advanced AI translation and transcription technologies to improve court hearings and routine communications, while ensuring compliance with constitutional language access requirements.

F **Simplify Court Forms and Filings:** The WSBA should advocate for, and potentially partner with the courts, to develop AI-powered tools, such as chatbots, to help self-represented litigants complete and fill standardized court forms. AI should be employed to translate these forms into various languages, with accuracy verified by qualified interpreters.

## 6.2 MODERNIZING FRAGMENTED, OUTDATED COURT DATA INFRASTRUCTURE TO IMPROVE EFFICIENCY AND ACCESS

Washington's courts operate on outdated and fragmented digital systems, which hinder transparency and public access, delay justice, and prevent cross-jurisdictional innovation. Washington courts currently operate without a unified digital system. Calendaring tools, case management systems, and e-filing platforms differ widely due to funding structures and jurisdiction—specific needs, and current local systems rely heavily on fragmented, decades-old technologies.[24] While the courts' flagship program Odyssey brings some commonality to data infrastructure, it is far from complete.

To realize the benefits of emerging technologies— and to avoid falling further behind—Washington's courts need consistent and compatible e-filing systems statewide. Their back-end systems must be able to share and analyze data across jurisdictions, enabling the use of AI tools to improve transparency. access, equity, and efficiency. This should be done in a way that cost barriers are removed or minimized for access to court records.

Achieving this will require significant state investment in new technology, particularly in rural and underfunded jurisdictions, as well as restructuring of data "ownership" models. It also involves addressing the inherent political tensions among the judiciary, legislative bodies, county governments including court clerks, and the broader public surrounding court records and data ownership. A modern statewide court data infrastructure, and resolution of the political question of data ownership, would reduce administrative burdens, improve transparency, and help jump start modern innovations such as AI-driven legal assistance, user-friendly digital services, and more equitable public access. Building this infrastructure will require long-term state funding and close coordination across stakeholders at all levels of government.

Without a fully unified digital system, courts face persistent inefficiencies, burdensome manual

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**24.** Moe K. Clark, *'It's an uphill battle': Decades-Long Effort to Unify Washington's Court System Again Falls Short*, InvestigateWest (March 20, 2025), https://www.investigatewest.org/investigatewest-reports/its-an-uphill-battle-decades-long-effort-to-unify-washingtons-court-system-again-falls-short-17840352.

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processes, and critical data gaps. These issues are consistently reported by legal practitioners across the state, including in the Survey, and fall especially hard on self-represented litigants and rural communities.

**RECOMMENDATION**

**A** **Advocate for Standardized, Statewide Court Data Infrastructure Fully Funded by the State:** The WSBA should strongly advocate for a standardized, modern statewide court data infrastructure fully funded by the State and designed to support integration, efficiency, and equitable access to justice.

## 7 Supporting Future Professionals: Transforming Legal Education for the Digital Era

To prepare students for modern legal practice, Washington's law schools must comprehensively integrate technology into curriculum, training, and culture, not as an add-on, but as a core component of legal education. The rapid evolution of technology is reshaping legal practice at every level, demanding fundamental shifts in legal education. To meet these demands, Washington's law schools must move beyond incremental updates to the curriculum and embrace comprehensive, transformative integration of technology and innovation. The next generation of legal professionals will enter a profession already deeply shaped by generative AI, advanced data analytics, cybersecurity demands, and digital innovation.[25] Traditional legal education models, emphasizing theory without adequate practical technological integration, no longer adequately prepare students for practice.

Law schools must comprehensively embed technology across curricula and educational experiences, building not just awareness, but deep technological proficiency.

Law schools must comprehensively embed technology across curricula and educational experiences, building not just awareness, but deep technological proficiency.[26] This includes providing hands-on experiences, real-world practical clinics, and explicit pathways toward technology-driven careers.[27] Crucially, these efforts must also include significant investments in faculty skills and confidence in emerging technologies, ensuring educators can effectively guide and inspire future lawyers. By fostering a culture of innovation, curiosity, and ethical technology use, Washington law schools play a pivotal role in equipping new lawyers not only to navigate technological change, but to become its responsible leaders.

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**25.** Anthony Davis, *The Future of Law Firms (and Lawyers) in the Age of Artificial Intelligence*, American Bar Association (Oct. 2, 2020), www.americanbar.org/groups/professional_responsibility/publications/professional_lawyer/27/1/the-future-law-firms-and-lawyers-the-age-artificial-intelligence/.

**26.** Raymond H. Brescia, *Teaching to the Tech: Law Schools and the Duty of Technology Competence*, Vol. 62 62 Washburn Law Journal p.507-540, (2023).

**27.** *CODEX*, Stanford Law School, https://law.stanford.edu/codex-the-stanford-center-for-legal-informatics/ (last visited July 8, 2025).

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## RECOMMENDATIONS

A **Embrace a Technology Conscious Culture:** Washington law schools should foster a culture in which faculty, staff, and students are supported in navigating the challenges and opportunities presented by new technologies in legal education and in the rapidly changing legal services landscape.

B **Maintain a Practice-Ready Curriculum:** Washington law schools should ensure that impactful technologies are addressed in courses focusing on technology skills (e.g. document automation, contract review, and data analysis) and processes (e.g. e-discovery, digital evidence, and cybersecurity), as well as in traditional and core courses (e.g. professional responsibility and civil procedure), through independent study opportunities (e.g. online tutorials, webinars, technology-focused directed research), and in clinics and externships that allow experiential opportunities with technology in different settings.

C **Assess Student Progress:** Washington law schools should establish a requirement that students demonstrate technology competence before graduating, such as by completing certain technology-focused course work, by completing technology-focused projects, or through a reputable technology certification program. Schools should regularly assess student progress and identify areas needing additional training or support.

D **Ensure Post-Graduation Success:** The WSBA and Washington law schools should establish a mentorship program that pairs students with practitioners who are experienced in using technology in their law practice. They should also promote a career path focused on technology and law by providing students with guidance on how to pursue a career in this area.

E **Support Faculty:** Washington law schools should encourage faculty to develop their own technology skills and support them through regular training on software, hardware, and online platforms commonly used in legal services, so they can effectively teach and mentor students.

F **Influence Broader Law and Policy Development:** Washington law schools should support faculty scholarship and research related to technology, hold continuing legal education courses on technology, and maintain an institute or center that focuses on the intersection of law and technology to provide a hub for research, education, and innovation.

## 8 Advancing Ethical Innovation and Equitable Access: Leveraging AI to Close the Justice Gap

The public is increasingly turning to AI-driven tools for legal help, without attorney involvement, creating an urgent need for ethical standards, public education, and innovative delivery models that expand access to justice without compromising consumer protections A recent LexisNexis survey[28] found that 27% of consumers have used generative AI to answer legal questions on their own, a figure that closely parallels the 25% of legal professionals using generative AI in their practice, according to the Survey. This data underscores a critical shift: the public is turning to AI

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**28.** *Generative AI & the Legal Profession*, Lexis Nexis (April 2023), https://www.lexisnexis.com/pdf/ln_generative_ai_report.pdf.

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for legal help, often without the benefit of attorney oversight or guidance.

These tools present both an opportunity and risk. On one hand, AI-powered tools offer meaningful opportunities to expand access to justice by reducing costs, improving legal literacy,[29] and simplifying routine legal tasks for self-represented litigants[30] and communities.[31] On the other hand, these tools also pose serious risks if left unchecked. Without thoughtful regulation and professional engagement, they risk spreading misinformation, violating unauthorized practice of law (UPL) rules, and impacting the quality of legal guidance the public receives.

The WSBA, courts, and legal professionals must embrace their role in shaping the future of ethical legal technology by ensuring that AI-driven legal assistance supports, rather than undermines, meaningful access to justice. This means proactive investment in innovation, formation of strategic partnerships, and ensuring equitable technology access. The Washington Supreme Court's recent authorization of a regulatory pilot program for new business structures and entity-based regulation represents an essential step toward responsible innovation and enhanced access to legal services.[32]

Rather than viewing AI as a risk to legal service delivery, the profession should lead efforts to integrate these tools responsibly— developing standards, clarifying UPL boundaries, and creating AI applications that are accurate, ethical, and designed with public interest and trust in mind. Legal professionals are not only protectors of justice; they are also critical stakeholders in building a more inclusive and technologically responsive legal system.

## RECOMMENDATIONS

A **Establish Ethical Boundaries for AI Legal Tools:** The WSBA, in collaboration with the Washington Supreme Court, should establish clear guidelines distinguishing appropriate from unauthorized or misleading uses of AI-generated legal advice to protect consumers from misleading or inaccurate information, reduce bias, and protect fundamental rights. Legal technology providers should be required to ensure transparency in how their systems function and to be accountable for their outputs.

B **Expand Court-Based AI Resources:** The WSBA should advocate that Washington courts invest in practical, user-centered AI tools, such as multilingual self-help portals and simplified online forms, to expand meaningful legal access for underserved communities.

C **Support Public-Facing AI Literacy:** The WSBA and Washington Courts should jointly develop public education materials to enhance consumer understanding of AI-based legal tools, empowering the public to use AI responsibly and with confidence.

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**29.** Drew Simshaw, *Access to A.I. Justice: Avoiding an Inequitable Two-Tiered System of Legal Services*, Vol. 24 Yale Journal of Law and Technology p.150-226, (2022).

**30.** Christopher L. Griffin, Jr., Cas Laskowski, and Samuel A. Thumma, *How to Harness AI for Justice*, Judicature International (July 23, 2024), https://judicature.duke.edu/articles/how-to-harness-ai-for-justice/.

**31.** Nicole Black, *Access to Justice 2.0: How AI-Powered Software Can Bridge the Gap*, ABA Journal (Jan. 24, 2025, 10:20am), https://www.abajournal.com/columns/article/access-to-justice-20-how-ai-powered-software-can-bridge-the-gap.

**32.** Order Approving the Adoption of a Pilot Project to Teach Entity Regulation, Order No. 25700-B-721 (Wash. Dec. 2024). www.courts.wa.gov/content/publicUpload/Supreme%20Court%20Orders/Order%2025700-B-721.pdf.

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**D** **Educate Legal Professionals on Inclusive AI Implementation:** The WSBA should partner with law schools and MCLE providers to offer targeted programs to equip legal practitioners to ethically use AI tools that genuinely benefit and are designed to serve underserved communities.

**E** **Foster Development of Affordable and Scalable Tools:** The WSBA should explore and promote funding mechanisms that expand the development of affordable, user-friendly technologies for small legal practices, public interest service providers, and individuals with limited resources.

## 9 Safeguarding Sensitive Legal Data: Strengthening Consumer Protection in a Digital Era

Legal professionals have a responsibility to protect sensitive legal data from misuse in a rapidly evolving digital landscape. They also are on the front lines where their clients suffer or face the rising misuse of technology. As legal information becomes increasingly commodified by AI tools and online platforms, stronger consumer protections, clearer regulations, and lawyer-led advocacy are urgently needed. Integrating AI into governance, constitutional systems, and judicial processes raises urgent questions about protecting consumer data from misuse, manipulation, or unauthorized access. It also requires the WSBA to be an active participant in updating key consumer protection laws.

Consumers are increasingly turning to online platforms for help with deeply legal issues—like health issues, financial challenges, immigration, or domestic violence—without realizing how their data may be tracked, shared, or sold.[33] If not thoughtfully managed, these advancements risk undermining the rule of law and democratic principles by exposing users to risks ranging from surveillance to fraud, to behavioral advertising to the commodification of legal needs. For example, when an individual visits an immigration law website, uses a chatbot that provides landlord tenant guidance, or installs an app that provides legal services for victims of domestic violence, hundreds of businesses may track and monetize that person's personal information, often including their location. The chatbot operator, for example, could sell the unique online identifiers or even the queries of its users to online advertising platforms who can use the personal information to target digital ads or to third party data aggregates. Increased default settings on apps allow sales of the information, including nature of inquiries and geolocation. Others allow cross-app tracking so information from a device is shared more broadly.

This risk also exists even earlier in the process: consumers who search for 'legal advice' in the app store on their phones can choose among hundreds of legal services apps available today—let alone understand what tracking or sharing of information is permitted by default under the app's terms of service? The Task Force believes the WSBA is well positioned to develop materials to help consumers evaluate such offerings, partner with other bars to develop a standard 'seal' to identify legal services websites and apps meeting certain criteria, and provide a mechanism for consumers to ask questions about such apps, and where, if appropriate, to report the

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**33.** Michelle Egbert, Comment, *Access to Freedom: Can Technology Improve Access to Justice for Survivors of Domestic Abuse?*, Vol. 36 Journal of the American Academy of Matrimonial Lawyers p.187-207, (2023). www.aaml.org/wp-content/uploads/7-MAT105.pdf.

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unauthorized practice of law.

According to the Survey, 68% of legal professionals believe existing consumer protections for AI are inadequate. Nearly 60% support the creation of AI-specific privacy protections, and over 50% favor measures requiring companies to disclose how consumer data is used and giving individuals the right to correct or delete data utilized by AI models. Without robust safeguards and oversight, AI-driven decision-making—whether in the private or public sector—can silently erode personal privacy and civil rights, especially when used to make decisions that have significant legal or similarly significant effects, such as benefits and housing eligibility or criminal justice outcomes.[34] These concerns are not theoretical: they implicate fundamental values like personal safety, due process, dignity, and equal treatment under the law.

To safeguard access to and the administration of justice, Washingtonians need greater privacy rights. In implementing groundbreaking protections for consumer health data in 2023 by enacting the Washington My Health My Data Act, the legislature found:

> ***"The people of Washington regard their privacy as a fundamental right and an essential element of their individual freedom. Washington's Constitution explicitly provides the right to privacy. Fundamental privacy rights have long been and continue to be integral to protecting Washingtonians and to safeguarding our democratic republic."***

Yet current protections focus primarily on health data. Legal data is similarly sensitive, directly linked to an individual's safety, freedom, and dignity. For instance, seeking information on protective orders or criminal defense services reveals deeply sensitive circumstances. Currently, Washingtonians' legal data lacks robust protections against behavioral profiling and targeted advertising. The WSBA should advocate for limitations on the use of consumers' legal data, as well as more comprehensive privacy rights.

AI and predictive analytics, fueled by vast amounts of seemingly routine data, can reveal highly sensitive personal information—including personality traits, health conditions and biometrics, political preferences, or purported intelligence levels derived from social media activity—potentially undermining privacy and dignity.

Washingtonians should have comprehensive privacy rights, including the right to know what information organizations collect, how it is used and a way to correct or challenge such data or information. They should also have the right to opt-out of automated decision making, particularly when their livelihoods are at stake. Additionally, organizations should have greater obligations when it comes to processing personal information, including an obligation to practice data minimization and to provide consumers with meaningful choice related to certain uses of information.

Washington's Rules of Professional Conduct explicitly charge lawyers with ensuring justice, fairness, and transparency amid technological change. Lawyers must therefore advocate for legislative improvements, adopt stronger internal data protections, and ensure their technology partners align with professional

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**34.** Olga Akselrod, *How Artificial Intelligence Can Deepen Racial and Economic Inequities*, American Civil Liberties Union (July 13, 2021), www.aclu.org/news/privacy-technology/how-artificial-intelligence-can-deepen-racial-and-economic-inequities.

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responsibility standards. By critically assessing AI's application in governance and consumer spaces and advocating for its alignment with ethical and constitutional principles, legal professionals can play a key role as essential guardians of the rule of law in a time of rapid technological and societal change. *Scope of WSBA Advocacy—The Task Force recognizes that WSBA's ability to advocate on public policy issues is limited by the Keller rule, which restricts activities funded by mandatory dues to matters directly related to regulating the legal profession or improving the quality of legal services. The Task Force identifies these issues as significant for Washington consumers and encourages legislative and policy consideration, while recommending WSBA advocacy only within the bounds of these permissible activities.*[35]

## RECOMMENDATIONS

A **Advocate for Updated Consumer Protection Laws:** The WSBA should advocate, consistent with Keller limitations, for regular updates to state consumer protection laws and regulations that provide meaningful protections and address abuses enabled by AI and other digital technologies.

B **Advocate for Enhanced Consumer Privacy Protections:** The WSBA should advocate, within Keller limitations, for expanded privacy protections for sensitive information, including restrictions on the collection, use, and sale of personal data by legal technology providers.

C **Provide Title 7 RPC Guidance on Lawyer Advertising and Marketing:** The WSBA should update RPC Title 7 rules on advertising to clearly prohibit the sale or sharing of sensitive personal data collected by legal websites and applications.

D **Develop Consumer-Focused Certification Programs:** The WSBA should develop a consumer-facing certification program or standardized "seal" to help the public identify trustworthy legal-service websites and apps, and to enable consumers to report entities operating without authorization to practice law.

E **Provide Education on AI and Consumer Protection:** The WSBA should provide ongoing education to legal professionals on evolving AI-related consumer protection issues, laws, and regulations, explicitly covering algorithmic bias, data privacy, and remedies available to consumers impacted by automated decision-making.

# 10 Ensuring Regulatory Innovation and Stability: Future Expertise and Oversight

Rapidly evolving legal technologies—especially AI, automation, and virtual platforms—pose profound challenges and opportunities to traditional regulatory frameworks, underscoring the urgent need for dedicated oversight. Addressing these effectively requires ongoing, expert oversight. The recommendations in this report highlight the need for a stable, empowered body to provide review, expertise, oversight, and guidance into the future. The consensus within the Task Force is that new technologies—whether targeted to consumer legal services (for example an online service the provides legal advice for a divorce or estate planning) or simply horizontal platforms used by consumers to solve legal

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**35.** Wash. Rules of Pro. Conduct Pmbl. and scope (2021), https://www.courts.wa.gov/court_rules/pdf/RPC/GA_RPC_PREAMBLEANDSCOPE.pdf

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issues (using generalized services like ChatGPT)—will strain existing UPL frameworks, ethical frameworks, court capability, and enforcement capacity. The establishment of a Washington Supreme Court Board to address these issues would assure accountability and continuity. Without an institutional successor to the Task Force, the oversight of critical regulatory concerns surrounding the ever-evolving landscape of legal technology would be left to chance.

A Supreme Court-affiliated Board would provide authoritative guidance and continuity, effectively bridging court rulemaking, regulatory reform, and bar governance to ensure responsible innovation. The Washington Supreme Court's Practice of Law Board (POLB) has demonstrated capacity to work through complex regulatory issues and could be a suitable home for this work. However, this would require expanding its charter under GR 25 to explicitly include technology-related oversight and regulatory innovation and ensuring it had the requisite technological expertise and support.

Advocating for the Washington Supreme Court to create this Board—or for expanding scope of the POLB—aligns directly with WSBA's strategic priorities, including championing justice, fostering inclusion, and supporting professional excellence, and reflects broader national trends of proactive judicial and bar association leadership in regulatory innovation.

Establishing such a Board would proactively position Washington as a national leader, balancing technological innovation with robust consumer protection and regulatory clarity.

## RECOMMENDATION

**A** **Petition for a Dedicated Technology Oversight Board or Expanded Practice of Law Board**

**Mandate:** The WSBA should petition the Washington Supreme Court to establish a Board for Legal Technology and Regulatory Innovation or broaden the scope of the Practice of Law Board with the following mission/goals:

- To collaborate with the WSBA, the Supreme Court, and other relevant stakeholders to develop rules, education, and policies supporting responsible regulatory reform and innovation.
- To ensure the profession and court system is equipped to continue to ensure the just and fair rule of law.
- To ensure that all legal technology innovations align with the legal profession's core values—integrity, public service, and administration of justice.

WASHINGTON STATE
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# Looking Forward

These ten key points focus less on narrow practices and more on capacity building, ethics, and education for a reason. The technology interface with law is rapidly evolving, and it is far too important to be stuffed into a static set of recommendations and left in a drawer.

## A NOTE FROM THE TASK FORCE

In developing this report, the Task Force drafters worked iteratively with advancing versions of three main generative AI tools:

- ChatGPT (from OpenAI),
- Claude (from Anthropic), and
- CoPilot (from Microsoft).

In addition, the Task Force drafters benefited from help from Clearbrief (from Clearbrief.ai) in structuring and writing references. The Task Force members used these systems as a collaborative tool to support—rather than replace—the core work of legal analysis, strategic framing, and writing. The drafters provided subject-matter expertise, policy direction, legal analysis, editorial judgment, and extensive human-based research, while the generative AI tools served as responsive assistants—generating initial drafts, offering structural suggestions, surfacing alternative phrasings, and helping identify gaps or ambiguities. At every stage, decisions about content, tone, and framing remained firmly in human hands, and all information generated by the AI tools was reviewed for accuracy by Task Force members. This process reflects the approach the Task Force recommends for legal professionals: thoughtful, professional-led use of AI that enhances human capability without displacing professional responsibility, creativity, or control.

The WSBA, the courts, and the profession will need to develop new abilities to handle technology changes and harmonize them with one of the most human processes in society—the way we deliver legal services to people across the state. As officers of the Court, we have the obligation not just to individual clients but to the system of justice and rule of law.

Lawyering is not just a learned profession, but a learning profession. We will find ways to learn, adapt, and excel in this changing environment. But doing so demands we are informed, intentional, and forward-looking about how technologies and the profession will dovetail to create improved results for Washingtonians—and that we leave no one behind. As the legal profession navigates technological change, we must recognize our unique role in shaping how these tools impact society. Legal professionals have a special responsibility to safeguard justice and ensure legal systems remain fair, transparent, and accountable. This means staying informed about and engaged with broader societal concerns—from environmental impact to algorithmic bias, from privacy protection to access. While AI will inevitably transform how legal work happens, our fundamental obligation is to ensure it does so in ways that strengthen rather than undermine the rule of law. By being deliberate in understanding how these technologies interact with societal values and institutional structures, we can help ensure they enhance rather than diminish access to justice and the quality of legal services for all.

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APRIL 2025

# WSBA Technology Survey Report: Preliminary Findings

This memo summarizes key findings from the WSBA Legal Technology Survey, providing an overview of the WSBA Legal Technology Task Force's (Task Force) analysis and next steps.

## INTRODUCTION

We have also included in these findings the **Final WSBA Technology Survey Report**, an overview report by National Business Research Institute (NBRI), the vendor that ran the survey (the NBRI Report), together with a slide deck called "WSBA Tech Task Force Member Survey — results overview," containing additional analysis performed by the Task Force. The Survey was prepared by the Task Force with support from WSBA staff and NBRI, and administered by NBRI from September 30-October 23, 2024. The survey received responses from 516 members (5% response rate), yielding a 98% confidence level with a 5% margin of error. For additional methodology and demographic information from the survey, please see the NBRI Report.

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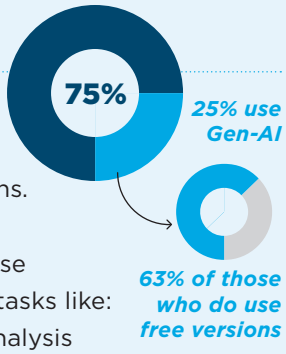
## FAST FINDINGS

### Current AI Usage




**75%** of WSBA members do not currently use Generative AI applications.

Of those who do, **63%** use free public versions for tasks like:

- Legal research and analysis
- Drafting and summarizing documents

The members surveyed prioritize legal research for technology improvements.

### Ethics, Knowledge & Training Needs

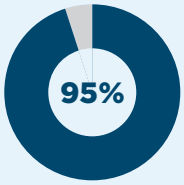
Members' self-assessed Gen-AI knowledge: **36%** rate as "Fair," **28%** as "Poor." Only **9%** rate themselves as "Good" or Better."

Members prefer CLEs and hands-on workshops to learn new technologies. **72%** support adding an MCLE requirement for technology.

A majority (**69%**) believe Generative AI will require additional training and skills.

Only **23%** of members believe ethical rules adequately cover the use of Gen-AI.

### Courts, Court Rules & Procedures




**95%** of WSBA members have not encountered AI-related issues in their cases and 97% are not practicing in courts with specific AI rules. Members expressed interest in clearer guidelines for AI use in legal contexts.

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## PURPOSE

The WSBA Board of Governors established the Task Force under one of WSBA's FY2023-2024 strategic priorities to "Assess technology-related opportunities and threats and determine WSBA's role vis-a-vis regulation, consumer protection, and support to legal professionals."

**The Task Force is specifically tasked to:**

- **assess the legal technology landscape, identifying threats and opportunities across various legal sectors, and**
- **make recommendations that support and strengthen the understanding and use of technology in members' practice, emphasizing effective, efficient, and ethical use of technology that enhances equitable access to justice.**

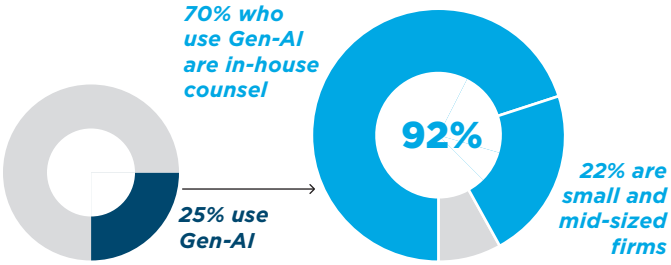
The Charter calls for identifying practical ways to integrate technology into legal services while supporting professionals across all practice settings. The initiative is not a review of technology for its own sake: at this critical point in technology development and growing legal needs, WSBA's strategic objectives aim to advance capabilities, quality, and availability for both legal professionals and those they serve.

As part of this mission, the Task Force developed a survey to evaluate how WSBA members are currently engaging with technology. Recognizing that technology adoption is becoming widespread in society, the survey aimed to assess WSBA members' use and awareness of technology, and how best to support them in the use of technology that benefits both them and the public they serve.

## KEY SURVEY FINDINGS

The WSBA Technology Survey offers valuable data on how legal professionals in Washington State are engaging with technology, and the challenges and opportunities they face.

**Highlights from the findings include:**




### Use of Artificial Intelligence (AI) within legal practice

**AI usage remains limited, with only 25% of respondents reporting use on a regular basis. However, there are substantial differences between practice settings: for example usage is far higher among in-house counsel (70%) compared to small and mid-sized firms (22%).**

- Early adopters cited improved efficiency, particularly in legal research and document drafting and summarization.
- Non-users expressed concerns about fundamental trust issues: accuracy, ethical implications, and data security. Some non-users also noted that they did not see a relevant use case for AI or believe it would add value to their work. In addition, some noted concerns about AI diminishing the value of legal expertise. Sentiment analysis of verbatim comments also indicates that some have a reluctance or skepticism regarding new technologies, possibly related to concerns about trust, security, and efficacy of these tools in a legal setting. Several indicated they had made

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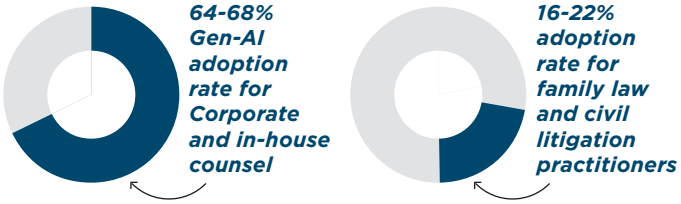
unsuccessful early attempts to use generative AI, informing their views on its utility.

- Of those who are using Generative AI applications, **63%** are using free public versions for tasks such as (a) legal research and analysis and (b) drafting and summarizing documents. Some respondents also found high utility in other uses such as training, risk assessment, and strategy development, in addition to more mundane tasks.
- Looking forward, members interested in using AI prioritized legal research as an area for technology improvement in their practice.
- Most respondents **(69%)** believe use of AI in the legal practice will require additional training and skills. Only about **26%** of respondents indicated their current knowledge of how to use AI was at least "good" — over **60%** indicated their knowledge was "fair" or "poor".
- Members prefer CLEs and hands-on workshops to learn new technologies. A substantial majority **(72%)** support adding an MCLE requirement for technology. A significant portion of members **(45%)** also favored WSBA support in the form of technology due diligence guidelines, checklists, and repositories of legal technology tools and resources.
- Only **25%** of members believe ethical rules adequately cover the use of Generative AI. Notably, the groups that use AI most in practice (in house) are least confident, by a modest margin, in current ethical rules and guidelines for legal professionals.




## Practice Area Disparities in Technology Adoption

**AI adoption and confidence varies substantially across practice areas. Corporate and in-house counsel show higher adoption rates (64-68%) compared to family law and civil litigation practitioners (16-22%).**

- Self-reported knowledge gaps follow similar patterns: corporate and contracts practitioners rate their AI knowledge higher compared to civil litigation practitioners.
- These disparities extend to cybersecurity implementation, with smaller practices and specific practice areas showing lower adoption rates of essential security measures.

## Cybersecurity Practices

**Responses gave a mixed signal on cybersecurity. A substantial majority of members (79%) express confidence in their organization's ability to protect the organization and client data from cybersecurity threats.**

- Despite high confidence levels among respondents, significant gaps remain in critical cybersecurity

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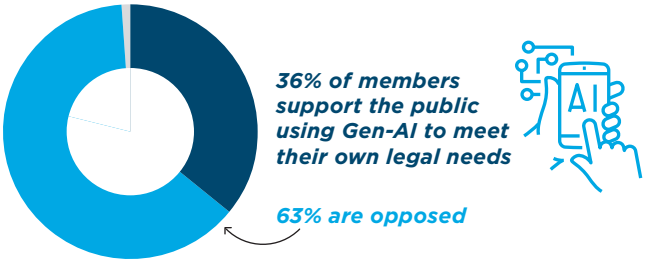
best practices (identified by NIST, CISA, ABA, and WSBA), indicated by lower rates of their use, including regular audits **(34%)** and data encryption **(37%)**. While multi-factor authentication (MFA) scored higher at **68%**, given the critical importance of this practice the response is concerning – see materials through the U.S. Cybersecurity & Infrastructure Security Agency (CISA), Federal Trade Commission (FTC), National Institute of Standards and Technology (NIST), American Bar Association, and WSBA's Law Firm Guide to Cybersecurity.

- Survey data reveals practice-specific variations in security measure implementation, with civil litigation and family law practices showing notably lower adoption rates of basic security tools compared to corporate and larger firms. Larger firms, government, and in-house practitioners had higher levels of cybersecurity infrastructure in place, compared to solo and small firms.
- The confidence-implementation gap is particularly pronounced in smaller practices and specific practice areas like family law, where actual implementation of common security measures is significantly lower than reported confidence levels.
- It is possible that some of these gaps are in reality smaller than indicated because respondents are unaware of cybersecurity technologies already included in their IT environment. Nonetheless the existence of the gaps and the relatively low reported usage rates of basic, recommended cybersecurity practices signals an area for focus, particularly in light of the important data practitioners receive from clients, and the trust placed in legal professionals to safeguard that data.

## Non-AI Legal Technologies

**Tools such as practice management systems, forms automation, and e-discovery platforms are underutilized, particularly in smaller and rural practices. Barriers include cost, lack of training, limited awareness, and a perception of low rate of return on investment.**




## Access to Justice

**Members were slightly more positive (36%) in their support of the public using generative AI to meet their own legal needs (e.g., self-representative litigants) than the rate at which members themselves have adopted generative AI in their practices (25%), but those opposed (63%) held very strong views.**

- Those supporting public use to meet their own legal needs said AI can help bridge the gap for individuals who cannot afford legal services, and that AI can serve as a cost-effective and highly available option, especially in rural or otherwise underserved areas, delivering legal services to those who would otherwise have no help.
- Those opposed echoed the same concerns cited by those concerned about use of generative AI directly in the legal profession: accuracy, reliability, and lack of ethical guidance or standards. In addition, they noted that the general public lacks the foundational legal knowledge to understand AI-generated information properly, what questions to ask, how to fact-check

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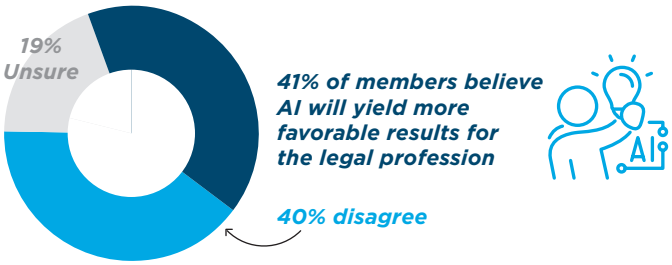
AI responses, or how to apply the information.

- Slightly more members supported the view that AI will yield more favorable results in narrowing the access to justice gap **(41%)** than those who disagreed **(38%)**. Responses of "unsure" were **18%**.




## Impact on Legal Profession

**Respondents generally have a favorable view of technology-driven changes in the legal profession, but opinions are divided on the impact of generative AI on the court system and the legal profession.**

- Respondents had a generally favorable view about technology-driven change, with **55%** supporting the view that those changes will improve the experience of being a lawyer in Washington compared to the last two decades, **25%** not supporting the view, and **18%** unsure.
- At the same time, views were more divided about specific impacts of generative AI. A significant plurality **(about 40%)** disagreed with the statement "Generative AI will have a positive impact on the court system, both in terms of efficiency and fairness," with **38%** supporting the statement and **20%** unsure. Similarly, **41%** of respondents supported the statement that "Overall, I believe AI will yield more favorable results for the legal profession." About **40%** disagreed with the statement and **19%** were unsure.

The Final WSBA Technology Survey Report provides a full breakdown of the data, including visuals, demographic trends, and quantitative insights.

## ANALYSIS AND KEY TAKEAWAYS

Building on the survey findings, the WSBA Technology Task Force has conducted an initial analysis, identifying areas where deeper consideration is needed:

1. **Technology understanding is a necessity — technology is not an end in itself.** Restating a key theme for the Task Force — the Task Force is not evaluating technology for its own sake, nor does the Task Force believe that any specific level, type, or application of technology adoption is necessary for all practice members. At the same time, as these technologies become increasingly ubiquitous in society, they are also critically important to understand, both as a part of what happens in our world as the subject of legal issues, disputes, contracts, and harms, and as a part of the toolkit that may be necessary to serve clients effectively. Generative AI is rapidly becoming both a tool for enhancing legal practice and an essential competence for legal professionals in this rapidly changing world. Understanding and usage of such technology could soon become a requirement for legal professionals to discharge a variety of ethical obligations to clients.

2. **WSBA members represent significant diversity in practice types, needs, and technology usage.** Survey responses reflect the varied nature of legal practices across Washington, from large in-house counsel teams to solo practitioners and rural firms. This diversity leads to widely differing technology requirements. For instance, while some members benefit from robust AI and data analytics tools, others prioritize basic practice management systems.

   The survey breakout data reveals that these differences are particularly pronounced between practice areas. While corporate and in-house counsel show higher technology adoption rates and confidence

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levels, civil litigation and family law practitioners consistently report lower adoption rates, knowledge levels, and implementation of security measures.

The survey supports the need for tailored approaches to technology resources and training. WSBA's technology support strategy needs to take into account differences in capabilities, supporting a spectrum of experiences, practice area, firm size, and geographic location.

3 **Diverse Needs Require Diverse Solutions.** The diversity of practices also means there is no universal "right" technology. Survey comments suggest that smaller firms and rural practitioners require simpler, cost-effective solutions, while larger organizations may demand sophisticated, scalable, or even bespoke platforms. This diversity underscores the importance of offering scalable and adaptable technology resources, consumable in different ways. It also means that driving awareness across the entire membership, not just part of it, will be an important part of next steps.

4 **Resources should include ready access and availability to small firms, rural practices, and solo practitioners.** Smaller and rural practices face significant barriers, including financial constraints, limited access to training, and resource gaps. These disparities were consistently highlighted in the survey as critical obstacles to technology adoption. Supporting these members will require targeted, affordable solutions that address their unique challenges.

5 **Members called out an interest in awareness and capabilities.** Survey responses centered on training and resources suggest that the biggest investment for WSBA should not be in technology itself but in the skills, awareness, and capabilities of its members. Practical training programs, clear guidelines, and accessible resources will support members as they navigate technological changes. Respondents emphasized the importance of practical, hands-on training opportunities, including CLEs, peer-led workshops, and tools tailored to their specific needs. A significant majority of respondents said they support a technology-related MCLE requirement.

6 **Bridging gaps will help with awareness and competence at key technology skills for legal professionals.** Understanding of AI remains limited among many segments of members, limiting use of potentially helpful tools. Many respondents, particularly those in small firms, indicated they are overwhelmed by day-to-day practice demands and lack the time and in-house support to explore and implement new tools. This highlights the need for targeted education and support to make AI and other technology adoption feasible and relevant.

7 **Trust is fundamental, especially in the legal profession.** Many respondents articulated fears about generative AI replacing lawyers entirely, overshadowing its potential as a tool to support and augment legal work. Respondents expressed a lack of understanding about effective use cases for generative AI, both within their practices and for potential use by the public to meet their own legal needs. Addressing fears of both members and the public and demonstrating valuable uses will be critical to help legal professionals gain improvements and efficiencies from these tools.

8 **Generative AI has a dual role for legal professionals — both as a tool in the practice and as an essential area in the subject matter of daily lives, and hence, the practice of law.** Generative AI is increasingly becoming part of daily life in business, in government, and in society. Its implications for the legal profession extend far

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beyond direct legal applications of technology. Even for those not using generative AI in their practice, understanding its operations and its role is critical for issues like evidence authentication, procedural rules, and overall professional competence. Note for example proposed new federal rules of evidence addressing AI, deepfakes, and machine generated evidence and a recent Florida state case allowing a virtual reality simulation of a crime scene reconstruction into evidence — with the judge viewing the scene through VR goggles. As technology evolves, basic fluency in AI will be a fundamental skill for legal representation.

**9** **Many members are not confident the current Rules of Professional Conduct effectively address AI technologies, and are unsure they know how to spot and resolve ethical considerations in the use of generative AI.** Respondents frequently voiced concerns about ethical challenges, particularly around data privacy and client confidentiality. Many emphasized the need for clear, WSBA-led guidelines, checklists, and potentially even approved technologies to ensure AI tools are used responsibly and in compliance with ethical obligations under the Rules of Professional Conduct.

**10** **Improved Cybersecurity readiness is both urgent and important.** A significant gap exists between members' confidence in their cybersecurity practices and the reality of their implementation. Many respondents lack foundational measures like multi-factor authentication and regular security audits. Solo practitioners and smaller firms are especially vulnerable due to resource limitations. The survey underscores the need for practical cybersecurity tools and education tailored to these groups. They also point to limited awareness of tools already available from WSBA, the ABA, and other resources.

**11** **Using technology tools to improve access to justice requires developing public trust in the technology.** For technology to improve access to justice, it must earn the trust of the public, WSBA members, and the Courts. This is true whether the technology user is a legal professional or someone in the general public accessing legal information. Survey responses emphasized the importance of transparency, reliability, and ethical use of technology to avoid misuse or over-reliance. Public-facing legal tools must be rigorously tested and clearly communicated to build confidence among users, and to ensure consumer protection.

**12** **WSBA members will need more assistance and support as additional tools and capabilities come on line — WSBA will need to develop robust, sustained capabilities to support members with these changes.** The technology environment continues to change. The needs expressed in the survey indicate training and support for members are not a "one and done" experience. WSBA will need to adapt to these needs, which are likely beyond current resourcing levels.

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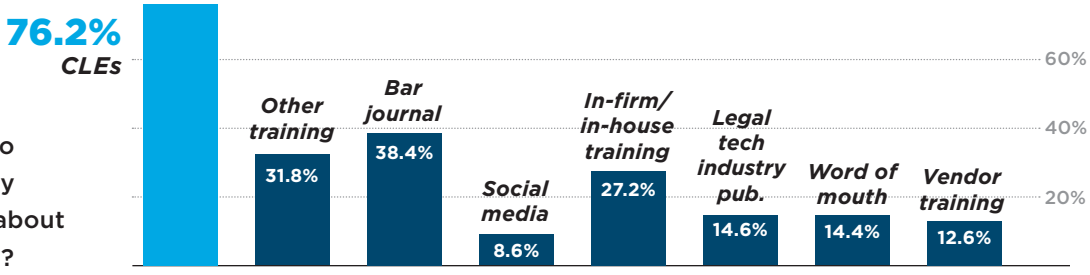
**Survey question**

**How would you prefer to keep up with technology developments to learn about the benefits and risks ...?**



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## COMPARISON TO OTHER SURVEYS

The results from the WSBA Legal Technology Task Force Survey are generally in line with other recent technology surveys, both in the US and internationally, highlighting similar patterns in technology adoption (and costs/benefits), barriers, and opportunities across jurisdictions. Several industry players have also done surveys — those tend to focus on more specific segments of the legal technology market and have not been considered here.

- **AI Usage:** Nationally, the 2023 ABA Legal Technology Survey Report found generative AI usage among lawyers at approximately 10%, indicating a lower baseline nationally. However, recognizing the speed of uptake of generative AI since 2022, it is likely that adoption has grown since the report's publication, reflecting broader technological trends. That growth is mirrored in an ALPS study in 2024, finding that 20% of its lawyer respondents were using AI in their day to day business. In the UK, a 2023 survey found 13% of lawyers using AI, growing to 26% by 2024. Subsequent polling suggests that a significant portion of UK lawyers plan to adopt AI tools in the near future, pointing to rapid acceptance and integration.

  One recent consumer survey that included questions on use of AI for legal purposes from LexisNexis offered an interesting comparison point. While the WSBA Tech Task Force survey found 25% of legal professionals are using generative AI in their practice, the LexisNexis survey found that 27% of consumers have used generative AI to answer legal questions for themselves.

- **Barriers to adoption:** Similar barriers are reported in several surveys. In particular, the above referenced surveys from the ABA and the UK highlight cost, lack of expertise, and concerns about ethical implications as common challenges to the adoption of useful technology tools.

- **Cybersecurity Practices:** Similar to the WSBA Legal Technology Task Force Survey, the ABA's 2021 Legal Technology Survey Report underscores that many firms fail to implement fundamental security measures despite rising threats. Cybersecurity remains a universal challenge, particularly for smaller firms without dedicated IT resources.

- **Access to Justice:** Across jurisdictions, there is growing interest in using technology to enhance access to legal services. The UK surveys highlighted pilot projects aimed at leveraging AI for pro bono services and self-help resources, generally supported by bar members.

## NEXT STEPS FOR THE TASK FORCE

The Task Force is using these findings and the underlying survey responses to help guide its priorities. The work is part of the Task Force's overall research and analysis to inform final recommendations for the WSBA Board of Governors. The Task Force has reviewed these results within its Working Groups and at the full Task Force level.

**For additional survey results and quantitative analysis, please refer to the Final WSBA Technology Survey Report from NBRI and the slide deck called "WSBA Tech Task Force Member Survey – results overview."**

# Legal Tech TF - Policy Recommendations

## INTRODUCTION

**This document includes the BOG Legal Technology Taskforce Report policy recommendations. Policy recommendations appear in Key Points 2, 3, 6, 7, 8, 9, & 10.**

**The BOG will need to decide how to handle the policy recommendations. The BOG analysis requires assistance from WSBA staff (led by Kevin Plachy and Margeaux Green).**

## POLICY RECOMMENDATIONS BY KEY POINT

**Key Point 1: Harnessing Potential – The Role of Practitioners**

- *No policy recommendations*

**Key Point 2: Building WSBA Capacity and Strategic Partnerships**

- Develop a Strategic Technology Plan

**Key Point 3: Supporting Technology Competence – Meeting Diverse Practice Needs**

- Recommend a Technology MCLE Requirement
- Explore Adding Technology and the Law as an Area in the Bar Exam

**Key Point 4: Building Ethical Frameworks**

- *No policy recommendations*

**Key Point 5: Bridging the Cybersecurity Confidence Gap – From Confidence to Competent**

- *No policy recommendations*

**Key Point 6: Strengthening Court Capacity – Advancing Justice Through Digital Transformation**

- Provide Comprehensive Court Training on AI and Technology
- Upgrade Courtroom Technology
- Update Rules on Electronic Evidence
- Implement AI Detection Tools
- Enhance Language Access Through AI
- Simplify Court Forms and Filings
- Advocate for Standardized, Statewide Court Data Infrastructure Fully Funded by the State

**Key Point 7: Law Schools**

- Embrace a Technology Conscious Culture
- Maintain a Practice-Ready Curriculum
- Assess Student Progress
- Support Faculty
- Influence Broader Law and Policy Development

**Key Point 8: Advancing Ethical Innovation and Equitable Access – Leveraging AI to Close the Justice Gap**

- Establish Ethical Boundaries for AI Legal Tools – Regulatory
- Expand Court-Based AI Resources – Talk about this with the Court Capacity group
- Foster Development of Affordable and Scalable Tools

**Key Point 9: Safeguarding Sensitive Legal Data – Strengthening Consumer Protection in a Digital Era**

- Advocate for Updated Consumer Protection Laws (Legal)
- Advocate for Enhanced Consumer Privacy Protections (Legal)
- Develop Consumer-Focused Certification Programs

**Key Point 10: Ensuring Regulatory Innovation and Stability – Future Expertise and Oversight**

- Petition for a Dedicated Technology Oversight Board or Expanded Practice of Law Board

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# WSBA Technology Implementation Workgroup Charter

Established by the Executive Director in May 2026

## Purpose

The WSBA Technology Implementation Workgroup is an internal workgroup established under the authority of the WSBA Executive Director. Its purpose is to work collaboratively with WSBA staff to implement the approved operational recommendations from the 2025 WSBA Legal Technology Taskforce Report. The workgroup focuses on practical execution, resource development, implementation planning, and processes to support WSBA members in adopting technology effectively and ethically.

## Background

In November 2023, the Board of Governors (BOG) acknowledged the significant impact of technology, especially artificial intelligence (AI), on the legal profession. They adopted a strategic priority for the 2023-24 fiscal year to assess technology-related opportunities and threats and define WSBA's role in regulation, consumer protection, and support for legal professionals. The creation of the Legal Technology Taskforce was a step towards this goal.

The taskforce's objectives were to evaluate the legal technology landscape, identify threats and opportunities, and make recommendations to enhance the use of technology in legal practice. Their focus was on promoting effective, efficient, and ethical technology use to improve access to justice. The BOG accepted the taskforce's final report in September 2025 and directed it to the Executive Committee for further evaluation and action. One key recommendation was to establish a WSBA Technology Implementation Workgroup to collaborate with WSBA staff on implementing approved recommendations.

## Workgroup Objectives

The workgroup will collaborate with WSBA staff and stakeholders to begin implementing selected operational recommendations and develop plans for the WSBA staff to carry out remaining recommendations beyond the group's term.

## Volunteer Roles

The workgroup will be staff-led by WSBA project leads. Topic based subgroups may have volunteer project leads who set subgroup meetings, coordinate draft materials, assign tasks to subgroup volunteers, and work collaboratively in guiding the work with WSBA staff project leads. Workgroup volunteers and volunteer project leads play an essential collaborative role in WSBA's work, while WSBA retains responsibility for final decision making.

Workgroup participants are expected to actively contribute subject matter expertise, drafting support, resource development, implementation planning, and related subgroup work. Subgroup work will include creating and reviewing draft resources, identifying member needs, evaluating implementation strategies, and collaborating with WSBA staff.

All final decisions will remain with WSBA staff and leadership, including WSBA programs, partnerships, publications, member benefits, implementation priorities, and official resources.

## Prioritized Topic Areas and Subgroup Work

The workgroup will focus on five prioritized topic areas, addressed in the following order:

1. Artificial Intelligence
2. Cybersecurity
3. Ethics and Responsible Technology Use
4. Technology Tools, Vendors, and Member Benefits
5. Access to Justice and Inclusive Technology Use

These topic areas are intended to focus the workgroup's efforts on practical, member-facing resources for solo and small firm practitioners, particularly members with limited familiarity with emerging technology, cybersecurity, vendor evaluation, or technology-related ethical obligations.

The workgroup will use topic-based subgroups. Each subgroup will focus on one prioritized topic area and will be responsible for identifying member needs, developing and creating practical resources, recommending future programming, and creating a roadmap for continued work in that area. Subgroups may also coordinate with internal stakeholders and external subject matter experts as appropriate to support implementation planning and resource development. The work may be sequenced over time, with approximately two subgroups working at the same time, depending on staff capacity, volunteer availability, and project priorities.

Each subgroup should consider:

1. What practical questions are members likely to have about each topic?
2. What practical resources, guidance, or implementation support would be most useful for solo and small firm practitioners?
3. What existing WSBA resources can be gathered, updated, or repurposed?
4. What new resources should be developed, including checklists, guides, sample policies, FAQs, toolkits, vendor guidance, demonstrations, or implementation frameworks?
5. What CLEs, workshops, demonstrations, section programs, or other educational opportunities should be created during the workgroup's tenure and in the future?
6. What materials should ultimately be included in the new WSBA Technology Resource Hub?
7. What future implementation, advanced programming, or longer-term resource development be planned beyond the subgroups initial term?

These topic areas are not intended to be rigid silos. Several recommendations overlap across multiple areas, particularly resource development, ethics, education, vendor evaluation, member benefits, and the new Technology Resource Hub. The Technology Resource Hub, a new user-friendly WSBA online resource center, will include curated checklists, sample policies, toolkits, vendor directories, FAQs, and other training materials. Subgroups should identify overlap where appropriate and coordinate with staff project leads to avoid duplication.

### 1. ARTIFICIAL INTELLIGENCE

This topic area will focus on helping members understand, evaluate, and use AI tools in a practical and responsible way. The subgroup should address basic AI concepts, common legal and law firm management use cases, tool selection, AI firm policies, risk management, confidentiality, accuracy, bias, supervision, and other professional responsibility considerations related to AI-assisted work.

Focus areas may include:

- How should solo or small firm lawyers evaluate whether an AI tool is appropriate for their practice?
- What policies, guidance, or risk-management practices should firms consider when using AI tools?
- How can lawyers use AI tools while protecting client confidentiality and complying with professional obligations?
- What AI-focused CLEs, workshops, practical resources, or future educational programming would be most useful to members?

## 2. CYBERSECURITY

This topic area will focus on helping members understand and implement practical cybersecurity protections, particularly solo and small firm practitioners who may not have dedicated IT support. The subgroup should address basic cybersecurity practices, affordable risk assessments, training needs, cyber insurance or malpractice considerations, data protection, and simplified member-facing guidance.

Focus areas may include:

- What foundational cybersecurity practices should every solo or small firm lawyer understand?
- What practical guidance, assessment tools, or implementation support would help members protect client information and reduce risk?
- What practical steps can members take to protect client information?
- Should WSBA explore partnerships with cybersecurity experts, malpractice carriers, or vendors to provide discounted or free assessments?
- What current and future CLEs workshops or educational campaigns would be most useful to members?

## 3. ETHICS AND RESPONSIBLE TECHNOLOGY USE

This topic area will focus on practical ethics guidance related to technology use in legal practice. The subgroup should address confidentiality, competence, supervision, transparency, bias, security, inaccurate outputs, client communication, data issues, and other professional responsibility considerations related to emerging technologies.

Focus areas include:

- What ethical questions are members most likely to face when adopting new technologies?
- What practical frameworks, guidance, or evaluation tools would help members assess technology-related risks and obligations?
- What guidance should be provided regarding confidentiality, transparency, accuracy, supervision, bias, security, and responsible technology use?
- What ethics focused CLEs, practical resources, or educational materials would help members better understand technology related professional responsibility obligations?
- What ethics issues should be addressed specifically for AI tools?
- What ethics issues should be addressed across all technology, not just AI?
- What checklists, FAQs, short videos, training modules, CLE segments, or online resources would help members quickly understand their obligations?

## 4. TECHNOLOGY TOOLS, VENDORS, AND MEMBER BENEFITS

This topic area will focus on how the WSBA can help members evaluate, access, and adopt affordable technology tools. The subgroup may consider WSBA's internal evaluation process for technology

vendors and member benefits (including the Practice Management Discount Network), opportunities to expand access to affordable or low-cost technology tools, technology demonstrations, educational partnerships, and practical guidance for selecting and implementing tools.

Focus areas may include:

- What kinds of tools are useful to solo and small firm practitioners to practice law or manage a law firm business?
- What guidance would help members evaluate, compare, and implement legal technology tools appropriately within their practices?
- What criteria or processes should WSBA consider when evaluating potential vendor partnerships, discounts (Practice Management Discount Network), or other member benefits?
- How should WSBA explore free or discounted tools in areas such as AI, cybersecurity, practice management, or document management?
- How can WSBA maintain fairness, transparency, confidentiality, and accountability in vendor related programs?

### 5. ACCESS TO JUSTICE AND INCLUSIVE TECHNOLOGY USE

This topic area will focus on how technology can support access to justice, inclusive legal services, and practical support for members serving clients with diverse needs. The subgroup may consider client-facing technology issues, accessibility, digital barriers, inclusive technology use, plain-language communication, innovative legal service delivery models, and opportunities for collaboration with outside stakeholders.

Focus areas may include:

- How can technology help lawyers deliver legal services more effectively, accessibly, and inclusively?
- What barriers do lawyers or clients face when using legal technology, including accessibility or digital access barriers?
- What guidance or educational resources would help members better understand inclusive and ethical technology use?
- How can technology support innovative legal service delivery models, client communication, or broader access to justice goals?
- What partnerships, educational initiatives, or future programming opportunities should WSBA explore related to access to justice and inclusive technology use?

## Timeline and Work Structure

The workgroup is expected to operate through topic-based subgroups or project teams working on designated implementation priorities. Subgroup work may occur concurrently or in phases depending on project scope, staff capacity, volunteer availability, and implementation priorities.

WSBA staff project leads may establish, modify, pause, conclude, or expand subgroup work over time as implementation needs evolve. Additional volunteers, subject matter experts, internal stakeholders, or ad hoc participants may be invited to support specific subgroup initiatives or deliverables as appropriate.

The workgroup's term is expected to continue for approximately 12 to 15 months, although individual subgroup timelines, participation, and deliverables may vary.

## Composition

The workgroup may include volunteers, subject matter experts, and other participants with demonstrated experience, knowledge, or practical expertise in one or more of the following areas:

- Legal technology and law practice technology implementation,
- Artificial intelligence tools, governance, or responsible AI use,
- Cybersecurity, privacy, risk management, or data protection,
- Law firm operations, legal practice management, or legal business systems,
- Technology evaluation, procurement, or legal technology partnerships,
- Ethics and professional responsibility considerations related to technology use,
- Legal education, CLE development, or member training,
- Access to justice, accessibility, or inclusive technology initiatives, and
- Related operational, technical, or subject matter expertise relevant to the workgroup's priorities

Participants may include lawyers, legal professionals, technologists, consultants, educators, cybersecurity professionals, operational leaders, and other subject matter experts as appropriate.

## Nominations and Appointment

The WSBA Executive Director, in collaboration with the WSBA Advancement Department Director and WSBA Practice Management Advisor, may appoint workgroup participants, subgroup participants, project leads, or other volunteers as appropriate to support the workgroup's implementation priorities.

## Term

The workgroup is expected to operate for approximately 12 to 15 months or until designated implementation priorities are substantially completed. Individual participant involvement may vary depending on subgroup assignments, project timelines, implementation needs, and volunteer availability.

*AI Disclosure: This document was generated in part and edited with Microsoft Copilot's AI and reviewed for accuracy by Margeaux Green*

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Alexander R. Reaganson, FY26 Chair
Washington New Members Committee

Chelle Gegax, WNMC Staff Liaison
Washington State Bar Association

**DATE:**

**RE:** Proposed WNMC Charter

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**ACTION**: Approve Washington New Members Committee Charter

The Washington New Members Committee seeks to formally articulate its purpose of supporting the professional development of new members of the Washington State Bar Association (WSBA) through mentorship, leadership opportunities, and resources that address critical challenges such as student debt, practical skills gaps, and pro bono/volunteering opportunities. The proposed charter establishes a defined structure, scope, and set of responsibilities for the committee, while addressing longstanding vacancy issues by transitioning from regional to congressional district representation, consistent with the structure of the WSBA Board of Governors. It further introduces a clear process for filling positions that remain vacant for more than six months, ensuring continuity and operational stability. By aligning the committee's framework with that of the Board of Governors, the charter enhances cross-entity collaboration, clarifies representational pathways, and strengthens alignment with organizational priorities. Committee performance will be evaluated through measures of new member satisfaction, participation in events and initiatives, communication and social media engagement, and consistent committee staffing and involvement. Continued coordination with the Board of Governors and other WSBA entities will serve as an additional indicator of success. The charter also maintains the committee's annual reporting obligations and establishes a five-year review cycle by the Board. Collectively, these provisions are intended to promote clarity, consistency, accountability, and alignment in the committee's work. The Washington New Members Committee respectfully requests that the Board of Governors review the proposed charter with the goal of implementing it on October 1, 2026.

Background

The issue has not previously been brought before the Board in its current form; however, elements of the Washington New Members Committee's work have been discussed in past years, primarily in connection with broader new-lawyer support initiatives. Since then, the committee has refined its structure, clarified its mandate, and developed a formal charter to address persistent operational challenges, including vacancies and inconsistent representation. Historically, WSBA has supported new members through programs such as mentorship initiatives, professional development offerings, and committee-based engagement, but the absence of a clearly defined governing charter has limited the committee's ability to operate with consistency and alignment. The need for a formalized structure became increasingly apparent through member feedback, participation data, recurring vacancy patterns, and direct observations from committee leadership regarding uneven representation across regions. In response, the committee undertook an extensive review of its operational history, examined structural models used by other WSBA entities, and evaluated alternative approaches—including maintaining the existing regional model—before determining that alignment with congressional districts would provide greater clarity and stability. An equity lens informed this analysis by highlighting the importance of consistent representation for underserved or geographically dispersed new members, ensuring that the committee's structure supports equitable access to mentorship, leadership opportunities, and resources. Potential barriers include the transition to the new representational model and the process for filling persistent vacancies; these challenges will be addressed through clearly defined appointment procedures, alignment with the Board of Governors' structure, and regular evaluation through charter reviews. Together, these efforts support a more accountable, equitable, and sustainable framework for new-member engagement within the WSBA.

Community Input

The decision will primarily affect new members of the Washington State Bar Association, with particular significance for individuals from historically underrepresented or marginalized communities, including people with disabilities, people of color, members of the LGBTQ community, women, and transgender and non-binary individuals. These groups often face compounded barriers to professional integration, mentorship access, and leadership opportunities, making a clear and equitable committee structure especially impactful for them. Their perspectives were meaningfully incorporated through ongoing member feedback, committee discussions, participation in listening sessions and engagement events, and the review of demographic and participation data that highlighted disparities in representation and engagement. This input informed both the identification of the underlying challenges and the development of the proposed solution, ensuring that the charter supports more consistent and equitable access to resources and leadership pathways. In line with that assessment, the three new proposed at-large positions on the committee additionally address issues and often

overlooked populations within the new member community, and WSBA priorities at-large. To bridge the gaps between those communities, it was determined by the committee that establishing roles to address Diversity, Equity, and Inclusion (DEI) issues, Pro Bono & Public Service connections, and liaison with new Solo & Small Practice practitioners was needed. This equity-centered approach reinforced the need for a stable structural model, clearer representational pathways, and mechanisms to reduce prolonged vacancies, all of which help ensure that marginalized groups are not unintentionally excluded. Potential barriers include ensuring adequate representation across geographically diverse congressional districts and maintaining engagement from members who may face systemic or logistical challenges. These will be addressed through intentional recruitment strategies, the newly defined vacancy-filling procedures, and ongoing evaluation to ensure the structure remains responsive and inclusive.

As for internal WSBA community input, the committee had previously sought review of a previous draft of this charter by the Equity & Justice Team and the Office of General Counsel.

Information for Fiscal Analysis

A review of existing WSBA programs indicates that no comparable initiative currently appears in the WSBA budget that specifically provides a formalized governance structure for the Washington New Members Committee; however, the committee's work intersects with broader new-lawyer programming historically supported by the organization. The proposed charter does not require the creation of a new program or specialized technology, and therefore no additional programmatic budget is anticipated beyond the minimal administrative support already allocated to WSBA committees. Implementation of the charter is expected to require a modest amount of staff time for onboarding, appointment coordination, and ongoing administrative facilitation, all of which fall within the ordinary scope of committee support functions. Because no new technology or system is required—and because comparable technological alternatives were assessed and deemed unnecessary, the proposal does not introduce new technology-related costs. While the charter is not designed as a revenue-generating initiative, increased clarity, structure, and member engagement may yield indirect organizational benefits, such as stronger participation in WSBA programs and leadership pathways. The proposal is not expected to produce direct cost savings, but its emphasis on structural stability, reduced vacancy periods, and alignment with the Board of Governors may improve operational efficiency, reduce administrative overhead associated with repeated vacancy management, and provide long-term value to both staff and the membership community.

Information for Equity Analysis

The factors influencing this issue disproportionately affect individuals and communities that have been historically underrepresented or marginalized within the legal profession, including people with disabilities, people of color, members of the LGBTQ community, women, and transgender and non-binary individuals. Existing institutional structures, legacy appointment practices, geographic disparities, and unequal access to mentorship or leadership pathways can deepen these inequities, particularly when committee vacancies or inconsistent representation limit opportunities for connection and engagement. Root causes include systemic barriers to inclusion within the profession, uneven distribution of professional networks, and the compounding effects of intersecting identities—for example, LGBTQ individuals of color who may face multiple layers of bias and structural exclusion. Based on available participation data and committee feedback, the proposed action is expected to benefit these communities by clarifying representational pathways, creating a more stable structure, and ensuring vacancies are filled in a timely and predictable manner. However, additional demographic and engagement data would strengthen the analysis, particularly regarding how various identity groups interact with committee programming and whether existing barriers persist. The action is designed to increase equity by creating a more consistent and accountable system, though potential unintended consequences—such as representational gaps within congressional districts or uneven access to leadership opportunities—should be continuously monitored. Strategies to improve equity include intentional outreach to marginalized groups, transparent appointment and recruitment processes, and ongoing evaluation of demographic participation trends. Implementation will incorporate mechanisms for accountability through annual reporting, periodic charter reviews, and regular consultation with communities most impacted. Success will be measured by increased engagement, improved satisfaction among underrepresented new members, and demonstrated stability and inclusivity in committee representation and operations. Additionally,

Conclusion

Since the COVID-19 pandemic, the Washington New Members Committee has continued to reorganize and push for a reinvigoration of the new members community, here in the State of Washington. The WNMC in recent years has taken the steps to expand and redefine what it means to be a "new member," reestablished our connections to the Board of Governors, Washington law schools, and other WSBA entities, and made our presence known on the national stage within the American Bar Association – Young Lawyers Division. In order to continue this improvement, the next logical step is to help formalize a structure for future committees to look to and work within. After careful consideration over the past six (6) months, the committee offers this

proposed charter as that structure. We are available to answer any questions and/or provide relevant commentary, as needed by the Board.

Sincerely,

Alexander R. Reaganson, WSBA# 59365
FY26 Chair, Washington New Members Committee
Charter Development Project, Team Lead

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

The risk analysis is included in the BOG's confidential materials.

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

There are a variety fiscal impacts to WSBA resulting from the proposed charter, which includes expanded costs for the size and make-up of the Committee and increased programming. The proposed charter adds two new committee positions, increasing the size from 18 to 20 members. This will result in additional Committee member expenses, such as travel, meals, and accommodations for in-person meetings, events, trainings, or conferences, which will be reimbursed according to rates and limitations outlined in WSBA's fiscal policies. The proposed charter also includes changes to the committee member representation from regions to congressional districts and increasing the number of at-large positions from 3 to 6. The switch from regions to congressional districts should not significantly affect costs, while the increased number of at-large positions could lead to varying expenses based on where those members are located since they aren't tied to a specific area. The charter also includes goals and objectives that can result in direct costs for programming, such as the development of new mentorship programs and expanding the number and type of outreach events. The cost will vary each year, depending on the workplan of the WNMC. The first draft of the FY 2027 budget was prepared with the proposed charter in mind and includes a total of $18,500 for New Member Outreach Events (increased from $5,000 in FY 2026) and $30,500 (increased from $15,000 in FY 2026). Additionally, the fiscal impact includes staff time used to assist in drafting the charter, incorporate the changes into relevant records and systems, communicate changes to stakeholders, and provide administrative support to additional volunteers. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and does 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 purpose of the equity analysis is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 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 charter itself appears to be reasonably informed by the perspectives of communities that are underrepresented and marginalized in the Washington legal profession and are intended to address existing challenges with recruiting and retaining leadership diversity.

The substance of the proposed WNMC Charter will include changes to its structure and purposes that have a potential to increase transparency and consistency and improve the WSBA's ability to engage with and gather data to support the specific needs of new members.

Attachments

Exhibit A: *Washington New Members Committee Charter*
Exhibit B: *Committee Member Region vs. Congressional Comparison*
Exhibit C: *Proposed Congressional District Implementation*

WASHINGTON STATE
BAR ASSOCIATION

**WASHINGTON NEW MEMBERS COMMITTEE (WNMC) CHARTER**

**Purpose:**

Support the professional development of new members of the Washington State Bar Association (WSBA) by providing mentorship, leadership opportunities, and resources that address pressing challenges such as student debt and practical skills gaps. The committee aims to serve as a trusted resource for stakeholders and foster meaningful new member engagement within the legal community.

**Goals, Objectives and Activities:**

**Goal 1. Be Data-Driven.**

- *Objective A*. Collect and analyze data on new members' needs through post-licensure surveys and other evaluative forms.
    - *Activity 1*: Prepare and conduct regular surveys, including the following:
        - To regularly assess and provide opportunities for new members to express any needs and provide evaluative feedback, and;
        - To annually assess new admittees' early acclimation through new admittee surveys.
    - *Activity 2*: Produce reports and provide recommendations to the Board of Governors based on data-driven insights.
    - *Activity 3:* Regularly explore and develop independent committee projects and participate in projects across WSBA in line with appropriate data.

**Goal 2: Advocate.**

- *Objective A*. Represent, advise and advocate for new members within the WSBA Board of Governors and other decision-makers to ensure new member issues and voices are included in decision-making.
- *Objective B*. Address regular and emerging challenges unique to new members, such as student loan repayment and opportunities for practical skills development.

**Goal 3. Grow and Connect.**

- *Objective A*: Develop and/or promote formal and informal mentorship programs to facilitate development of legal practice skills
    - *Activity 1*: Research and review mentorship programs established by affinity bar associations and/or other state bar associations to guide current and future programs.
    - *Activity 2:* Engage in relevant networking to connect new members to additional mentorship opportunities.
    - *Activity 3:* Identify and pursue opportunities for practical skills development for new members.
- *Objective B*: strengthen connections with law schools, affinity bars and WSBA entities.
    - *Activity 1*: Host in-person meetings and outreach events at law schools.

    - *Activity 2:* Support and collaborate with all WSBA law student representatives to ensure effective student engagement.
    - *Activity 3:* Explore and seek out partnerships with affinity bar organizations and relevant WSBA entities on WNMC priorities and events.
- *Objective C*: Foster a positive culture and meaningful networks of support.
    - *Activity 1*: Maintain active communication through social media, relevant WSBA listservs, and other appropriate channels.

**Goal 4: Pro Bono Empowerment.**

- *Objective A*: Build and/or promote partnerships that enable new members to engage in pro bono work with malpractice coverage and supervision.
    - *Activity 1*: Maintain an active relationship with both the Access to Justice Board and WSBA Pro Bono & Public Service Committee.
    - *Activity 2:* Seek out and develop networks to allow new members to engage in pro bono and public service work.

**Goal 5: Professional Development.**

- *Objective A*: Promote CLEs, experiential learning, and leadership opportunities tailored to new members.
    - *Activity 1:* Coordinate professional development opportunities and CLE sessions tailored to the evolving needs of new members.
    - *Activity 2*: Engage with and advertise the WSBA Trial Advocacy Program and Practice Primers.
    - *Activity 3:* Participate in recruitment efforts for relevant leadership and subject-matter expert opportunities for new members, especially in WSBA New Member Education programs.
- *Objective B*: increase engagement through section liaison roles and other leadership opportunities.
    - *Activity 1*: Interview and nominate candidates for the WSBA Board of Governors New Member At-Large seat (when needed).
- *Objective C*: Establish robust pathways and partnerships to ensure new members feel supported in the profession.

**Meetings**

- Time and Place: The WNMC shall meet monthly, virtually, for one (1) hour unless otherwise noted by this Charter or at the discretion of the Chair;
    - One per quarter, meetings shall be held in-person/hybrid, for three (3) hours with an additional hour for lunch.
        - At least one (1) of the in-person/hybrid meetings shall be set for a time and place that aligns with the applicable regular Board of Governors meeting.
- Meeting Expectations:
    - All regular meetings of the WNMC shall comply with Art. VII(B) "Open Meeting Policy," of the WSBA Bylaws.
    - The Chair shall establish an agenda for each monthly meeting and ensure such agendas are distributed approx. one (1) week prior to each meeting, in coordination with the WNMC Staff Liaison(s).
    - If the Chair is unable to attend any scheduled meeting, the Chair-Elect shall assume the role and its responsibilities, for that meeting; if the Chair-Elect is also unavailable, then the Immediate Past Chair shall assume the same.

- It is expected that all members of the WNMC shall have no more than two (2) unexcused absences from regular meetings.
- It is expected that all members of the WNMC shall actively participate in at least one (1) project team.

**Committee Membership**

- Leadership Team:
  - The Chairs:
    - Chair
    - Chair-Elect, as Vice Chair
    - Immediate Past Chair
  - Governor, At-Large (New Members), WSBA Board of Governors, *ex-officio*
  - WNMC Staff Liaison(s), *ex officio*
- Congressional District Representatives (Eligibility based on either home or work address):
  - District 1
  - District 2
  - District 3
  - District 4
  - District 5
  - District 6
  - District 7 (North)[1]
  - District 7 (South)[2]
  - District 8
  - District 9
  - District 10
- Six (6) At-Large Representatives:
  - Diversity, Equity and Inclusion Representative
  - QLSP, Public Service Representative
  - Solo and Small Practice Representative
  - Three (3) General At-Large Representatives
- Terms:
  - The voting members of the WNMC shall be appointed for a term of three (3) years.
  - The terms of At-Large and District Representatives shall be staggered so no more than one-third (1/3) of these positions' terms end each year, categorized accordingly:
    - Class A (with terms beginning October 1, 2026):
      - At-Large: General Representative (Class A)
      - At-Large: Diversity, Equity and Inclusion Representative
      - District 2
      - District 5
      - District 7 (North)
      - District 10
    - Class B (with terms beginning October 1, 2027):
      - At-Large: General Representative (Class B)
      - At-Large: Public Service Representative
      - District 3
      - District 4

[1] As defined by zip code boundaries established in the District 7 (North) position on the WSBA Board of Governors.
[2] As defined by zip code boundaries established in the District 7 (South) position on the WSBA Board of Governors.

        - District 7 (South)
    - Class C (with terms beginning October 1, 2028)
        - At-Large: General Representative (Class C)
        - At-Large: Solo & Small Practice Representative
        - District 1
        - District 6
        - District 8
        - District 9

**Nominations and Appointment**

- The WSBA Executive Director will designate WSBA staff liaison(s) to support the WNMC, as the WNMC Staff Liaison(s).
- WNMC Committee members will be appointed by the Board of Governors in accordance with WSBA Bylaws Art. IX(B)(1), upon recommendation by the WNMC's Recommendations Subcommittee.
- **Recommendations Subcommittee:**
    - The purpose of the Recommendations Subcommittee shall be to review and consider all applicants to voting positions on the WNMC, as well as recommend qualifying candidates to the Board of Governors for appointment.
    - The Recommendations Subcommittee shall include all members of the WNMC Leadership Team.
        - Recommendation decisions shall be decided by a majority vote of the Subcommittee, with three total votes allocated accordingly:
            - One collective vote for the Chairs (Chair, Chair-Elect, Immediate Past Chair);
            - One collective vote for the WSBA Staff Liaisons, and;
            - One vote by the Governor At-Large, New Members.
        - It is understood that decisions by the Recommendations Subcommittee are preferred to be unanimous. However, should there be a significant split as to a recommendation, the Committee may vote to provide no more than two (2) recommendations for the Board of Governors to consider.
            - If such an event occurs, the Recommendations Subcommittee may inform the Board of Governors of each individual member's votes for each applicant.
    - *Chair-Elect Recommendations:* The Recommendations Subcommittee shall recommend a Chair-Elect, from amongst qualifying applicants for the position, no later than February 28th (or 29th during a Leap Year) of each year for service beginning October 1, following appointment by the WSBA-BOG President-Elect in accordance with WSBA Bylaws Art. IX(B)(1)(c).
        - Should a current district or at-large representative be appointed as Chair-Elect, the position of said representative shall become vacant and any remaining term shall be open for applications during the regular committee recruitment process (beginning in April of each year), unless the position is filled by a mid-term appointment in accordance with the WSBA Bylaws and this Charter.
        - The Chair-Elect will serve a three-year term, split accordingly: one (1) year as Chair-Elect; one (1) year as Chair, and; one (1) year as Immediate Past-Chair.
    - *At-Large, District Representative Recommendations:* The Recommendations Subcommittee shall recommend individuals to the at-large and district

representative positions based on factors which will achieve the broadest range of diversity, practice area, and experience possible.

- *Prolonged Vacancies:* If any at-large or district representative positions have not been filled after six (6) consecutive months of vacancy, the Recommendations Subcommittee may recommend to such position(s) any individual(s) that agree to represent the perspective of that position in good faith, regardless of the individual's practice area or district of residence/employment.

**Success Criteria**

- Data showing net-positive new member satisfaction and integration across current and relevant priorities.
- Increased evidence of new members regularly attending, engaging with, and providing evaluative feedback on WNMC events and initiatives.
- Regular communication with new members, with corresponding positive social media engagement analytics.
- A fully staffed and engaged committee both in terms of attendance and project team participation.
- Proactive engagement and consultation with the WNMC by the WSBA Board of Governors and other bar entities.

**Reporting & Evaluation**

- *Annual Report*. The committee will produce an annual report pursuant to the WSBA Bylaws.
- *Charter and Entity Evaluation*. The work of the committee and its charter should be reviewed and renewed by the Board of Governors every five years after approval of the original charter.

**Approved by the FY26 Washington New Members Committee, this 16th Day of March, 2026**

Alexander R. Reaganson

**Alexander R. Reaganson, WSBA# 59365**
***2025-2026 Chair, Charter Team Lead***

**Janta Steele, WSBA# 60876**
***Chair-Elect, Charter Team***

**Mason Ji, WSBA# 58292**
***Imm. Past Chair, Charter Team***

**Ariel L. Cook, WSBA# 63105**
***Greater Olympia Rep., Charter Team***

**Mackenzie J. Lloyd, WSBA# 60238**
***Southeast Reg. Rep., Charter Team***

**Fatima Sami Al-Rikabi, WSBA# 63579**
***Snohomish Co. Rep., Charter Team***

**Matthew Rommelmann, WSBA# 60749**
***Northwest Representative***

**Chawisa Laicharoenwat, WSBA# 60882**
***At-Large Representative***

**Hanna Terra Harrison, WSBA# 58264**
***Greater Spokane Representative***

**Michelle Margaret Heese, WSBA# 62815**
***North Central Representative***

**Steven C. Brown, Jr., WSBA# 54096**
***At-Large Representative***

**Stephan Yhann, WSBA# 54230**
***At-Large Representative***

**Bethany Beal Nolan, WSBA# 55788**
***King Co. Representative***

**Mackenzie Spinks, WSBA# 62048**
***King Co. Representative***

**Thomas Lyle Garvey, WSBA# 57283**
***Peninsula Representative***

**Jordan Lee Couch, WSBA# 49684**
***New Member Gov. (At-Large), WSBA-BOG***

**Michelle Gegax**
***WNMC Staff Liaison***

**Vanessa Sweeny**
***WNMC Staff Support***

Region to Congressional District Committee Membership Comparison:

Current Regions (Cong. Dist.), Current Occupant

Organized by Current Term End Date. (Term-Limited**)

- Oct. 2026
    - Southwest (CD: 3), Vacant
    - Northwest (CD: 2), Matt R.
    - North Central (CD: 4, 5, 8), Michelle H.
    - Greater Olympia (CDs: 3, 10), Ariel C.
    - Greater Spokane (CD: 5), Hanna H.
    - King County (1) (CDs: 1, 2, 7, 8, 9), Bethany N.
    - At-Large (1), Stephan Y.**
    - Southeast (CDs: 4, 5), Mackenzie L.
- Oct. 2027
    - King County (2) (CDs: 1, 2, 7, 8, 9), Makenzie S.
    - At-Large (2), Steven B.
    - Peninsula (CD: 6), Thomas G.
    - South Central (CDs: 4, 8), Vacant
    - Pierce (CDs: 6, 8, 10), Vacant
- Oct. 2028
    - Snohomish (CDs: 1, 2), Fatima Al-Rikabi
    - At-Large (3), Chawisa L.**

**Implementation/Conversion Plan for Current Sitting Committee Members**[1]

Class A (with terms beginning October 1, 2026)[2]:

- At-Large: General Representative (Class A): TBD with current cycle
- At-Large: Diversity, Equity and Inclusion Representative: TBD with current cycle
- District 2: TBD with current cycle
- District 5: TBD with current cycle
- District 7 (North): TBD with current cycle
- District 10: TBD with current cycle

Class B (with terms beginning October 1, 2027):

- At-Large: General Representative (Class B): Steven B.
- At-Large: Public Service Representative: Available for Interim Appt.[3]
- District 3: Available for Interim Appt.[4]
- District 4: Mackenzie L. (Interim, would be a one-year extension of current term)
- District 7 (South): Bethany N. (Interim, would be a one-year extension of current term)

Class C (with terms beginning October 1, 2028)

- At-Large: General Representative (Class C): Chawisa L.
- At-Large: Solo & Small Practice Representative: Available for Interim Appt.
- District 1: Fatima Al-Rikabi
- District 6: Thomas G. (Interim, would be a one-year extension of current term)
- District 8: Michelle H. (Interim, would be a two-year extension of current term)
- District 9: Makenzie S. (Interim, would be a one-year extension of current term)

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[1] The following plan was developed accounting for the most practical spread of congressional districts in a manner that allows for similar-sized "classes" that are geographically-diverse throughout the State of Washington. Current committee members' assignments or designations were made based on a review of their current positions related congressional districts, current term schedules, and eligibility for interim appointments based on completed terms of committee service. The suggested interim appointments were purposefully limited to those that would only see a one-year extension of their term, unless no other option was available for a district. (i.e. CD 8). If multiple persons were eligible for a particular interim appointment, preference was given to 1) individuals who have not previously been a member of WNMC Leadership, and; 2) those with a newer service history on the WNMC.

[2] For the purpose of this plan, no interim appointments were suggested regarding Class A as to allow for consideration of eligible applicants who participated in the regular volunteer recruiting period for FY 27. Pending approval of this draft charter by the Board of Governors, the WNMC is prepared to open up a second recruiting period and provide recommendations for approval to the Board prior to the start of FY 27.

[3] Given the inaugural nature of the new topic-focused at-large positions, no persons were selected as potential interim appointments for these positions. Pending charter approval, the WNMC plans to consider eligible applicants who participated in the regular recruitment period and, if necessary, open up a second recruiting period and provide recommendations for approval to these positions prior to the start of FY 27.

[4] The District 3 position was not assigned a potential interim appointment due to the fact that no eligible committee member currently resides/works within this district nor has substantial ties to the district.

Other Current Committee Members Eligibility for Other Interim Appointments

- Congressional District Appointments: (Reasons Therefore):
    - Ariel C.
        - District 3 (Minimal ties from previous regional role)[5];
        - District 7 (South) ("Home" zip code[6] is split between CD 7(S) & CD (9))
        - District 9 ("Home" zip code is split between CD 7(S) & CD 9))
    - Mason J.
        - District 7 (South) ("Home" Zip Code)
- For Interim At-Large Appointments (If not in a CD Role):
    - Ariel C.
    - Hanna H.
    - Michelle H.
    - Mason J.
    - Mackenzie L.
    - Bethany N.
    - Matt R.
- Members not eligible due to two-term limit, for FY 27:
    - Stephan Y.

[5] While Ariel C.'s current position does cover Lewis County, a county completely within CD 3, a review of WSBA data confirmed that only 16 of the 418 "new members" within CD 3 are attached to Lewis County, as of March 2026. Given that accounts for only approximately 3.8% of the new member population of CD 3, WNMC Chair/Charter Project Lead Alex Reaganson determined this link is not substantial enough for outright consideration of an interim appointment to represent CD 3.

[6] The "Home" zip code was determined by a review of the addresses listed on the members' WSBA Directory profiles.

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Andrew Yi, Chair, Court Rules and Procedures Committee
Nicole Gustine, Staff Liaison, Court Rules and Procedures Committee
Emily Crane, Staff Liaison, Court Rules and Procedures Committee

**DATE:** June 1, 2026

**RE:** Proposed Rule Changes to RAP 3.2 from the Court Rules and Procedures Committee

---

**ACTION**: Approve the submission of the Court Rules and Procedures Committee's Proposed Rule Changes to RAP 3.2. to the Washington Supreme Court.

Background

As part of the Supreme Court's rules review cycle, the WSBA Court Rules and Procedures Committee (Committee) is actively reviewing the Criminal Rules for Superior Courts and the Criminal Rules for Courts of Limited Jurisdiction this year. The Committee is separated into subcommittees for each set of rules they are tasked with reviewing. Additionally, the Committee has a "Supreme Court Comment Subcommittee" that reviews the proposed rules currently before the Washington Supreme Court that are published for comment and "Subcommittee X" that considers out-of-cycle rule requests.

Subcommittee X is currently continuing the review of proposed rule changes from the prior fiscal year, including RAP 3.2. This rule change is proposed so that an adverse party is not required to move for substitution of parties in the event of a death or change of status in another party. The proposed language would thus read, "**Duty To Notify ~~Move for Substitution~~**. A party with knowledge of the death or declared legal disability of a party to review, or knowledge of the transfer of a party's interest in the subject matter of the review, shall promptly **suggest the death or other relevant circumstance on the record. A party to review may also** move for substitution of parties. The motion and all other documents must be served on all parties and on the personal representative or successor in interest of a party, within the time and in the manner provided for service on a party. If a party fails to promptly move for substitution, the personal representative of a deceased or legally disabled party, or the successor in interest of a party, should promptly move for substitution of parties." (proposed language in underline and bold, full copy attached).

The proposed amendments add clarification to the existing language to better align with language from existing rules. These changes better align with CR 25, as well as with Federal Rule of Appellate Procedure 43, both of which call for a death to be "suggest[ed] . . . []on the record." We ask that the Board of Governors to approve the submission of these proposed rule changes to RAP 3.2 to be submitted to the Washington Supreme Court.

Stakeholder Input

Subcommittee X reached out to a wide range of stakeholders. No feedback was received in response.

WSBA Risk Analysis
Risk analysis is included in the BOG's confidential materials.

WSBA Fiscal Analysis
The fiscal impact to WSBA resulting from the proposed rule changes is limited primarily to staff time used to draft the rule change language, incorporate the changes into relevant records, and communicate changes to stakeholders. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and does not require additional staff or allocation of resources from other internal sources.

WSBA Equity Analysis
The purpose of the equity analyses is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all. Without having more specific information like how adding clarification and alignment with existing rules will impact those most impacted by the amendment, and what kind of outreach was done and what stakeholders were contacted, it is difficult to do an equity analysis.

Attachment
Suggested Amendments to RAP 3.2

# GR 9 COVER SHEET

## Suggested Amendments
## RAP 3.2
### Submitted by the Washington State Bar Association

---

**A. Name of Proponent:**

WSBA Court Rules and Procedures Committee

**B. Spokesperson:**

Andrew Yi, Chair of the WSBA Court Rules and Procedures Committee

**C. Purpose:**

The primary purposes of the suggested amendments are to revise the rule so that an adverse party is not required to move for substitution of parties in the event of a death or change of status in another party. These changes better align the rule with CR 25, as well as with Federal Rule of Appellate Procedure 43, both of which call for a death to be "suggest[ed] . . . []on the record." The proposed language would thus read, "(b) Duty To **Notify** ~~**Move for Substitution**~~. A party with knowledge of the death or declared legal disability of a party to review, or knowledge of the transfer of a party's interest in the subject matter of the review, **shall promptly suggest the death or other relevant circumstance on the record. A party to review may also** move for substitution of parties. The motion and all other documents must be served on all parties and on the personal representative or successor in interest of a party, within the time and in the manner provided for service on a party. If a party fails to promptly move for substitution, the personal representative of a deceased or legally disabled party, or the successor in interest of a party, should promptly move for substitution of parties." (proposed language in underline and bold).

**D. Hearing:** A hearing is not requested.

**E. Expedited Consideration:** Expedited consideration is not requested.

**RAP 3.2 SUBSTITUTION OF PARTIES**

**(a) No Change**

(b) **Duty To Notify ~~Move for Substitution~~**. A party with knowledge of the death or declared legal disability of a party to review, or knowledge of the transfer of a party's interest in the subject matter of the review, shall promptly suggest the death or other relevant circumstance on the record. A party to review may also move for substitution of parties. The motion and all other documents must be served on all parties and on the personal representative or successor in interest of a party, within the time and in the manner provided for service on a party. If a party fails to promptly move for substitution, the personal representative of a deceased or legally disabled party, or the successor in interest of a party, should promptly move for substitution of parties.

**(c) No Change**

**(d) No Change**

**(e) No Change**

**(f) No Change**



Washington State Bar Association
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WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Renata Garcia, Chief Regulatory Counsel

**DATE:** June 15, 2026

**RE:** New License Type pursuant to United States Servicemember Civil Relief Act

---

**ACTION**: Approve suggested amendments to the APR for submission to the Washington Supreme Court establishing a new lawyer license type to comply with the United States Servicemember Civil Relief Act.

**Background**

The United States Congress enacted the Servicemembers Civil Relief Act (SCRA) to "provide for, strengthen, and expedite the national defense" by enabling servicemembers "to devote their entire energy to the defense needs of the Nation." *See* U.S.C. § 3902(1). In 2023, Congress expanded the SCRA to allow "servicemembers and their spouses to use their professional licenses and certificates when they relocate due to military orders, in certain circumstances." *See* 50 U.S.C. § 4025a. Law licenses were excluded until December 2024, when Congress amended § 4025a. to remove the prior exclusion of law licenses. In keeping with the spirit of the Servicemembers Civil Relief Act, Washington should issue a license to a U.S. servicemember or servicemember's spouse who has an active license to practice law in another jurisdiction when the servicemember relocates to Washington for active duty.

**Suggested New Rule APR 8(g)**

Our proposal is to establish a new time-limited lawyer license type for servicemembers and their spouses who qualify under the SCRA. This license is designed to facilitate rapid authorization to practice in Washington, consistent with the SCRA's expectation that a license be recognized within 30 days of the application. Because the traditional admission process can take several months due to third-party background checks, the SCRA provides a streamlined pathway with fewer pre-admission requirements and no third-party background investigation, resulting in lower investigation fees for the servicemember or spouse. The WSBA will still carry out its internal character and fitness review.

Lawyers who obtain the new SCRA license will have no restrictions on their scope of practice as a lawyer and will be required to comply with the same licensing requirements as an active lawyer member except for compliance with MCLE requirements. They must maintain an active lawyer license in another U.S. jurisdiction and comply with all requirements imposed by that jurisdiction to remain in active status. The license will expire six months after the servicemember leaves active duty in Washington or the lawyer spouse is no longer married to the servicemember. The six-month period allows the lawyer time to adjust to the change in circumstance, whether that involves finalizing or transferring current client matters, finishing a school year for a child, applying to be a member of the WSBA, or managing other transition needs.

**Repeal APR 3(c)(2) Military Spouse Admission by Motion**

Expedited admission by motion for military spouses was introduced to assist lawyers relocating to Washington with their servicemember spouses. This rule was adopted at a time when the SCRA did not apply to law licenses. Because the SCRA now applies to law licenses and covers both the servicemember and the spouse, there will no longer be a need for a separate military spouse admission rule. Since adoption of the rule in 2019, only 22 licenses have been issued.

Although military spouse admission by motion currently results in admission as a member of the WSBA, key requirements were not included in order to assist the military family. The current rule does not have an "active legal experience" requirement nor does it require a third-party background investigation—both of which are required for general admission by motion. Out-of-state lawyers seeking admission as a member of the WSBA should have the same requirements as any other applicant for admission. Therefore, this rule should be repealed upon adoption of the SCRA license.

Information for Fiscal Analysis

We do not expect an increase in revenue from this proposal as demand for the license is based on military relocation orders and even without the proposal they would likely seek admission anyway. There may be some minor expenses related to creating an application for the online admission site.

Information for Equity Analysis

- This proposal reduces barriers or hardships placed on military families when relocating to Washington due to military orders; allowing the lawyer spouse to be able to secure employment without delay and saving the expense of a third-party background check.
- Provides the lawyer with freedom to choose either a temporary license or admission as a WSBA member.

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

The risk analysis is in the BOG's 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 criteria is limited but applies to both revenue and expense. Revenue may be generated through the establishment of the new license type. WSBA's existing fee structures will be applied to any applications and licenses issued. Under current rules, U.S. service members and their spouses who have an active license to practice law who wish to be licensed in Washington must pay an application fee, and if approved, a license fee under the existing process and requirements. As described above, the new license type would be expedited and have slightly different requirements to obtain the license. Therefore, it's possible we may have some increase in the number of people licensed than under the existing rules, which would result in additional revenue. In terms of expenses, the impact includes the cost of staff time used to draft rule change language, incorporate the changes into relevant records and systems, and communicate the criteria to stakeholders. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and does 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 purpose of the equity analysis is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all.

The proposed action has two main parts that are analyzed separately below:

1. The first part of this action will develop a new rule that will allow time-limited license types for U.S. servicemembers and servicemember spouses. This creates a streamlined authorization to practice law in Washington that recognizes the unique circumstances and needs of active duty servicemembers and their spouses.
2. The second part will repeal the existing rule related to admission by motion for military spouses. Very few people (only 22) have been admitted in this way, and it is unclear whether they were engaged in this process. However, in theory the new license type proposed in part 1 of this action will encompass servicemember spouses. Approved alongside the new rule, these changes will allow this group greater freedom of choice to pursue the license type that works for their personal circumstances, while also reducing inconsistencies in requirements for admission by motion that can help strengthen fairness and clarity in process.

Attachments

1. Suggested New Rule APR 8(g) – Markup Copy
2. Suggested Amendments to APR 3(c) – Markup Copy
3. Servicemembers Civil Relief Act, 50 USC § 4025a.

**SUGGESTED NEW RULE 8(g) OF THE ADMISSION AND PRACTICE RULES**

**ADMISSION AND PRACTICE RULES**

**RULE 8. NON-MEMBER LAWYER LICENSES TO PRACTICE LAW**

**(a) – (f)** [Unchanged.]

**(g) Exception under Servicemembers Civil Relief Act.** A lawyer admitted to the practice of law in another state or territory of the United States or the District of Columbia who is an active duty servicemember of the United States Uniformed Services as defined by the United States Department of Defense, or who is the spouse of an active duty servicemember of the United States Uniformed Services, may apply to the Bar for a license to practice law on a temporary basis in this state when the lawyer or the lawyer's spouse relocates residence or will relocate residence because the servicemember received military orders for military service in Washington.

(1) The lawyer shall apply by:

(A) filing an application in the form and manner that may be prescribed by the Bar;

(B) paying the application fees required of lawyer applicants for admission under APR 3;

(C) submitting proof of the servicemember's military orders for military service in Washington;

(D) submitting a copy of the marriage certificate if the applicant is the servicemember's spouse;

(E) furnishing whatever additional information or proof that may be required in the course of investigating the applicant; and

(F) submitting a notarized affidavit affirming, under penalty of perjury, that:

(i) the applicant is the person described and identified in the application;

(ii) all statements made in the application are true and correct and complete;

(iii) the applicant has read and understands the requirements to receive a license in Washington and the scope of practice;



Washington State Bar Association
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(iv) the applicant meets and will comply with all requirements of the license being applied for in Washington;

(v) the applicant is in good standing in all states or territories of the United States or the District of Columbia in which the applicant holds or has held a license to practice law; and

(vi) the applicant has no lawyer disciplinary sanctions and no pending lawyer disciplinary or incapacity matters, investigations, or grievances in any United States jurisdiction in which the applicant has been licensed to practice law.

(2) Upon approval of the application by the Bar, the lawyer shall take the Oath of Attorney, pay the current year's annual license fee and any mandatory assessments in the full amount required of active lawyer members. The Bar shall transmit its recommendation to the Supreme Court which may enter an order granting the lawyer a license to practice law under this section.

(3) A lawyer licensed under this section shall pay to the Bar an annual license fee in the full amount required of active lawyer members and any mandatory assessments required of active lawyer members of the Bar but shall not be a member of the Bar.

(4) The practice of a lawyer licensed under this section shall be subject to the Rules of Professional Conduct, the Rules for Enforcement of Lawyer Conduct, and to all other laws and rules governing lawyers admitted to the active practice of law in this state, except for the requirements of APR 11 relating to mandatory continuing legal education. Jurisdiction shall continue whether or not the lawyer retains the license and irrespective of the residence of the lawyer.

(5) The lawyer shall promptly report to the Bar a change in the servicemember's active duty status in Washington, a change in marital status if the lawyer is the servicemember's spouse, a change in admission or license status in any jurisdiction where the applicant has

been admitted to the practice of law, or the commencement of any formal disciplinary proceeding in any jurisdiction where the applicant has been admitted to the practice of law.

(6) The license granted under this section shall be terminated by the Supreme Court six months after the date when:

(A) the servicemember is no longer on active duty in Washington, or

(B) the lawyer is no longer married to the servicemember if the lawyer is the servicemember's spouse.

(7) The license granted under this section shall be terminated by the Supreme Court when:

(A) the lawyer fails to comply with the terms of this rule,

(B) the lawyer fails to maintain an active license in good standing in at least one other jurisdiction in the United States where the lawyer has been admitted to the practice of law, or

(C) on suspension or disbarment for discipline in any jurisdiction where the lawyer has been admitted to the practice of law.

(8) The license shall be automatically terminated if the lawyer is admitted to the practice of law as a member of the Bar pursuant to APR 3.

**ADMISSION AND PRACTICE RULES**

**RULE 3. APPLICANTS FOR ADMISSION TO PRACTICE LAW**

**(c) Lawyer Admission by Motion.**

(1) Lawyers admitted to practice law in other states or territories of the United States or the District of Columbia are not required to sit for the lawyer bar examination if they:

(A) file a certificate from that jurisdiction certifying the lawyer's admission to practice, and the date thereof, and current good standing or the equivalent; and

(B) present satisfactory proof of active legal experience for at least one of the three years immediately preceding the filing of the application.

~~(2) *Military Spouse Admission by Motion.* A lawyer admitted to practice law in another state or territory of the United States or the District of Columbia who is the spouse of an active duty service member of the United States Uniformed Services, as defined by the United States Department of Defense, is not required to sit for the lawyer bar examination if the applicant meets the following requirements:~~

~~(A) the applicant's spouse is stationed in Washington or will be stationed in Washington within six months of filing the application, and the applicant resides or will reside in Washington as the spouse of that member of the United States Uniformed Services within six months of filing the application;~~

~~(B) the applicant files a certificate from each jurisdiction in which the applicant is admitted certifying the applicant's admission to practice and the date thereof, and current good standing or the equivalent; and~~

~~(C) the applicant has no lawyer disciplinary sanctions or pending lawyer disciplinary or incapacity matters in any jurisdiction in which the applicant has been admitted.~~

DRAFT

Current
<< Previous TITLE 50 / CHAPTER 50 / SUBCHAPTER VII / § 4025a Next >>

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**50 USC 4025a: Portability of professional licenses of servicemembers and their spouses**
Text contains those laws in effect on March 4, 2026

**From Title 50-WAR AND NATIONAL DEFENSE**
CHAPTER 50-SERVICEMEMBERS CIVIL RELIEF
SUBCHAPTER VII-FURTHER RELIEF

**Jump To:**
Source Credit
Miscellaneous
Amendments

## §4025a. Portability of professional licenses of servicemembers and their spouses

### (a) In general

If a servicemember or the spouse of a servicemember has a covered license and relocates residence because such servicemember receives military orders for military service in a State other than the State of the licensing authority that issued the covered license, such covered license shall be considered valid for the scope of practice in the State of the new residence if such servicemember or spouse submits to the licensing authority of such State an application described in subsection (c).

### (b) Temporary licenses

If a licensing authority is required to consider a covered license valid under subsection (a) but cannot carry out such requirement during the 30 days after receiving an application described in subsection (c), the licensing authority may issue to the applicant a temporary license that confers the same rights, privileges, and responsibilities as a permanent license.

### (c) Application

An application described in this subsection includes the following:

(1) Proof of military orders described in subsection (a).
(2) If the applicant is the spouse of a servicemember, a copy of the marriage certificate.
(3) A notarized affidavit affirming, under the penalty of law, that-
(A) the applicant is the person described and identified in the application;
(B) all statements made in the application are true and correct and complete;
(C) the applicant has read and understands the requirements to receive a license, and the scope of practice, of the State of the licensing authority;
(D) the applicant certifies that the applicant meets and shall comply with requirements described in subparagraph (C); and
(E) the applicant is in good standing in all States in which the applicant holds or has held a license.

### (d) Background checks

A licensing authority that receives an application described in subsection (b) may conduct a background check of the applicant before carrying out subsection (a) or (b).

### (e) Interstate compacts

If a servicemember or spouse of a servicemember has a covered license to operate in multiple States pursuant to an interstate compact described in section 1784 of title 10-

(1) the servicemember or spouse of a servicemember shall be subject to the requirements of such compact or the applicable provisions of law of the applicable State; and
(2) this section shall not apply to such servicemember or spouse of a servicemember.

### (f) Definitions

In this section:

(1) The term "covered license" means a professional license that, with respect to a scope of practice- 303

(A) is in good standing with the licensing authority that issued such license;
(B) has not been revoked or had discipline imposed by any State;
(C) does not have an investigation relating to unprofessional conduct pending in any State relating to it; and
(D) has not been voluntarily surrendered while under investigation for unprofessional conduct in any State.

(2) The term "license" means any license, certificate, or other evidence of qualification that an individual is required to obtain before the individual may engage in, or represent himself or herself to be a member of, a particular profession.
(3) The term "licensing authority" means any State board, commission, department, or agency that-
(A) is established in the State for the primary purpose of regulating the entry of persons into or the conduct of persons within, a particular profession; and
(B) is authorized to issue licenses.

(4) The term "military orders" has the meaning given such term in section 3955 of this title.
(5) The term "scope of practice" means the defined parameters of various duties or services that may be provided by an individual under a license.

(Oct. 17, 1940, ch. 888, title VII, §705A, as added Pub. L. 117–333, §19(a), Jan. 5, 2023, 136 Stat. 6137 ; amended Pub. L. 118–159, div. A, title V, §587, Dec. 23, 2024, 138 Stat. 1912 .)

## Editorial Notes

### Amendments

**2024**-Pub. L. 118–159 amended section generally. Prior to amendment, section related to portability of professional licenses of servicemembers and their spouses.

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Renata Garcia de Carvalho, Chief Regulatory Counsel

**DATE:** June 4, 2026

**RE:** Proposed Amendment to the WSBA Admissions Policies Regarding the Deadline for Submitting a Testing-Accommodation Request for the Bar Exam

---

**ACTION**: Presented for adoption are proposed amendments to the WSBA Admissions Policies relating to the deadline for submitting testing-accommodation requests for the NextGen Uniform Bar Exam.

The primary purpose of the proposed amendment is to change the filing deadline for testing-accommodation requests for the NextGen Uniform Bar Exam (NextGen UBE) to align with the current late filing deadlines for bar exam applications.[1]

**Background**

The WSBA provides reasonable and appropriate testing accommodations for bar-exam applicants with disabilities. Currently, requests for testing accommodations must be submitted no later than 80 days before the first day of the exam. WSBA staff, including the Admissions team and Regulatory Counsel, review each request and any supporting documentation submitted by the applicant. If the request cannot be granted immediately with the materials already submitted, WSBA staff will begin an interactive process with the applicant to determine what additional information is needed to evaluate the request. This process could include seeking additional information from the applicant or their treatment provider and consulting a WSBA-contracted specialist. After completing a review of a request, the WSBA notifies the applicant of the testing accommodations granted. For the legacy UBE, the WSBA would also have to order special exam materials from the National Conference of Bar Examiners (NCBE) for some, but not all, applicants granted accommodations.

For the July 2026 NextGen UBE, the WSBA has seen a significant increase in applicants requesting testing accommodations, and the NCBE requires the WSBA to provide the NCBE with accommodation information for all applicants earlier in the process. For these reasons, explained in more detail below, the WSBA is seeking an earlier deadline for applicants to submit their requests for testing accommodations to allow sufficient time to review, engage in the interactive process, and communicate accommodations granted to applicants and the NCBE. This will also give the WSBA more time to assess and procure any specialized equipment requested by applicants, secure and coordinate with venues, and hire proctors.

Below is a table with the current bar-exam application deadlines and the 80-day testing-accommodation request deadlines for the July 2026 NextGen UBE and the February 2027 NextGen UBE:

[1] Summer Bar Exam Late Filing Deadline is April 5. Winter Bar Exam Late Filing Deadline is November 5. Applicants who did not pass the immediately preceding Washington bar exam may file by May 5 for the summer bar exam and by December 5 for the winter bar exam.

| Deadline Type | Summer Bar Exam (July 2026) | Winter Bar Exam (Feb 2027) |
|---|---|---|
| Applications accepted | February 1 | September 1 |
| First Deadline | March 5 | October 5 |
| Late Filing Deadline | April 5 | November 5 |
| Extended Deadline<br>(only for those who failed the immediately preceding exam) | May 5 | December 5 |
| **Testing Accommodation Request Deadline** | **Monday, May 11, 2026** | **Monday, December 7, 2026** |

Changing the filing deadline for testing-accommodation requests for the NextGen UBE to align with the current late filing deadlines for bar exam applications,[2] will give the WSBA approximately one additional month to complete the entire accommodation review and communication process.

**Rationale for Deadline Change**

*Shifting Administrative Deadlines*
Until the recent February 2026 legacy UBE, applicants were required to use the online testing portal provided by an outside vendor contracted by WSBA. This allowed our jurisdiction additional time to work with the vendor to provide applicant information including testing accommodations. However, starting with the July NextGen UBE, WA is required to use the secure, online assessment platform provided by the NCBE. The NCBE requires jurisdictions administering the NextGen UBE to provide the NCBE with information for all applicants, including approved testing accommodations, approximately 45 days prior to the first day of the exam. This requirement enables the NCBE to build applicant portals with the approved accommodations into their online assessment platform prior to the exam. This gives the WSBA less time to complete review of and engage in the interactive process on all testing-accommodations requests.

An earlier deadline for requesting testing accommodations will ensure that the WSBA has sufficient time to 1) review applicants' testing-accommodation requests and communicate with applicants as needed to complete that review; 2) timely communicate all necessary details to the NCBE; and 3) review, confirm and provide any corrections to the accommodations schedules inputted by the NCBE into the online assessment platform prior to the exam.

*Increase in Accommodation Requests*
There has been a significant increase in the number of accommodation requests submitted in recent bar exam cycles.[3] The WSBA had 140 requests for testing accommodations for the upcoming administration of the July NextGen UBE, which is significantly higher than the 82 requests for testing accommodations for the July 2025 legacy UBE in Washington and the 64 requests for July 2024 legacy UBE. As outlined above, WSBA staff must conduct a detailed review of each individual testing-accommodation request and the accompanying supporting documentation (if any) to determine whether the request is complete or requires additional documentation

[2] Summer Bar Exam Late Filing Deadline is April 5. Winter Bar Exam Late Filing Deadline is November 5. Applicants who did not pass the immediately preceding Washington bar exam may file by May 5 for the summer bar exam and by December 5 for the winter bar exam.

[3] The trend in increased testing accommodations is not unique to Washington. *See* Belkin, Douglas, *The Number of Law-School Grad Getting Extra Time for the Bar Exam Is Surging*, The Wall Street Journal (April 5, 2026, 7:00AM), https://www.wsj.com/us-news/education/bar-exam-extra-time-696cfd11

and/or specialist review. Moving the deadline up gives WSBA staff additional time to carefully review each application and engage in the interactive process with applicants as needed on an increasing number of accommodation requests.

**Information for Fiscal Analysis**

To support certain testing-accommodation requests, the Admissions office must order customized exam materials from the NCBE by specific dates. Customized materials are expensive and there are additional costs for orders past the NCBE deadline.

The WSBA also sets aside additional exam rooms in the convention center or nearby hotels for examinees needing reduced-distraction or private rooms. Early application review helps secure better rates for these rooms and prevents unnecessary expenses if accommodation needs change and we no longer require the extra space.

**Information for Equity Analysis**

Regardless of the deadline, the WSBA considers each request for testing accommodation on a case-by-case basis. The WSBA also makes efforts to reasonably accommodate an applicant whose disability arises after the application deadline.

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

Provided as 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 the WSBA resulting from the proposed amendments is limited primarily to staff time used to draft the amendment language, incorporate the amendment into relevant records and systems, and communicate changes to stakeholders. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and does not require additional staff or allocation of resources from other internal sources. Additionally, there may be additional cost savings as mentioned above for testing materials and exam rooms allowed under the current deadlines.

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 analysis is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 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 changes outlined in this proposed action primarily impacts bar applicants with disabilities, who already face heightened barriers to entering and staying in the legal profession. This action has the potential for mixed positive and negative impacts on ensuring equity in the admissions process. The proposed action enables greater time for staff to ensure adequate staff capacity, resources, and compliance with the NCBE requirements to ensure accommodation requests are fulfilled. At the same time, the proposed action shortens the timeline by which those in need of accommodations can gather information and documentation to submit an accommodation request,

potentially causing test-takers going without needed accommodations or feeling discouraged from requesting accommodations if they missed the deadline to submit them. The potential negative impacts of this action may be mitigated if coupled with targeted outreach and engagement with impacted communities.

Attachments

- Admissions Policies Mark-Up Version

**ADMISSIONS POLICIES OF THE WASHINGTON STATE BAR ASSOCIATION**

Under the authority of, and consistent with, the Washington Supreme Court's Admission and Practice Rules (APR), the Board of Governors of the Washington State Bar Association (Bar) has adopted the following Admissions Policies in administering those rules. These policies apply to individuals seeking reinstatement under APR 25 or admission to the Bar as a lawyer, limited practice officer (LPO), house counsel or foreign law consultant. These policies supplement APR 3-5, 8(f), 14 and 20-25. Any discrepancy or conflict between these policies and the APR is unintentional and will be resolved in favor of strict compliance with the APR.

Adopted July 1, 2012. Amended July 28, 2017, amendments effective September 1, 2017.
Amended November 14, 2020, amendments effective December 1, 2020.
Amended January 13, 2022, amendments effective February 1, 2022.
Amended June 9, 2023, amendments effective September 1, 2023.
Amended July 15, 2024, by Court order, amendments effective September 1, 2024.
Correction approved March 21, 2025.
Correction on August 12, 2025, to section X in compliance with APR 3(d).
Amended and correction approved November 14, 2025, amendments effective February 1, 2026.
Amended May 1, 2026, amendments effective May 1, 2026.
Amended May 1, 2026, amendments effective September 1, 2026
Amended June 4, 2026, amendments effective September 1, 2026.

**I. GENERAL PROVISIONS AND DEFINITIONS**
[No Changes.]

**II. APPLICATION REQUIREMENTS**

A. [No Changes]

B. [No Changes]

C. [No Changes]

D. Other Deadlines

Request testing accommodations on bar exam ..... ~~80 days prior to first day of exam.~~ by applicable late filing deadline.*
Request testing accommodations on LPO exam ..... by late filing deadline for the LPO exam.
File all requested and/or additional items ..... 18 days prior to first day of exam.
Character and fitness resolution ..... 18 days prior to first day of exam.
Special requests for exam room..... 18 days prior to first day of exam.
Pay Technology Fee via NCBE Account..... 4 days prior to first day of exam.
Withdraw from exam with partial refund of WSBA application fee..... 18 days prior to first day of exam.
Withdraw from bar exam with NCBE Exam Fee refund only..... 4 days prior to first day of exam.

*Requests for testing accommodation must be submitted by April 5 for the summer bar exam and by November 5 for the winter bar exam; except, applicants who did not pass the immediately preceding bar exam in Washington must submit requests for testing accommodation by May 5 for the summer bar exam and by December 5 for the winter bar exam.

E. [No Changes]

**III. – V. [No Changes]**

**VI. REQUESTS FOR TESTING ACCOMMODATIONS**

Any bar exam applicant requesting testing accommodation for a disability must ask for such accommodation through the online admissions site ~~at least 80 days prior to the examination date.~~ by the applicable late application filing deadline. Any LPO exam applicant requesting testing accommodation for a disability must ask for such accommodation through the online admissions site by the late application filing deadline for that LPO exam. Applicants requesting testing accommodations must provide appropriate documentation of the disability and specify the extent to which they are requesting that the standard testing procedures need to be modified. The applicant is responsible for demonstrating their need for any requested accommodations. The Bar reserves the right to make final judgment concerning testing accommodations and may have any submitted documentation reviewed by a specialist. See the online admissions site for additional information regarding accommodation requests and required documentation.

Any testing accommodation may not compromise the integrity or security of the examination or affect

the standards set for the examination. After the Bar provides notice to an applicant of the testing accommodations granted to that applicant, the applicant must acknowledge that they read and understand the accommodations granted no less than 18 days prior to the first day of the examination.

**VII – XI.** [No Changes]

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Renata Garcia, Chief Regulatory Counsel

Bobby Henry, Associate Director for Regulatory Services

**DATE:** June 15, 2026

**RE:** Proposed Amendments to APR 3(d) & 4(d), and WSBA Bylaws Art. III Sec. D.1.a.3 and Sec. K.5

---

**ACTION**: Approve proposed amendments to the Admission and Practice Rules and the WSBA Bylaws that would eliminate the expiration of bar exam scores and remove the requirement to pass the bar exam for a current WSBA member returning to active status.

Purpose

The purpose for the proposed amendments is to reduce artificial or unnecessary barriers to obtaining an active license to practice law in Washington, for both new applicants and current members seeking to return to active status. The proposed amendments aim to promote consistent competence standards to all individuals seeking to practice law in Washington.

Proposal

The proposed amendments would:

1. remove the 40-month time limit on the validity of a Uniform Bar Exam (UBE) score for purposes of transferring the UBE score earned in another jurisdiction for admission in Washington;
2. remove the time restrictions on the validity of a Multistate Professional Responsibility Exam (MPRE) score for purposes of admission to practice law in Washington; and
3. remove the requirement for a current member to take and pass the bar exam to return to active status when the member has been inactive or suspended for more than ten consecutive years without any active legal experience (as defined in APR 1(e)).

The proposed amendments were discussed at the Board of Governors meeting on May 1, 2026. Concerns were raised about consistent standards for status changes and new admissions, but the proposal addresses this: both new lawyers transferring UBE scores older than six years and current WSBA members returning to active status after more than six years without active legal experience must complete 45 MCLE credits, including the Washington Refresher Course.

Admission by motion is different. It requires only one year of active legal experience; therefore, an additional MCLE requirement is not needed since active practice is already mandatory.

Additional information, including the fiscal, equity, and WSBA risk analyses are included in the attached memo.

Attachments

1. Proposed Amendments to APR 3(d) and 4(d) – Markup
2. Proposed Amendments to the WSBA Bylaws Art. III Sec. D.1.a.3) and Sec. K.5 – Markup
3. BOG Cover Memo, dated April 7, 2026

**ADMISSION AND PRACTICE RULES**

**RULE 3. APPLICANTS FOR ADMISSION TO PRACTICE LAW**

**(a) – (c)** [Unchanged.]

**(d) Lawyer Admission by UBE Score Transfer.** Persons with a Uniform Bar Examination score earned in another state or territory of the United States or the District of Columbia are not required to sit for the lawyer bar examination in Washington if they:

(1) file a transcript demonstrating that the applicant received a UBE score that is equal to or higher than the score required to pass the UBE in Washington~~, and it has been not more than 40 months since the date of the administration of the UBE in which the score was earned; and~~

(2) file a transcript demonstrating that the applicant received an MPRE score equal to or higher than the score required to pass the MPRE in Washington~~, and the score was received no earlier than three years prior to and no later than 40 months after the date of the administration of the UBE in which the applicant received the UBE score.~~; and

(3) complete and report 45 approved MCLE credits of which 15 credits must be from completing the WSBA Washington Law and Practice Refresher CLE course, if it has been more than six years since the date of the exam at which the UBE score was earned.

**(e) – (i)** [Unchanged.]

**RULE 4. EXAMINATIONS FOR ADMISSION; NOTIFICATION OF RESULTS**

**(a) – (c)** [Unchanged.]

**(d) Lawyer Bar Examination.** Unless otherwise provided by these rules, applicants for admission to practice as a lawyer must take and pass the National Conference of Bar Examiners' (NCBE) Uniform Bar Examination (UBE) and Multistate Professional Responsibility Examination (MPRE).



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(1) Washington's minimum passing score for the legacy UBE is 260; the minimum passing score for the NextGen UBE is 610.

(2) Washington's MPRE minimum passing score is 85~~, which must be earned no earlier than three years prior to and no later than 40 months after the date of the administration of the UBE in which the applicant received the minimum passing score~~.

(3) The Bar may disclose the results of the lawyer bar examination to an applicant's law school and the NCBE.

**(e) – (f)** [Unchanged.]

**PROPOSED AMENDMENTS TO THE WSBA BYLAWS**

**I. – II.** [Unchanged.]

**III. MEMBERSHIP**

**A. – C.** [Unchanged.]

**D. CHANGE OF MEMBERSHIP STATUS TO ACTIVE**

1. Members may change membership status as provided below.

**a. Transfer from Inactive to Active.**

1) An Inactive member or Emeritus member may transfer to Active by:

(a) paying an application and/or investigation fee and completing and submitting an application form, all required licensing forms, and any other required information. The fee in this paragraph is not required from an LPO or LLLT who has been inactive for 90 days or less;

(b) paying any MCLE late fees owed;

(c) demonstrating active legal experience as defined in APR 1(e) for at least one year of the three years preceding the filing of the application or completing MCLE requirements as outlined in subsection (d) below. Regardless of demonstrating active legal experience, if the member has been Inactive or a combination of Inactive, Pro Bono, Suspended, or Judicial for one year or less as of the date the application was submitted, and the member was required to report during that time period, then the member must establish MCLE compliance for that reporting period.

(d) completing MCLE requirements as outlined below when a member cannot demonstrate active legal experience as described in subsection (c) above. A member may use MCLE comity to meet the MCLE requirements of this section as provided for in APR 11(c)(6).

i. If the member has been Inactive or a combination of Inactive, Pro Bono, Suspended, or Judicial for one year or less as of the date the application was submitted and the member was not required to report during that time period, or if the member is changing status during their first MCLE reporting period, then the member has no additional MCLE requirements.

ii. If the member has been Inactive or a combination of Inactive, Pro Bono, Suspended, or Judicial for one year or less as of the date the application was

submitted, and the member was required to report during that time period, then the member must establish MCLE compliance for that reporting period.

iii. If the member has been Inactive or a combination of Inactive, Pro Bono, Suspended, or Judicial for more than a year or up to six consecutive years as of the date the application was submitted, then the member must earn and report approved MCLE credits in a number and manner consistent with the requirements for one MCLE reporting period under APR 11 except that the credits required in this section must be earned no earlier than six years prior to the date the application is submitted.

(e) passing a character and fitness review essentially equivalent to that required of all applicants for admission to the Bar, pursuant to APR 20-24.3; and

(f) paying the current Active license fee, including any mandatory assessments, less any license fee (not including late fees) and assessments paid as an Inactive member for the same year.

2) If a member has been Inactive or any combination of Inactive, Pro Bono, or Suspended in Washington for more than six consecutive years as of the date the application was submitted, the member must, in addition to complying with subsection 1(c) or (d) above, complete a reinstatement/readmission course sponsored by the Bar, which must consist of education on law office management and professional responsibility (including the applicable RPC for the member's license type, proper handling of client funds and trust accounts, and client communications), legal research and writing, and changes in the law that apply to the member's license type, as follows:

(a) For lawyer members, a minimum of 15 MCLE credits, consisting of at least four credit hours on law office management and professional responsibility, at least three credit hours on legal research and writing, and the remaining credit hours on recent significant changes in the law;

(b) For LLLT members, a minimum of seven MCLE credits, consisting of at least two credit hours on law office management and professional responsibility, at least one credit hour on legal research and writing, and the remaining credit hours on recent significant changes in the law in approved LLLT practice or core educations areas;

(c) For LPO members, a minimum of seven MCLE credits, consisting of at least two credit hours on professional responsibility, and the remaining credit hours on recent significant changes in the law covered by the approved LPO Study Topics. The MCLE credits earned for the course will apply to the total credits required in subsection 1)(d) above. The member must comply with all registration, payment, attendance, and other

requirements for the course, and will be responsible for submitting proof of completion to the Bar.

~~3) Any member seeking to change to Active who was Inactive or any combination of Suspended and Inactive in Washington and does not have active legal experience as defined in APR 1(e) in any jurisdiction for more than ten consecutive years as of the date the application is submitted, must, in addition to the requirements in Art. III. Sec.D.1.a.(1)(a), (b), (e) and (f) above, take and pass the examinations required for admission to the Bar for the member's license type.~~

~~4~~3) A Disability Inactive status member may be reinstated to Active pursuant to the disciplinary rules applicable to their license type. Before being transferred to Active, after establishing compliance with the disciplinary rules, the member also must comply with the requirements in these Bylaws for Inactive members transferring to Active status.

~~5~~4) A member of any type who has transferred to Inactive status during the pendency of a grievance or disciplinary proceedings may not be transferred to Active except as provided herein and may be subject to such discipline by reason of any grievance or complaint as may be imposed under the ELC, ELPOC, or ELLLTC.

**E. – J.** [Unchanged.]

**K. CHANGING STATUS AFTER SUSPENSION**

1. Upon the completion of an ordered disciplinary or interim suspension, or at any time after entry of an order for an administrative suspension, a suspended member may seek to change status from suspended to any other membership status for which the member qualifies at the time the change in status would occur.

2. Before changing from suspended status, a member who is suspended pursuant to an interim or disciplinary suspension must comply with all requirements imposed by the Washington Supreme Court and/or the applicable disciplinary rules in connection with the disciplinary or interim suspension. Additionally, such member must comply with all other requirements as stated in these Bylaws and in the applicable APR.

3. All requirements associated with each reason for suspension must be met before the change from suspended status can occur.

4. Unless otherwise provided in the applicable APR, a suspended member may seek to change status by: a. paying the required license fee and any assessments for the licensing year in which the status change is sought, for the membership status to which the member is seeking to change. For members seeking to change to Active or any other status from suspension for nonpayment of license fees, the required license fee will be the current year's license fee and assessments, the assessments for the year of suspension, and double the amount of the

delinquent license fee and late fees for the license year that resulted in the member's suspension; b. completing and submitting to the Bar an application for change of status, any required or requested additional documentation, and any required application or investigation fee, and cooperating with any additional character and fitness investigation or hearing that may be required pursuant to APR 20-24.3; c. completing and submitting all licensing forms required for the license year for the membership status to which the member is seeking to change; d. paying any MCLE late fees owed; and e. demonstrating active legal experience as defined in APR 1(e) for at least one year of the three years preceding the filing of the application, or, complying with the MCLE requirements for members returning from Inactive to Active as set forth in Art. III Sec. D.1.a.(1)(d) and D.1.a.2).

~~5. Any member seeking to change to Active who was Suspended or any combination of Suspended and Inactive in Washington and does not have active legal experience as defined in APR 1(e) in any jurisdiction for more than ten consecutive years at the time the application is submitted, must, in addition to the requirements of Art. III, Sec. K.4.(a)-(d), above, take and pass the examinations required for admission to the Bar for the member's license type.~~

**L. – O.** [Unchanged.]

**IV. – XVII.** [Unchanged.]

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Renata Garcia, Chief Regulatory Counsel

Bobby Henry, Associate Director for Regulatory Services

**DATE:** April 7, 2026

**RE:** Proposed Amendments to APR 3(d) & 4(d), and WSBA Bylaws Art. III Sec. D.1.a.3) and Sec. K.5

---

**DISCUSSION & FIRST READ**: Presented for discussion are proposed amendments to the Admission and Practice Rules and the WSBA Bylaws that would eliminate the expiration of bar exam scores and remove the requirement to pass the bar exam for a current WSBA member returning to active status.

Purpose

The purpose for the proposed amendments is to reduce artificial or unnecessary barriers to obtaining an active license to practice law in Washington, for both new applicants and current members seeking to return to active status. The proposed amendments aim to promote consistent competence standards to all individuals seeking to practice law in Washington.

Background

As the WSBA and the Washington Supreme Court are implementing alternative admission pathways and experimental models intended to reduce barriers to licensure and enhance access to justice, it became clear that a full review of existing barriers to practicing law was needed to ensure consistent application of minimum competence standards across every access point to Washington law licensure, particularly for lawyer applicants.

Proposal

The proposed amendments would:

1. remove the 40-month time limit on the validity of a Uniform Bar Exam (UBE) score for purposes of transferring the UBE score earned in another jurisdiction for admission in Washington;
2. remove the time restrictions on the validity of a Multistate Professional Responsibility Exam (MPRE) score for purposes of admission to practice law in Washington; and
3. remove the requirement for a current member to take and pass the bar exam to return to active status when the member has been inactive or suspended for more than ten consecutive years without any active legal experience (as defined in APR 1(e)).

In other words, these amendments would allow a lawyer from another jurisdiction to apply by UBE score transfer regardless of how old the score is. The same applicant, or any applicant for admission as a lawyer, would be able to use their MPRE score regardless of how old the MPRE score is. And, the amendments would remove the burden of passing the bar exam again for a WSBA member seeking to return to active status.

Rationale

Competence, or being able to demonstrate continued competence, to practice law has been the primary reason for establishing expiration dates on the validity of exam scores or for imposing status change requirements such as

attending continuing legal education or retaking the bar exam. The bar exam does not test on all areas of the law nor does it test on all skills a lawyer might need. Rather, the bar exam is an opportunity for the individual to demonstrate minimum competence to practice law as a lawyer. The National Conference of Bar Examiners (NCBE) describes the content scope of the NextGen UBE as "testing the foundational concepts and principles and foundational lawyering skills" for new lawyers.[1]

Should lawyers be required to repeatedly demonstrate their minimum competence to practice law by retaking the bar exam because their original score is too old or they have not practiced law for several years? Once an individual has demonstrated minimum competence and is licensed, they carry an ongoing ethical obligation to provide competent representation. RPC 1.1. Does time away from active practice, by itself, mean that a lawyer no longer possesses the minimum competence to practice law? A lawyer may be out-of-practice or a bit "rusty" on some of the skills and knowledge they had prior but that alone should not prevent them from being able to seek a license to practice law or to return to active status.

Furthermore, the RPC do not dictate a specific method for acquiring or maintaining competence. Rather, the legal profession relies on a lawyer's ethical obligation to maintain and develop "the legal knowledge, skill, thoroughness and preparation reasonably necessary" for competent representation. RPC 1.1. In fact, the RPC explicitly recognize that a lawyer may competently handle a new area of law through adequate study. Comment [2] to RPC 1.1 provides in part, "A lawyer can provide adequate representation in a wholly novel field through necessary study." The same principle should apply to a lawyer returning to practice after a period of inactivity. With appropriate study and preparation, a lawyer who has already demonstrated minimum competence whether by bar exam or other alternative method, such as an experiential portfolio evaluation, can again provide competent representation.

Recognizing that extended periods of time away from the active practice of law may affect a lawyer's sharpness or familiarity with certain skills or areas of law, the proposed amendments require completion of 45 MCLE credits, including a two-day Washington law and practice refresher course, when an individual is seeking to transfer a UBE score from another jurisdiction and that score is more than six years old. This requirement mirrors the existing WSBA Bylaws provision for members returning to active status after six or more years on inactive or suspended status.

Illustrative Scenarios

The following are hypothetical scenarios based on fictitious individuals to help illustrate the inconsistencies that currently exist between the APR and the WSBA Bylaws for applicants for admission or for members returning to active status.

**Sally and Maria**

Sally is admitted to practice law in Washington. Sally raises children for 12 years and does not practice law or work in a position requiring a law license during that time period. Sally, however, maintains active status the entire time. Now that the children are older, Sally wants to practice law again. Sally is able to apply for lawyer jobs or open a law firm even though she has not practiced law for the 12 years since she was admitted.

Maria is admitted to practice law in Washington. Maria also stopped practicing law to raise children for 12 years. Unlike Sally, Maria places her license on inactive status. Now that the children are older, Maria wants to work.

[1] NextGen Content Scope | NCBE

Maria learns she must first retake and pass the bar exam in order to return to active status and practice law because she has been on inactive status for more than ten years without any active legal experience.

**Jessica and Mariko**
Jessica is admitted to practice law in Washington. Jessica decides to take a break from practicing law for six years and places her license on inactive status for the entire six years. Now Jessica wants to return to practicing law. She finds out she simply needs to do 45 MCLE credits, including the refresher course, in order to return to active status.

Mariko is admitted to practice law in Oregon. Mariko earned a 270 on the UBE, which qualifies for admission in Washington. Mariko also takes a break from practicing law for 6 years but she maintains an active license status, including required MCLE, in Oregon the entire time. Due to unforeseen circumstances, Mariko must move to Seattle and wants to return to practicing law. Mariko wants to transfer her UBE score of 270 for admission in Washington but finds out the score is older than the 40 months allowed. Mariko will need to take the bar exam again in order to be admitted in Washington (or go back to Oregon and get one year of active legal experience and apply for admission by motion).

**Alberto and George**
Alberto is admitted to practice law in Washington and Oregon. Alberto accepts a position unrelated to the practice of law and places his Washington license on inactive status, while keeping his Oregon license active. Eleven years later, Alberto takes a lawyer position in a law firm in Oregon and works for one year. Alberto's law firm wants him to return to active status in Washington. Alberto finds out he simply needs to do 45 MCLE credits, including the refresher course, in order to return to active status because he has one year of active legal experience in Oregon.

George is admitted to practice law in Washington. George takes an international policy job in a regulatory environment that involves analyzing rules and regulations but is not considered the practice of law and a law license is not required. George places his license on inactive status. Eleven years later, George wants to seek a lawyer position with a law firm. George finds out he must first retake and pass the bar exam in order to return to active status to use his license to practice law because it has been more than ten years without any active legal experience despite the highly regulatory work of his prior position.

**Bill and Ted**
Bill is seeking admission in Washington by taking the bar exam. Bill took the MPRE while in law school, before sitting for the bar. Because Bill needed multiple attempts to pass the bar exam, his MPRE score is now expired. As a result, Bill must retake and pass the MPRE in order to complete the admission process.

Ted is seeking admission in Washington by motion. Ted is licensed in Wisconsin, a jurisdiction that does not require the MPRE. Because Washington's admission by motion rule does not require submission of an MPRE score, Ted is able to become admitted in Washington without ever having taken the MPRE.

<u>Information for Fiscal Analysis</u>
The proposed amendments have very little financial impact on the WSBA. There will be some small expense for updating the application software with the new list of approved law schools as well as some staff time for communication updates.

Information for Equity Analysis

Adding additional law schools to the approved list reduces barriers and allows more people from diverse backgrounds to enter the legal profession in Washington.

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

The risk analysis is available as confidential materials.

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

The proposed amendments have a fiscal impact on a variety of areas. In terms of costs, there are indirect expenses for staff time dedicated to drafting the proposal, updating applicable records, and disseminating information regarding changes to stakeholders. These tasks fall within the routine responsibilities of current WSBA personnel and will not necessitate additional staffing or significant resources from other internal departments. As noted above, there will likely be a minimal amount of direct expenses to support software updates to the WSBA's admissions system for these amendments. Currently, some individuals keep their active license ($468/year) even if they aren't practicing, to avoid retaking the bar exam. The proposed changes would let them switch to inactive status ($200/year) and later return to active status without needing to retake the exam. While it's hard to predict how many will take this route, it could mean less revenue from license fees. There might also be fewer bar exam applications from those who previously needed to retake the exam, though this probably won't significantly affect overall revenue.

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 analyses is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all.

These amendments appear to reduce inconsistencies in how competence is assessed by the WSBA and reduce barriers for legal professionals seeking to return to the practice of law. These both have great potential to positively increase fair and equal application of admission and practice rules as well as to promote professional diversity and member retention, especially for WSBA members with caregiving responsibilities or other life changes that that may lead to breaks in employment or the practice of law.

Attachments

1. Proposed Amendments to APR 3(d) and 4(d) – Markup
2. Proposed Amendments to the WSBA Bylaws Art. III Sec. D.1.a.3) and Sec. K.5 – Markup

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Renata Garcia, Chief Regulatory Counsel

**DATE:** June 15, 2026

**RE:** Suggested Amendments to APR 3(b)(3) – Qualifications for Common Law Lawyers to Sit for the Bar Exam

---

**ACTION**: Approve suggested amendments to APR 3(b)(3) which eliminate outdated and exclusionary language and reduce the active legal experience required for a lawyer from a common law jurisdiction to sit for the bar exam in Washington.

Rule 3(b)(3) of the Admission and Practice Rules (APR) sets forth the qualifications to sit for the bar exam in Washington for lawyers from a jurisdiction "where the common law of England is the basis of its jurisprudence" and requires the applicant to have active legal experience for at least three of the five years preceding the filing of the application in order to sit for the bar exam.

The suggested amendments accomplish two objectives:

1. remove outdated and exclusionary language: "where the common law of England is the basis of its jurisprudence;" and,
2. reduce the active legal experience requirement for common law lawyers seeking admission by exam to one year out of the last three.

The suggested amendments were discussed at the Board of Governors meeting on May 1, 2026. There was some feedback suggesting that the one year of active legal experience criteria not be limited to lawyers from common law jurisdictions and instead be applied equally to lawyers from all jurisdictions regardless of legal system. There are several different legal systems around the world, including common law, civil law, religious law, socialist law and various pluralist or combination systems. Since this is a complex issue requiring extensive research for a well-informed recommendation, we advise proceeding with the current amendment to meet the GR 9 schedule for submitting rule amendments to the Washington Supreme Court. In the meantime, WSBA staff will continue exploring the inclusion of legal systems outside common law and will provide a recommendation in due course.

Additional information, including the fiscal, equity, and WSBA risk analyses are included in the attached memo.

Attachments

1. Suggested Amendments to APR 3(b)(3) – Markup
2. BOG Cover Memo, dated April 7, 2026

**ADMISSION AND PRACTICE RULES**

**RULE 3. APPLICANTS FOR ADMISSION TO PRACTICE LAW**

**(a)** [Unchanged.]

**(b) Qualification for Lawyer Bar Examination.** To qualify to sit for the lawyer bar examination, a person must not be eligible for admission by motion or UBE score transfer and must present satisfactory proof of:

(1) – (2) [Unchanged.]

(3) graduation from a university or law school in any common law jurisdiction ~~where the common law of England is the basis of its jurisprudence~~ with a degree in law that would qualify the applicant to practice law in that jurisdiction and admission to the practice of law in that same or other common law jurisdiction ~~where the common law of England is the basis of its jurisprudence~~, together with current good standing and active legal experience for at least ~~three~~ one of the ~~five~~ three years immediately preceding the filing of the application; or

(4) [Unchanged.]

**(c) – (i)** [Unchanged.]



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WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Renata Garcia, Chief Regulatory

**DATE:** April 7, 2026

**RE:** Suggested Amendments to APR 3(b)(3) – Qualifications for Common Law Lawyers to Sit for the Bar Exam

---

**DISCUSSION/FIRST READ**: Presented for first read and discussion are suggested amendments to APR 3(b)(3) which eliminate outdated and exclusionary language and reduce the active legal experience required for a lawyer from a common law jurisdiction to sit for the bar exam in Washington.

Rule 3(b)(3) of the Admission and Practice Rules (APR) sets forth the qualifications to sit for the bar exam in Washington for lawyers from a jurisdiction "where the common law of England is the basis of its jurisprudence" and requires the applicant to have active legal experience for at least three of the five years preceding the filing of the application in order to sit for the bar exam.

The suggested amendments accomplish two objectives:

1. Remove outdated and exclusionary language. The suggested amendments move away from archaic and historically rooted reference that is not necessary. The language describing the English common law jurisdiction, "where the common law of England is the basis of its jurisprudence" is now commonly referred to as simply a "common law" jurisdiction. The phrase "common law of England" reflects a colonial framing that is no longer aligned with a modern and global legal profession. The reference also creates ambiguity for applicants about whether English law has any relevance to eligibility to practice law in Washington. Eliminating this reference does not alter the standards for admission, it simply clarifies that the focus is on legal experience practicing in jurisdictions grounded in the common law system, regardless of geographical origin.
2. Aligning the active legal experience standard. The suggested amendments would apply the same standard for active legal experience to common law lawyers taking the bar exam as U.S. lawyers applying for admission by motion. The active legal experience for U.S. lawyers seeking admission by motion (reciprocity) is one year within the three years preceding the application. On the other hand, common law lawyers must have three years of active legal experience within the five years preceding the application simply to qualify to sit for the bar exam. The applicant would still need to pass the exam in order to be admitted. Given this distinction, it seems appropriate to reduce the active legal experience requirement for common law lawyers seeking admission by exam, especially since they are still required to pass the bar exam in order to be admitted.

Information for Fiscal Analysis

Very little fiscal impact. There might be a slight uptick in the number of applications for the bar exam from common law lawyers. There will be some staff time devoted to updating forms, webpages, instructions, etc.

Information for Equity Analysis

See discussion in #1 above. In addition, decreasing the active legal experience reduces barriers for admission to practice law in Washington.

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

The risk analysis is available as confidential materials.

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

The proposed amendments primarily have a fiscal impact on indirect expenses for staff time dedicated to drafting the proposal, updating applicable records, and disseminating information regarding changes to stakeholders. These tasks fall within the routine responsibilities of current WSBA personnel and will not necessitate additional staffing or significant resources from other internal departments. There may also be extra revenue from bar exam applications submitted by candidates who were previously considered ineligible, but this is unlikely to lead to a material increase.

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 analyses is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all.

The proposed amendments to APR3(b)(3) do not appear to present any significant equity concerns. The first change proposed in this action will eliminate unnecessary confusion caused by the reference to the common law of England, which has a net positive effect for all members seeking admission to the WSBA.

The second suggested change in this proposal will eliminate discrepancies in experience requirements between U.S. lawyers and common law lawyers seeking admission to the WSBA. The current rule requires common law lawyer applicants to have three times more active legal experience than U.S. lawyer applicants before they are able to qualify to sit for the bar exam, which they will still be required to pass in order to be admitted to the WSBA. These changes ensure consistency and fairness in evaluating active legal experience between these two types of applicants.

Attachment

Suggested Amendments to APR 3(b)(3) - Markup

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Renata Garcia, Chief Regulatory Counsel

**DATE:** June 15, 2026

**RE:** Suggested Amendments to APR 1(e) – Definition of Active Legal Experience

---

**ACTION**: Approve suggested amendments to APR 1(e) amending the definition of active legal experience.

Rule 1(e) of the Admission and Practice Rules (APR) defines the term "active legal experience." Active legal experience is used primarily for determining the experience required for someone who is applying for admission by motion (reciprocity).

APR 3(c), admission by motion, requires "active legal experience" for at least one of the three years preceding the application for admission. The one year of active legal experience in this case is one of only two substantive requirements to be admitted as a lawyer under this rule; the other being admission and good standing in another U.S. jurisdiction. Accordingly, it is important to have robust, precise standards for determining active legal experience.

The same standard is also used in the WSBA Bylaws for determining whether a WSBA member must satisfy MCLE requirements in order to return to active status. If proposed amendments to the WSBA Bylaws are adopted removing the bar exam requirement to return to active status, then the only consequence of not having enough active legal experience would be completion of additional MCLE credits.

Based on the above, we believe a clear, unambiguous definition best serves new lawyers, WSBA members, and WSBA staff analyzing applications.

The suggested amendments were discussed at the Board of Governors meeting on May 1, 2026. Based on feedback from the governors, there are two changes to the proposed definition of active legal experience.

The first is to include limited licenses to practice law as house counsel in common law jurisdictions as an eligible activity (APR 1(e)(1)(A)(i)c.). Our research found common law jurisdictions with a similar house counsel license as what is available in Washington and other U.S. jurisdictions. In fact, some have even more requirements to qualify than in Washington.

Second, eligible activity f., re judicial law clerks, now includes a provision for completion of a law office study program equivalent to the APR 6 law clerk program. This will allow judicial clerks who complete a law office study program in another U.S. jurisdiction to earn active legal experience.

Additional information, including the fiscal, equity, and WSBA risk analyses are included in the attached memo.

Attachments

1. Suggested Amendments to APR 1(e) – Markup
2. BOG Cover Memo, dated April 7, 2026

**ADMISSION AND PRACTICE RULES**

**RULE 1. IN GENERAL; SUPREME COURT; PREREQUISITES TO THE PRACTICE OF LAW; COMMUNICATIONS TO THE BAR; CONFIDENTIALITY; DEFINITIONS**

**(a) – (d)** [Unchanged.]

**(e) Definitions.** The following definitions apply throughout these Admission and Practice Rules except where otherwise stated:

(1) "Active legal experience"

(A) when used to describe a requirement for admission or licensure as, or otherwise regarding, a lawyer means experience in any combination of the eligible activities listed below. ~~the active practice of law as a lawyer, including practice as a Pro Bono Status Lawyer licensed under APR 3(g), or as a teacher at an approved law school, or as a judge of a court of general or appellate jurisdiction or any combination thereof, in a state or territory of the United States or in the District of Columbia or in any jurisdiction where the common law of England is the basis of its jurisprudence;~~

(i) Eligible activities for "active legal experience" are limited to the following:

a. employment, or volunteer service with a nonprofit organization, in a position that requires an active license to practice law as a lawyer in a state or territory of the United States, the District of Columbia, or any common law jurisdiction;

b. practice as a pro bono status lawyer licensed under APR 3(g) or equivalent lawyer status in another jurisdiction when the practice is in a state or territory of the United States, the District of Columbia, or any common law jurisdiction;

c. practice as house counsel when the house counsel is licensed, registered, or otherwise authorized to practice law as house counsel in a state or territory of the United States, the District of Columbia, or any common law jurisdiction and is admitted as a lawyer

in another state or territory of the United States, the District of Columbia, or any common law jurisdiction;

d. service as a judicial officer in the courts of the United States, any state or territory of the United States, the District of Columbia, any common law jurisdiction, or any federally recognized American Indian tribe or Alaska Native entity and the judicial officer is admitted as a lawyer in a state or territory of the United States, the District of Columbia, or any common law jurisdiction;

e. teacher at a law school approved by the Board of Governors and the teacher is admitted as a lawyer in a state or territory of the United States, the District of Columbia, or any common law jurisdiction;

f. employment as a judicial law clerk at a court of the United States, a state or territory of the United States, the District of Columbia, or any common law jurisdiction where a J.D., or equivalent law degree, or completion of the APR 6 law clerk program, or equivalent law office study program, is required to hold the position, and the clerk is admitted as a lawyer in a state or territory of the United States, the District of Columbia, or any common law jurisdiction; or

g. employment as an arbitrator or mediator in a state or territory of the United States, the District of Columbia, or any common law jurisdiction and the arbitrator or mediator has an active license to practice law as a lawyer in a state or territory of the United States, the District of Columbia, or any common law jurisdiction.

(ii) "Lawyer" for purposes of "active legal experience" means a person admitted, licensed, or otherwise authorized to practice law where the scope of practice is not limited or restricted to particular practice areas or areas of law.

(iii) One year for purposes of determining "active legal experience" is 12 consecutive or nonconsecutive months in which the lawyer regularly engaged in eligible

activities and engaged in eligible activities for at least 1,000 hours during the 12 month period of time.

(iv) Neither the pro se practice of law nor the unauthorized practice of law qualify as active legal experience.

(B) when used to describe a requirement for licensing as, or otherwise regarding, a LLLT, means active experience practicing law as an LLLT, including practice as a Pro Bono Status LLLT licensed under APR 3(g);

(C) when used to describe a requirement for licensing as, or otherwise regarding, a LPO means active experience practicing law as a LPO, including as a Pro Bono Status LPO licensed under APR 3(g).

(2) – (9) [Unchanged.]

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

**FROM:** Renata Garcia, Chief Regulatory

**DATE:** April 7, 2026

**RE:** Suggested Amendments to APR 1(e) – Definition of Active Legal Experience

---

**DISCUSSION & FIRST READ**: Presented for discussion and first read are suggested amendments to APR 1(e) amending the definition of active legal experience.

Rule 1(e) of the Admission and Practice Rules (APR) defines the term "active legal experience." Active legal experience is used primarily for determining the experience required for someone who is applying for admission by motion (reciprocity). APR 3(c), admission by motion, requires "active legal experience" for at least one of the three years preceding the application for admission. The same standard is also used in the WSBA Bylaws for determining whether the member must satisfy MCLE requirements in order to return to active status.

The current definition, taken at its plain meaning as written, significantly restricts what activities can be considered active legal experience. In addition, the definition is vague and confusing. Over the years, the WSBA staff have struggled with interpreting and applying the definition to individual scenarios such as determining whether:

A. a specific activity or job falls under the "active practice of law as a lawyer;"
B. the lawyer must have an active license status (as opposed to inactive or other license status) when engaging in the activity for it to qualify under the definition;
C. a judge of a particular court qualifies under the definition; and
D. the amount of time engaged in the activity is sufficient to qualify as active legal experience.

Such difficulties can result in ambiguity and inconsistent application of the standard. The new definition addresses the above ambiguities by providing a succinct, yet detailed, list of activities that qualify as active legal experience. Each activity identifies the role and clearly sets forth any other requirements such as whether the activity must be undertaken while admitted as a lawyer, with an active license status or other status, and other details relevant to the activity.

The new definition also requires the lawyer to have engaged in the activity for at least 1,000 hours and during a 12-month period of time. This standard ensures the lawyer has regular active legal experience and prevents abuse of the standard by those who might seek to use nominal time to meet the requirement; for example, volunteering only one day a month at a legal clinic. The WSBA reviewed the requirements of other states regarding their standard for demonstrating active legal experience or similar term and found a minimum time requirement to be common among the jurisdictions.

Finally, the new definition explicitly excludes the pro se practice of law and the unauthorized practice of law. There have been rare instances where such experience has been claimed. Including this proviso in the rule provides clear

instruction to an applicant or member and also gives WSBA staff a simple and direct way to point out why such experience does not qualify.

Information for Fiscal Analysis
No fiscal impact. There will be some staff time devoted to updating forms, webpages, instructions, etc.

Information for Equity Analysis
A clear, detailed definition helps everyone understand exactly what qualifies as active legal experience and provides for equal and equitable application of the standard.

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

The risk analysis is available as confidential materials.

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

The proposed amendments primarily have a fiscal impact on indirect expenses for staff time dedicated to drafting the proposal, updating applicable records, and disseminating information regarding changes to stakeholders. These tasks fall within the routine responsibilities of current WSBA personnel and will not necessitate additional staffing or significant resources from other internal departments.

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 analyses is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all.

Based on the materials provided, the suggested amendments to APR 1(e) do not pose any significant equity concerns. The proposed changes will clarify what activities qualify as active legal experience, which would improve procedural fairness by removing administrative discretion required to interpret the current rule, ultimately reducing the potential for inconsistent and/or biased application of admission rules.

Attachments

1. Suggested Amendments to APR 1(e) - Markup

WASHINGTON STATE
BAR ASSOCIATION

# Financial Reports

## (Unaudited)

## Year to Date March 31, 2026

**Prepared by**
**Maggie Yu, Controller**

**Submitted by**
**Tiffany Lynch, Director of Finance**
**April 17, 2026**

# 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 March 31, 2026
As % of Completion to Annual Budget

| | % of Year | Current Year % YTD | Current Year $ Difference Favorable/(Unfavorable) | Prior Year YTD | Comments |
|---|---|---|---|---|---|
| **Total Salaries & Benefits** | **50%** | **51 %** | **$(203,939)** | **50%** | **Unfavorable to budget due to variances in salaries, higher medical cost, and timing of annual payment for transportation allowance.** |
| **Other Indirect Expenses*** | **50%** | **44%** | **$298,373** | **49%** | **Favorable to budget due to timing of expenses for legal fees, workplace benefits, and IT direct expenses.** |
| **Total Indirect Expenses** | **50%** | **50%** | **$94,433** | **50%** | **Favorable to budget resulting from other indirect expenses described above.** |
| **General Fund Revenues** | **50%** | **56%** | **$1,402,082** | **56%** | **Favorable to budget due to higher license revenue from late fees and Law Clerks, and timing of collection of fees for summer bar and LPO exams MCLE, and reimbursement from sections.** |
| **General Fund Indirect Expenses** | **50%** | **50%** | **$97,495** | **50%** | **Favorable to budget as described for indirect expenses above.** |
| **General Fund Direct Expenses** | **50%** | **42%** | **$232,910** | **38%** | **Favorable to budget due to timing of program activities and meetings/events.** |
| **General Fund Net** | **50%** | **-239%** | **$1,732,487** | **-166%** | **Favorable to budget for the reasons described above.** |
| **CLE Revenue** | **50%** | **45%** | **$(78,353)** | **49%** | **Unfavorable to budget primarily due to lower seminar revenue.** |
| **CLE Direct Expenses** | **50%** | **34%** | **$69,445** | **14%** | **Favorable to budget due to timing of expenses for seminar activities.** |
| **CLE Indirect Expenses** | **50%** | **50%** | **$(3,180)** | **51%** | **Unfavorable to budget due to quarterly vacation accrual adjustments.** |
| **CLE Net** | **50%** | **59%** | **$(12,088)** | **199%** | **Unfavorable to budget due to lower seminar revenue as described above.** |

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

**Washington State Bar Association Financial Summary**
**Compared to Fiscal Year 2026 Budget**
**For the Period from March 01, 2026 to March 31, 2026**

| Category | Actual Revenues | Budgeted Revenues | Actual Indirect Expenses | Budgeted Indirect Expenses | Actual Direct Expenses | Budgeted Direct Expenses | Actual Total Expenses | Budgeted Total Expenses | Actual Net Result | Budgeted Net Result |
|---|---|---|---|---|---|---|---|---|---|---|
| Access to Justice | - | - | 122,471 | 253,348 | 26,876 | 116,100 | 149,346 | 369,448 | (149,346) | (369,448) |
| Admissions/Bar Exam | 1,278,535 | 1,479,440 | 525,560 | 1,089,992 | 214,036 | 459,830 | 739,596 | 1,549,822 | 538,939 | (70,382) |
| Advancement FTE | | - | 157,658 | 315,609 | 140 | 6,600 | 157,798 | 322,209 | (157,798) | (322,209) |
| Bar News | 317,543 | 529,600 | 164,899 | 331,526 | 214,226 | 382,945 | 379,125 | 714,471 | (61,582) | (184,871) |
| Board of Governors | - | - | 118,460 | 238,885 | 139,442 | 417,665 | 257,901 | 656,550 | (257,901) | (656,550) |
| Conference & Broadcasting Services | - | - | 41,533 | 83,138 | - | - | 41,533 | 83,138 | (41,533) | (83,138) |
| Character & Fitness Board | - | - | 80,060 | 159,981 | 11,082 | 23,050 | 91,143 | 183,031 | (91,143) | (183,031) |
| Communications Strategies | - | 3,000 | 359,787 | 741,101 | 29,597 | 189,015 | 389,384 | 930,116 | (389,384) | (927,116) |
| Communications Strategies FTE | | - | 130,572 | 257,458 | - | - | 130,572 | 257,458 | (130,572) | (257,458) |
| Discipline | 48,295 | 85,000 | 3,193,423 | 6,614,175 | 86,369 | 185,509 | 3,279,792 | 6,799,684 | (3,231,497) | (6,714,684) |
| Diversity | 135,000 | 135,000 | 155,698 | 342,071 | 10,781 | 59,075 | 166,479 | 401,146 | (31,479) | (266,146) |
| Entity Regulation | 15,000 | 75,500 | 58,088 | 115,083 | 2,021 | 27,973 | 60,109 | 143,055 | (45,109) | (67,555) |
| Facilities & Operations | - | - | 381,971 | 746,702 | 1,188 | 2,565 | 383,159 | 749,267 | (383,159) | (749,267) |
| Finance | 320,276 | 600,000 | 613,906 | 1,225,253 | 3,112 | 4,920 | 617,018 | 1,230,173 | (296,742) | (630,173) |
| Foundation | - | - | 88,391 | 175,440 | 4,869 | 19,185 | 93,261 | 194,625 | (93,261) | (194,625) |
| Human Resources | - | - | 343,016 | 540,066 | - | - | 343,016 | 540,066 | (343,016) | (540,066) |
| Law Clerk Program | 254,967 | 224,000 | 84,874 | 177,416 | 36,789 | 67,409 | 121,663 | 244,825 | 133,304 | (20,825) |
| Legislative | - | - | 131,798 | 270,801 | 13,163 | 24,790 | 144,962 | 295,591 | (144,962) | (295,591) |
| Legal Lunchbox | 30,266 | 34,000 | 29,673 | 59,925 | 4,422 | 8,100 | 34,095 | 68,025 | (3,829) | (34,025) |
| Licensing and Membership Records | 314,115 | 494,260 | 401,600 | 807,725 | 15,409 | 22,680 | 417,009 | 830,405 | (102,894) | (336,145) |
| Licensing Fees | 8,957,902 | 17,652,266 | - | - | - | - | 0 | - | 8,957,902 | 17,652,266 |
| Limited License Legal Technician | 9,003 | 17,287 | 33,525 | 68,332 | 1,304 | 10,000 | 34,829 | 78,332 | (25,826) | (61,045) |
| Limited Practice Officers | 95,530 | 182,000 | 45,544 | 92,656 | 9,282 | 32,704 | 54,826 | 125,360 | 40,704 | 56,640 |
| Mandatory CLE | 830,900 | 1,338,250 | 362,221 | 694,269 | 73,128 | 153,032 | 435,349 | 847,301 | 395,551 | 490,949 |
| Member Wellness Program | 2,000 | 9,000 | 122,327 | 242,930 | 1,633 | 13,100 | 123,960 | 256,030 | (121,960) | (247,030) |
| Member Services & Engagement | 6,000 | 15,300 | 156,323 | 309,044 | 15,056 | 125,020 | 171,380 | 434,064 | (165,380) | (418,764) |
| Mini CLE | - | - | 66,343 | 134,341 | - | - | 66,343 | 134,341 | (66,343) | (134,341) |
| New Member Education | 98,098 | 142,000 | 58,646 | 118,278 | - | 3,700 | 58,646 | 121,978 | 39,452 | 20,022 |
| Office of General Counsel | 1,000 | - | 530,982 | 1,116,772 | 6,789 | 26,750 | 537,771 | 1,143,522 | (536,771) | (1,143,522) |
| Office of the Executive Director | - | - | 471,761 | 932,020 | 110,643 | 142,635 | 582,405 | 1,074,655 | (582,405) | (1,074,655) |
| OGC-Disciplinary Board | - | - | 106,675 | 210,543 | 70,147 | 136,245 | 176,822 | 346,788 | (176,822) | (346,788) |
| Practice of Law Board | - | - | 49,260 | 98,855 | 197 | 16,200 | 49,457 | 115,055 | (49,457) | (115,055) |
| Practice Management Assistance | 39,349 | 62,000 | 77,727 | 152,525 | 89,281 | 95,695 | 167,008 | 248,220 | (127,659) | (186,220) |
| Professional Responsibility Program | - | - | 105,025 | 216,787 | 2,022 | 7,990 | 107,048 | 224,777 | (107,048) | (224,777) |
| Public Service Programs | 2,639 | 132,635 | 138,171 | 310,124 | (3,257) | 12,700 | 134,914 | 322,824 | (132,275) | (190,189) |
| Publication and Design Services | - | - | 61,644 | 124,205 | 4,756 | 5,000 | 66,400 | 129,205 | (66,400) | (129,205) |
| Regulatory Services FTE | | | 205,630 | 425,472 | 1,330 | 12,590 | 206,961 | 438,062 | (206,961) | (438,062) |
| Regulatory Reform | - | - | 84,733 | 167,255 | 8,828 | 57,000 | 93,561 | 224,255 | (93,561) | (224,255) |
| Sections Administration | 388,434 | 275,000 | 160,102 | 322,943 | 407 | 2,400 | 160,510 | 325,343 | 227,925 | (50,343) |
| Volunteer Engagement | - | - | 124,124 | 253,536 | 15,258 | 36,301 | 139,381 | 289,836.58 | (139,381) | (289,837) |
| Technology | - | - | 506,487 | 959,791 | - | - | 506,487 | 959,791 | (506,487) | (959,791) |
| **Subtotal General Fund** | **13,144,851** | 23,485,538 | **10,650,690** | **21,496,370** | **1,220,327** | 2,906,473 | **11,871,017** | 24,402,843 | **1,273,835** | **(917,304)** |
| Expenses using Facilities Reserve funds | | | | | (372) | | (372) | (744) | 372 | 744 |
| Expenses using Special Project Reserve funds | | | (84,733) | | (8,828) | | (93,561) | (224,255) | 93,561 | 224,255 |
| **Total General Fund - Net Result from Operations** | **13,144,851** | | **10,565,957** | | **1,211,499** | | **11,777,084** | **24,177,844** | **1,367,768** | **(692,306)** |
| **Percentage of Budget** | **56%** | | **50%** | | **42%** | | **49%** | | | |
| CLE-Seminars and Products | 686,151 | 1,491,745 | 527,696 | 1,048,807 | 80,183 | 313,153 | 607,879 | 1,361,960 | 78,272 | 129,785 |
| CLE - Deskbooks | 33,928 | 105,120 | 120,891 | 242,008 | 69,138 | 124,380 | 190,029 | 366,387 | (156,101) | (261,267) |
| Total CLE | 720,079 | 1,596,865 | 648,587 | 1,290,814 | 149,321 | 437,533 | 797,908 | 1,728,347 | (77,829) | (131,482) |
| **Percentage of Budget** | **45%** | | **50%** | | **34%** | | **46%** | | - | - |
| Expenses using Facilities Reserve funds | | | | | | | 0 | | **(77,829)** | **(131,482)** |
| **Total CLE Fund - Net Result from Operations** | | | **648,587** | | | | **797,908** | **1,728,347** | | |
| Total All Sections | 649,164 | 653,316 | - | - | 513,243 | 1,091,122 | 513,243 | 1,091,122 | 135,921 | (437,806) |
| Bench Bar Press-Restricted | 6,285 | - | - | - | 4,935 | - | 4,935 | 0 | 1,350 | - |
| Client Protection Fund-Restricted | 818,066 | 945,480 | 97,022 | 194,280 | 16,471 | 507,100 | 113,493 | 701,380 | 704,573 | 244,100 |
| Expenses using Facilities Reserve funds | | | | | | | - | | - | - |
| **Total CPF Fund - Net Result from Operations** | | | **97,022** | | | | **113,493** | **701,380** | **704,573** | **244,100** |
| **Totals** | **15,332,161** | **26,681,199** | **11,396,299** | **22,981,465** | **1,899,362** | **4,942,227** | **13,295,661** | **27,923,692** | **2,037,850** | **(1,242,493)** |
| **Totals Net of Use of Facilities Reserve Funds** | | | - | | (372) | | (372) | | 372 | |
| **Totals Net of Use of Special Project Reserve Funds** | | | (84,733) | | (8,828) | | (93,561) | **27,698,693** | 93,561 | **(1,017,494)** |
| | | | **11,311,566** | | **1,890,534** | | **13,201,728** | | **2,131,783** | |
| **Percentage of Budget** | **57%** | | **50%** | | **38%** | | **48%** | | | |

| Summary of Fund Balances: | Fund Balances Sept. 30, 2025 | 2026 Budgeted Fund Balances | Fund Balances Year to date |
|---|---|---|---|
| ***Restricted Funds:*** | | | |
| Client Protection Fund | 5,307,092 | 5,551,192 | 6,011,665 |
| Bench Bar Press | 1,110 | 1,110 | 2,460 |
| ***Board-Designated Funds (Non-General Fund):*** | | | |
| CLE Fund Balance | 1,233,727 | 1,102,244 | 1,155,898 |
| Section Funds | 2,164,531 | 1,726,725 | 2,300,452 |
| ***Board-Designated Funds (General Fund):*** | | | |
| Operating Reserve Fund | 2,500,000 | 2,500,000 | 2,500,000 |
| Facilities Reserve Fund | 159,925 | 159,181 | 159,553 |
| Special Projects and Innovation Fund | 616,067 | 391,813 | 522,507 |
| ***Unrestricted Funds (General Fund):*** | | | |
| Unrestricted General Fund | 6,754,154 | 6,061,848 | 8,121,922 |
| **Total General Fund Balance** | **10,030,146** | **9,112,841** | **11,303,981** |
| **Net Change in Total General Fund Balance** | | **(917,304)** | **1,273,835** |
| **Total Fund Balance** | **18,736,606** | **17,494,113** | **20,774,456** |
| **Net Change In Fund Balance** | | **(1,242,493)** | **2,037,850** |

Washington State Bar Association
Analysis of Cash Investments
As of March 31, 2026

**Checking & Savings Accounts**

**General Fund**

**Checking**

| Bank | Account | Amount |
|---|---|---|
| Wells Fargo | General | 1,479,940 |
| | Total | |

| Investments | Rate (yield) | Amount |
|---|---|---|
| Wells Fargo Money Market | 3.60% | 19,285,047 |
| UBS Financial Money Market | 3.40% | 1,190,418 |
| CDs/Treasuries | see list | 7,000,000 |
| | **General Fund Total** | **28,955,404** |

**Client Protection Fund**

**Checking**

| Bank | Amount |
|---|---|
| Wells Fargo | 360,315 |

| Investments | Rate (yield) | Amount |
|---|---|---|
| Wells Fargo Money Market | 3.60% | 5,296,575 |
| CDs/Treasuries | see list | 500,000 |
| | **Client Protection Fund Total** | **6,156,890** |
| | **Grand Total Cash & Investments** | **35,112,295** |

Washington State Bar Association
Analysis of Cash Investments
As of March 31, 2026

**General Fund**

| Bank | Yield | Term Months | Trade Date | Settle Date | Maturity Date | Amount |
|---|---|---|---|---|---|---|
| Southstate Bank NA CD | 4.40% | 10 | 6/12/2025 | 6/18/2025 | 4/20/2026 | 250,000 |
| Israel Discount k of NY CD | 4.00% | 12 | 4/22/2025 | 4/28/2025 | 4/28/2026 | 250,000 |
| Northern Bank & Trust MA CD | 4.20% | 9 | 7/28/2025 | 7/30/2025 | 4/30/2026 | 250,000 |
| Citizens N/B Bluffton CD | 4.10% | 10 | 7/28/2025 | 7/31/2025 | 5/29/2026 | 250,000 |
| Merrick Bank CD | 4.30% | 12 | 6/12/2025 | 6/20/2025 | 6/18/2026 | 250,000 |
| Simmons Bank/Pine Bluff CD | 4.20% | 12 | 6/12/2025 | 6/20/2025 | 6/18/2026 | 250,000 |
| Goldman Sachs Bank CD | 3.60% | 6 | 12/30/2025 | 1/6/2026 | 7/6/2026 | 250,000 |
| Bank of America CD | 3.60% | 6 | 12/30/2025 | 1/7/2026 | 7/7/2026 | 250,000 |
| BCB Community Bank NY CD | 4.05% | 12 | 7/7/2025 | 7/18/2025 | 7/17/2026 | 250,000 |
| Bank Hapoalim BM CD | 4.15% | 12 | 7/28/2025 | 7/31/2025 | 7/29/2026 | 250,000 |
| Bridgewater Bank CD | 3.70% | 6 | 1/29/2026 | 2/6/2026 | 8/6/2026 | 250,000 |
| Industrial & Com Bank CD | 3.70% | 6 | 1/29/2026 | 2/6/2026 | 8/6/2026 | 250,000 |
| Morgan Stanley PVT Bank CD | 4.05% | 12 | 8/6/2025 | 8/13/2025 | 8/13/2026 | 250,000 |
| Zions Bancorp NA CD | 3.70% | 9 | 1/29/2026 | 2/4/2026 | 11/4/2026 | 250,000 |
| Cross River Bank CD | 3.70% | 9 | 1/29/2026 | 2/6/2026 | 11/6/2026 | 250,000 |
| JP Morgan chase bank CD | 3.60% | 12 | 12/30/2025 | 1/7/2026 | 1/7/2027 | 250,000 |
| Bank of Baroda CD | 3.70% | 12 | 1/23/2026 | 1/28/2026 | 1/28/2027 | 250,000 |
| Ally Bank/UT CD | 3.60% | 12 | 1/23/2026 | 1/29/2026 | 1/29/2027 | 250,000 |
| BMW Bank North America CD | 3.65% | 12 | 1/23/2026 | 1/30/2026 | 1/29/2027 | 250,000 |
| CAPE & Coast Bank CD | 3.65% | 12 | 1/23/2026 | 1/30/2026 | 1/29/2027 | 250,000 |
| Lake City Bank Warsaw CD | 3.80% | 12 | 2/10/2026 | 2/18/2026 | 2/18/2027 | 250,000 |
| PCB Bank Primary CD | 3.70% | 12 | 2/26/2026 | 3/6/2026 | 3/5/2027 | 250,000 |
| State Bank of India NY CD | 3.75% | 12 | 3/4/2026 | 3/9/2026 | 3/9/2027 | 250,000 |
| Towne Bank Portsmouth VA CD | 3.75% | 12 | 3/4/2026 | 3/13/2026 | 3/12/2027 | 250,000 |
| Associated BK Green Bay CD | 3.80% | 12 | 3/24/2026 | 3/27/2026 | 3/25/2027 | 250,000 |
| First Reliance Bank CD | 3.75% | 12 | 3/24/2026 | 3/30/2026 | 3/30/2027 | 250,000 |
| Ocean Bank/Miami FL CD | 3.85% | 12 | 3/24/2026 | 3/30/2026 | 3/30/2027 | 250,000 |
| Seacoast National Bank CD | 3.80% | 12 | 3/24/2026 | 3/31/2026 | 3/31/2027 | 250,000 |
| | | | | | **Total** | **7,000,000** |

**Client Fund Protection Fund**

| Bank | Yield | Term Months | Trade Date | Settle Date | Maturity Date | Amount |
|---|---|---|---|---|---|---|
| SOFI Bank NA Corp CD | 3.70% | 6 | 1/23/2026 | 2/4/2026 | 8/4/2026 | 250,000 |
| SAFRA National Bank CD | 3.65% | 11 | 1/23/2026 | 1/29/2026 | 12/29/2026 | 250,000 |
| | | | | | **Total** | **500,000** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## LICENSE FEES

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| LICENSE FEES | 17,652,266 | 1,631,824 | 8,957,902 | 8,694,364 | 51% | 131,769 |
| **TOTAL REVENUE:** | **17,652,266** | **1,631,824** | **8,957,902** | **8,694,364** | **51%** | **131,769** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## ADMISSIONS

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| EXAM SOFTWARE REVENUE | 9,500 | - | - | 9,500 | 0% | (4,750) |
| BAR EXAM FEES | 1,395,000 | 383,565 | 1,252,295 | 142,705 | 90% | 554,795 |
| RULE 9/LEGAL INTERN FEES | 13,000 | 850 | 2,650 | 10,350 | 20% | (3,850) |
| SPECIAL ADMISSIONS | 61,940 | 6,660 | 23,590 | 38,350 | 38% | (7,380) |
| **TOTAL REVENUE:** | **1,479,440** | **391,075** | **1,278,535** | **200,905** | **86%** | **538,815** |
| **DIRECT EXPENSES:** | | | | | | |
| POSTAGE | 2,900 | 198 | 2,020 | 880 | 70% | (570) |
| STAFF TRAVEL/PARKING | 24,000 | 607 | 9,139 | 14,861 | 38% | 2,861 |
| STAFF MEMBERSHIP DUES | 495 | - | 245 | 250 | 49% | 3 |
| SUPPLIES | 2,500 | (380) | 1,044 | 1,456 | 42% | 206 |
| FACILITY, PARKING, FOOD | 150,985 | - | 46,969 | 104,016 | 31% | 28,523 |
| EXAM GRADING | 43,750 | - | 21,750 | 22,000 | 50% | 125 |
| UBE EXMINATIONS | 46,200 | 40,859 | 40,859 | 5,341 | 88% | (17,759) |
| BOARD OF BAR EXAMINERS | 45,000 | 5,626 | 6,235 | 38,765 | 14% | 16,265 |
| BAR EXAM PROCTORS | 10,000 | 7,710 | 8,486 | 1,514 | 85% | (3,486) |
| DISABILITY ACCOMMODATIONS | 75,000 | 43,046 | 45,424 | 29,576 | 61% | (7,924) |
| CHARACTER & FITNESS INVESTIGATIONS | 1,500 | - | - | 1,500 | 0% | 750 |
| LAW SCHOOL VISITS | 1,500 | - | 23 | 1,477 | 2% | 727 |
| SOFTWARE HOSTING | 45,000 | 4,583 | 26,488 | 18,512 | 59% | (3,988) |
| STAFF CONFERENCE & TRAINING | 11,000 | - | 5,354 | 5,646 | 49% | 146 |
| **TOTAL DIRECT EXPENSES:** | **459,830** | **102,249** | **214,036** | **245,794** | **47%** | **15,879** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (7.45 FTE) ** | 635,395 | 61,339 | 308,980 | 326,415 | 49% | 8,717 |
| BENEFITS EXPENSE | 198,059 | 20,928 | 104,302 | 93,757 | 53% | (5,273) |
| OTHER INDIRECT EXPENSE | 256,539 | 20,002 | 112,278 | 144,261 | 44% | 15,992 |
| **TOTAL INDIRECT EXPENSES:** | **1,089,992** | **102,269** | **525,560** | **564,433** | **48%** | **19,436** |
| **TOTAL ALL EXPENSES:** | **1,549,822** | **204,518** | **739,596** | **810,226** | **48%** | **35,315** |
| **NET INCOME (LOSS):** | **(70,382)** | **186,557** | **538,939** | **(609,321)** | **-766%** | **574,130** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## ADVANCEMENT FTE

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF CONFERENCE & TRAINING | 6,600 | - | 140 | 6,460 | 2% | 3,160 |
| **TOTAL DIRECT EXPENSES:** | **6,600** | **-** | **140** | **6,460** | **2%** | **3,160** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.41 FTE) | 216,525 | 17,883 | 110,065 | 106,460 | 51% | (1,802) |
| BENEFITS EXPENSE | 50,531 | 4,609 | 26,294 | 24,237 | 52% | (1,028) |
| OTHER INDIRECT EXPENSE | 48,553 | 3,795 | 21,300 | 27,253 | 44% | 2,977 |
| **TOTAL INDIRECT EXPENSES:** | **315,609** | **26,286** | **157,658** | **157,951** | **50%** | **146** |
| **TOTAL ALL EXPENSES:** | **322,209** | **26,286** | **157,798** | **164,410** | **49%** | **3,306** |
| **NET INCOME (LOSS):** | **(322,209)** | **(26,286)** | **(157,798)** | **(164,410)** | **49%** | **3,306** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 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 | - | - | 6,000 | 0% | 3,000 |
| LEADERSHIP TRAINING | 10,000 | - | 3,450 | 6,550 | 34% | 1,550 |
| ATJ BOARD EXPENSE ** | 51,900 | 2,549 | 4,659 | 47,241 | 9% | 21,291 |
| STAFF TRAVEL/PARKING | 2,800 | 59 | 298 | 2,503 | 11% | 1,103 |
| STAFF CONFERENCE & TRAINING | 4,400 | - | 3,662 | 738 | 83% | (1,462) |
| PUBLIC DEFENSE ** | 11,000 | - | 4,106 | 6,894 | 37% | 1,394 |
| RECEPTION/FORUM EXPENSE | 30,000 | 10,601 | 10,701 | 19,299 | 36% | 4,299 |
| **TOTAL DIRECT EXPENSES:** | **116,100** | **13,209** | **26,876** | **89,224** | **23%** | **31,174** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.61 FTE) ** | 152,635 | 15,030 | 74,953 | 77,682 | 49% | 1,365 |
| BENEFITS EXPENSE | 45,272 | 4,098 | 23,065 | 22,207 | 51% | (429) |
| OTHER INDIRECT EXPENSE | 55,440 | 4,326 | 24,452 | 30,988 | 44% | 3,268 |
| **TOTAL INDIRECT EXPENSES:** | **253,348** | **23,454** | **122,471** | **130,877** | **48%** | **4,203** |
| **TOTAL ALL EXPENSES:** | **369,448** | **36,663** | **149,346** | **220,102** | **40%** | **35,378** |
| **NET INCOME (LOSS):** | **(369,448)** | **(36,663)** | **(149,346)** | **(220,102)** | **40%** | **35,378** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## BENCH-BAR-PRESS

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| LUNCHEON REGISTRATION | - | - | 4,485 | (4,485) | | 4,485 |
| BENCH-BAR-PRESS MEMBERSHIP DUES | - | - | 1,800 | (1,800) | | 1,800 |
| **TOTAL REVENUE:** | **-** | **-** | **6,285** | **(6,285)** | | **6,285** |
| **DIRECT EXPENSES:** | | | | | | |
| BENCH-BAR-PRESS LUNCHEON | - | - | 4,935 | (4,935) | | (4,935) |
| **TOTAL DIRECT EXPENSES:** | **-** | **-** | **4,935** | **(4,935)** | | **(4,935)** |
| **NET INCOME (LOSS):** | **-** | **-** | **1,350** | **(1,350)** | | **1,350** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 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% | (1,000) |
| BNEWS DISPLAY ADVERTISING | 405,000 | 50,000 | 254,289 | 150,711 | 63% | 51,789 |
| BNEWS SUBSCRIPT/SINGLE ISSUES | 100 | 36 | 140 | (40) | 140% | 90 |
| BNEWS CLASSIFIED ADVERTISING | 2,500 | (32) | 2,773 | (273) | 111% | 1,523 |
| JOB TARGET ADVERSTISING | 120,000 | 12,351 | 60,340 | 59,660 | 50% | 340 |
| **TOTAL REVENUE:** | **529,600** | **62,355** | **317,543** | **212,057** | **60%** | **52,743** |
| **DIRECT EXPENSES:** | | | | | | |
| POSTAGE | 135,000 | 16,369 | 82,591 | 52,409 | 61% | (15,091) |
| PRINTING, COPYING & MAILING | 242,000 | 26,386 | 130,615 | 111,385 | 54% | (9,615) |
| DIGITAL/ONLINE DEVELOPMENT | 2,000 | 21 | 21 | 1,979 | 1% | 979 |
| GRAPHICS/ARTWORK | 1,000 | - | - | 1,000 | 0% | 500 |
| EDITORIAL ADVIS COMMITTEE EXP | 300 | - | - | 300 | 0% | 150 |
| STAFF CONFERENCE & TRAINING | 2,200 | - | 999 | 1,201 | 45% | 101 |
| STAFF MEMBERSHIP DUES | 220 | - | - | 220 | 0% | 110 |
| SUBSCRIPTIONS | 225 | - | - | 225 | 0% | 113 |
| **TOTAL DIRECT EXPENSES:** | **382,945** | **42,775** | **214,226** | **168,719** | **56%** | **(22,753)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.13 FTE) | 199,151 | 17,535 | 101,776 | 97,375 | 51% | (2,200) |
| BENEFITS EXPENSE | 59,029 | 5,472 | 30,950 | 28,079 | 52% | (1,436) |
| OTHER INDIRECT EXPENSE | 73,346 | 5,732 | 32,173 | 41,173 | 44% | 4,500 |
| **TOTAL INDIRECT EXPENSES:** | **331,526** | **28,739** | **164,899** | **166,627** | **50%** | **864** |
| **TOTAL ALL EXPENSES:** | **714,471** | **71,515** | **379,125** | **335,346** | **53%** | **(21,889)** |
| **NET INCOME (LOSS):** | **(184,871)** | **(9,160)** | **(61,582)** | **(123,289)** | **33%** | **30,853** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 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 ** | 175,000 | 32,474 | 46,003 | 128,997 | 26% | 41,497 |
| BOG COMMITTEES' EXPENSES ** | 11,200 | 973 | 2,305 | 8,895 | 21% | 3,295 |
| BOG RETREAT | 40,000 | 174 | 31,539 | 8,461 | 79% | (11,539) |
| BOG CONFERENCE ATTENDANCE | 56,500 | 6,098 | 16,727 | 39,773 | 30% | 11,523 |
| BOG TRAVEL & OUTREACH ** | 70,000 | 5,329 | 42,518 | 27,482 | 61% | (7,518) |
| LEADERSHIP TRAINING | 15,000 | - | - | 15,000 | 0% | 7,500 |
| BOG ELECTIONS ** | 26,900 | - | - | 26,900 | 0% | 13,450 |
| PRESIDENT'S DINNER | 12,000 | - | - | 12,000 | 0% | 6,000 |
| NEW GOVERNOR ORIENTATION | 7,000 | - | - | 7,000 | 0% | 3,500 |
| PRESIDENT'S PHOTO | 3,300 | - | - | 3,300 | 0% | 1,650 |
| SUPPLIES | 765 | 150 | 350 | 415 | 46% | 33 |
| **TOTAL DIRECT EXPENSES:** | **417,665** | **45,198** | **139,442** | **278,223** | **33%** | **69,391** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.73 FTE) | 135,043 | 12,558 | 69,091 | 65,953 | 51% | (1,569) |
| BENEFITS EXPENSE | 44,269 | 4,143 | 23,372 | 20,897 | 53% | (1,237) |
| OTHER INDIRECT EXPENSE | 59,572 | 4,631 | 25,997 | 33,575 | 44% | 3,789 |
| **TOTAL INDIRECT EXPENSES:** | **238,885** | **21,332** | **118,460** | **120,425** | **50%** | **983** |
| **TOTAL ALL EXPENSES:** | **656,550** | **66,530** | **257,901** | **398,649** | **39%** | **70,374** |
| **NET INCOME (LOSS):** | **(656,550)** | **(66,530)** | **(257,901)** | **(398,649)** | **39%** | **70,374** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## CONFERENCE AND BROADCAST SERVICES

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.55 FTE) | 49,269 | 4,401 | 25,327 | 23,942 | 51% | (693) |
| BENEFITS EXPENSE | 14,930 | 1,382 | 7,893 | 7,037 | 53% | (428) |
| OTHER INDIRECT EXPENSE | 18,939 | 1,481 | 8,314 | 10,625 | 44% | 1,156 |
| TOTAL INDIRECT EXPENSES: | **83,138** | **7,264** | **41,533** | **41,604** | **50%** | **36** |
| NET INCOME (LOSS): | **(83,138)** | **(7,264)** | **(41,533)** | **(41,604)** | **50%** | **36** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## CHARACTER & FITNESS BOARD

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| CHARACTER & FITNESS BOARD EXP | 12,000 | 1,333 | 5,139 | 6,861 | 43% | 861 |
| COURT REPORTERS | 11,050 | 1,708 | 5,943 | 5,107 | 54% | (418) |
| **TOTAL DIRECT EXPENSES:** | **23,050** | **3,040.66** | **11,082** | **11,968** | **48%** | **443** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.85 FTE) | 103,891 | 9,042 | 53,242 | 50,649 | 51% | (1,296) |
| BENEFITS EXPENSE | 26,820 | 2,454 | 14,044 | 12,776 | 52% | (634) |
| OTHER INDIRECT EXPENSE | 29,270 | 2,276 | 12,775 | 16,495 | 44% | 1,860 |
| TOTAL INDIRECT EXPENSES: | **159,981** | **13,772** | **80,060** | **79,921** | **50%** | **(70)** |
| **TOTAL ALL EXPENSES:** | **183,031** | **16,813** | **91,143** | **91,888** | **50%** | **373** |
| **NET INCOME (LOSS):** | **(183,031)** | **(16,813)** | **(91,143)** | **(91,888)** | **50%** | **373** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## CONTINUING LEGAL EDUCATION (CLE)

**(CLES - CLEP)**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| SEMINAR REGISTRATIONS | 730,535 | 11,047 | 151,283 | 579,252 | 21% | (213,985) |
| SEMINAR REVENUE-OTHER | 32,500 | - | 16,000 | 16,500 | 49% | (250) |
| SEMINAR SPLITS W/ CLE | (150,000) | - | - | (150,000) | 0% | 75,000 |
| SHIPPING & HANDLING | 210 | 9 | 36 | 174 | 17% | (69) |
| COURSEBOOK SALES | 3,500 | 70 | 325 | 3,175 | 9% | (1,425) |
| DIGITAL VIDEO SALES | 875,000 | 39,752 | 518,507 | 356,493 | 59% | 81,007 |
| **TOTAL REVENUE:** | **1,491,745** | **50,878** | **686,151** | **805,594** | **46%** | **(59,722)** |
| **DIRECT EXPENSES:** | | | | | | |
| COURSEBOOK PRODUCTION | 150 | - | - | 150 | 0% | 75 |
| ONLINE EXPENSES | 54,000 | 6 | 17,851 | 36,149 | 33% | 9,149 |
| ACCREDITATION FEES | 2,500 | (60) | 2,040 | 460 | 82% | (790) |
| FACILITIES | 175,000 | 1,200 | 47,107 | 127,893 | 27% | 40,393 |
| DISABILITY ACCOMMODATIONS | 7,000 | - | 2,211 | 4,789 | 32% | 1,289 |
| SPEAKERS & PROGRAM DEVELOP | 45,700 | 200 | 6,666 | 39,034 | 15% | 16,184 |
| HONORARIA | 3,000 | - | - | 3,000 | 0% | 1,500 |
| CLE SEMINAR COMMITTEE | 200 | - | - | 200 | 0% | 100 |
| STAFF TRAVEL/PARKING | 16,500 | - | 2,721 | 13,779 | 16% | 5,529 |
| STAFF CONFERENCE & TRAINING | 3,700 | - | - | 3,700 | 0% | 1,850 |
| STAFF MEMBERSHIP DUES | 1,500 | - | 1,091 | 409 | 73% | (341) |
| SUBSCRIPTIONS | 1,300 | - | - | 1,300 | 0% | 650 |
| SUPPLIES | 1,000 | - | 41 | 959 | 4% | 459 |
| COST OF SALES - COURSEBOOKS | 300 | 2 | 27 | 273 | 9% | 123 |
| POSTAGE & DELIVERY-COURSEBOOKS | 200 | 6 | 28 | 172 | 14% | 72 |
| IT EXPENSE DUE TO GF | 1,103 | 74 | 400 | 703 | 36% | 151 |
| **TOTAL DIRECT EXPENSES:** | **313,153** | **1,427** | **80,183** | **232,970** | **26%** | **76,393** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (7.95 FTE) | 614,468 | 53,435 | 315,786 | 298,682 | 51% | (8,552) |
| BENEFITS EXPENSE | 202,492 | 18,840 | 107,373 | 95,119 | 53% | (6,127) |
| OTHER INDIRECT EXPENSE | 231,847 | 18,513 | 104,537 | 127,310 | 45% | 11,386 |
| **TOTAL INDIRECT EXPENSES:** | **1,048,807** | **90,789** | **527,696** | **521,111** | **50%** | **(3,292)** |
| **TOTAL ALL EXPENSES:** | **1,361,960** | **92,216** | **607,879** | **754,081** | **45%** | **73,101** |
| **NET INCOME (LOSS):** | **129,785** | **(41,338)** | **78,272** | **51,513** | **60%** | **13,379** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## CLIENT PROTECTION FUND

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| DONATIONS | - | - | 4,500 | (4,500) | | 4,500 |
| CPF RESTITUTION | 10,000 | 621 | 3,352 | 6,648 | 34% | (1,648) |
| CPF MEMBER ASSESSMENTS | 735,480 | 17,920 | 711,290 | 24,190 | 97% | 343,550 |
| INTEREST INCOME | 200,000 | 15,735 | 98,924 | 101,076 | 49% | (1,076) |
| **TOTAL REVENUE:** | **945,480** | **34,276** | **818,066** | **127,414** | **87%** | **345,326** |
| **DIRECT EXPENSES:** | | | | | | |
| BANK FEES | 500 | (24) | (94) | 594 | -19% | 344 |
| GIFTS TO INJURED CLIENTS | 500,000 | 12,000 | 15,700 | 484,300 | 3% | 234,300 |
| CPF BOARD EXPENSES | 2,000 | 132 | 864 | 1,136 | 43% | 136 |
| STAFF CONFERENCE & TRAINING | 4,400 | - | - | 4,400 | 0% | 2,200 |
| STAFF MEMBERSHIP DUES | 200 | - | - | 200 | 0% | 100 |
| **TOTAL DIRECT EXPENSES:** | **507,100** | **12,108** | **16,471** | **490,630** | **3%** | **237,080** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.23 FTE) | 117,501 | 9,159 | 60,510 | 56,990 | 51% | (1,760) |
| BENEFITS EXPENSE | 34,425 | 3,175 | 17,984 | 16,441 | 52% | (771) |
| OTHER INDIRECT EXPENSE | 42,355 | 3,301 | 18,529 | 23,826 | 44% | 2,649 |
| **TOTAL INDIRECT EXPENSES:** | **194,280** | **15,635** | **97,022** | **97,258** | **50%** | **118** |
| **TOTAL ALL EXPENSES:** | **701,380** | **27,743** | **113,493** | **587,887** | **16%** | **237,197** |
| **NET INCOME (LOSS):** | **244,100** | **6,534** | **704,573** | **(460,473)** | **289%** | **582,523** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 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 | 1,000 | - | - | 1,000 | 0% | (500) |
| WSBA LOGO MERCHANDISE SALES | 2,000 | - | - | 2,000 | 0% | (1,000) |
| **TOTAL REVENUE:** | **3,000** | **-** | **-** | **3,000** | **0%** | **(1,500)** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 5,895 | 198 | 1,188 | 4,707 | 20% | 1,760 |
| STAFF MEMBERSHIP DUES | 1,800 | - | 537 | 1,263 | 30% | 363 |
| SUBSCRIPTIONS | 4,520 | 227 | 1,157 | 3,363 | 26% | 1,103 |
| APEX | 52,500 | 380 | 380 | 52,120 | 1% | 25,870 |
| BAR LEADERS SUMMIT | 35,000 | - | - | 35,000 | 0% | 17,500 |
| 50 YEAR MEMBER TRIBUTE LUNCH | 38,000 | - | - | 38,000 | 0% | 19,000 |
| BAR OUTREACH | 15,000 | 2,370 | 15,730 | (730) | 105% | (8,230) |
| COMMUNICATIONS OUTREACH | 15,000 | 703 | 2,814 | 12,186 | 19% | 4,686 |
| STAFF CONFERENCE & TRAINING | 11,300 | - | 7,791 | 3,510 | 69% | (2,141) |
| AMBASSADOR TRAINING & TOWN HALLS | 10,000 | - | - | 10,000 | 0% | 5,000 |
| **TOTAL DIRECT EXPENSES:** | **189,015** | **3,878** | **29,597** | **159,418** | **16%** | **64,910** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (5.39 FTE) | 417,995 | 34,172 | 206,485 | 211,510 | 49% | 2,512 |
| BENEFITS EXPENSE | 137,502 | 12,779 | 72,116 | 65,386 | 52% | (3,365) |
| OTHER INDIRECT EXPENSE | 185,603 | 14,463 | 81,186 | 104,418 | 44% | 11,616 |
| **TOTAL INDIRECT EXPENSES:** | **741,101** | **61,414** | **359,787** | **381,314** | **49%** | **10,763** |
| **TOTAL ALL EXPENSES:** | **930,116** | **65,293** | **389,384** | **540,731** | **42%** | **75,674** |
| **NET INCOME (LOSS):** | **(927,116)** | **(65,293)** | **(389,384)** | **(537,731)** | **42%** | **74,174** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## COMMUNICATION STRATEGIES FTE

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.00 FTE) | 183,193 | 16,851 | 94,767 | 88,426 | 52% | (3,171) |
| BENEFITS EXPENSE | 39,830 | 3,628 | 20,681 | 19,149 | 52% | (766) |
| OTHER INDIRECT EXPENSE | 34,435 | 2,694 | 15,124 | 19,311 | 44% | 2,094 |
| TOTAL INDIRECT EXPENSES: | **257,458** | **23,174** | **130,572** | **126,886** | **51%** | **(1,843)** |
| NET INCOME (LOSS): | **(257,458)** | **(23,174)** | **(130,572)** | **(126,886)** | **51%** | **(1,843)** |

# Washington State Bar Association

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For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## DESKBOOKS

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| DESKBOOK SALES | 5,120 | 3,386 | 3,386 | 1,734 | 66% | 826 |
| LEXIS/NEXIS ROYALTIES | 75,000 | 9,056 | 20,594 | 54,406 | 27% | (16,906) |
| SECTION PUBLICATION SALES | - | 70 | 70 | (70) | | 70 |
| CASEMAKER ROYALTIES | 25,000 | - | 9,878 | 15,122 | 40% | (2,622) |
| **TOTAL REVENUE:** | **105,120** | **12,512** | **33,928** | **71,192** | **32%** | **(18,632)** |
| **DIRECT EXPENSES:** | | | | | | |
| COST OF SALES - DESKBOOKS | 2,800 | 1,130 | 1,195 | 1,605 | 43% | 205 |
| DESKBOOK ROYALTIES | - | - | 193 | (193) | | (193) |
| STAFF CONFERENCES & TRAINING | 2,200 | - | 1,914 | 286 | 87% | (814) |
| POSTAGE & DELIVERY-DESKBOOKS | 300 | - | 21 | 279 | 7% | 129 |
| OBSOLETE INVENTORY | 118,700 | 65,597 | 65,597 | 53,103 | 55% | (6,247) |
| STAFF MEMBERSHIP DUES | 330 | - | 218 | 112 | 66% | (53) |
| SUBSCRIPTIONS | 50 | - | - | 50 | 0% | 25 |
| **TOTAL DIRECT EXPENSES:** | **124,380** | **66,727** | **69,138** | **55,242** | **56%** | **(6,948)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.75 FTE) | 145,047 | 13,461 | 73,735 | 71,312 | 51% | (1,212) |
| BENEFITS EXPENSE | 45,925 | 4,276 | 24,091 | 21,834 | 52% | (1,128) |
| OTHER INDIRECT EXPENSE | 51,036 | 4,085 | 23,065 | 27,970 | 45% | 2,453 |
| **TOTAL INDIRECT EXPENSES:** | **242,008** | **21,822** | **120,891** | **121,117** | **50%** | **113** |
| **TOTAL ALL EXPENSES:** | **366,387** | **88,549** | **190,029** | **176,358** | **52%** | **(6,835)** |
| **NET INCOME (LOSS):** | **(261,267)** | **(76,037)** | **(156,101)** | **(105,166)** | **60%** | **(25,467)** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## DISCIPLINE

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| AUDIT REVENUE | 1,000 | 85 | 914 | 86 | 91% | 414 |
| RECOVERY OF DISCIPLINE COSTS | 65,000 | 1,897 | 35,441 | 29,559 | 55% | 2,941 |
| DISCIPLINE HISTORY SUMMARY | 19,000 | 1,920 | 11,940 | 7,060 | 63% | 2,440 |
| **TOTAL REVENUE:** | **85,000** | **3,902** | **48,295** | **36,705** | **57%** | **5,795** |
| **DIRECT EXPENSES:** | | | | | | |
| PUBLICATIONS PRODUCTION | 350 | - | - | 350 | 0% | 175 |
| STAFF TRAVEL/PARKING | 15,000 | 3,085 | 9,548 | 5,452 | 64% | (2,048) |
| STAFF MEMBERSHIP DUES | 7,659 | 300 | 7,456 | 203 | 97% | (3,627) |
| TELEPHONE | 3,000 | 199 | 1,191 | 1,809 | 40% | 309 |
| COURT REPORTERS | 66,200 | 2,777 | 24,357 | 41,843 | 37% | 8,743 |
| OUTSIDE COUNSEL/AIC | 500 | - | - | 500 | 0% | 250 |
| LITIGATION EXPENSES | 30,000 | 2,253 | 7,710 | 22,290 | 26% | 7,290 |
| DISABILITY EXPENSES | 15,000 | - | 4,696 | 10,304 | 31% | 2,804 |
| TRANSLATION SERVICES | 10,000 | 1,247 | 8,190 | 1,810 | 82% | (3,190) |
| STAFF CONFERENCE & TRAINING | 37,800 | 3,068 | 23,220 | 14,580 | 61% | (4,320) |
| **TOTAL DIRECT EXPENSES:** | **185,509** | **12,928** | **86,369** | **99,140** | **47%** | **6,386** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (39.00 FTE) | 4,131,360 | 378,591 | 2,017,777 | 2,113,583 | 49% | 47,903 |
| BENEFITS EXPENSE | 1,139,859 | 104,706 | 588,371 | 551,489 | 52% | (18,441) |
| OTHER INDIRECT EXPENSE | 1,342,955 | 104,623 | 587,275 | 755,680 | 44% | 84,202 |
| **TOTAL INDIRECT EXPENSES:** | **6,614,175** | **587,921** | **3,193,423** | **3,420,752** | **48%** | **113,665** |
| **TOTAL ALL EXPENSES:** | **6,799,684** | **600,848** | **3,279,792** | **3,519,892** | **48%** | **120,050** |
| **NET INCOME (LOSS):** | **(6,714,684)** | **(596,946)** | **(3,231,497)** | **(3,483,187)** | **48%** | **125,845** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## DIVERSITY

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| DONATIONS | 135,000 | - | 135,000 | - | 100% | 67,500 |
| **TOTAL REVENUE:** | **135,000** | **-** | **135,000** | **-** | **100%** | **67,500** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 3,700 | 106 | 394 | 3,306 | 11% | 1,456 |
| STAFF MEMBERSHIP DUES | 775 | 50 | 430 | 345 | 55% | (43) |
| DEI COUNCIL | 7,600 | - | 1,917 | 5,683 | 25% | 1,883 |
| DIVERSITY EVENTS & PROJECTS ** | 33,600 | 150 | 5,091 | 28,509 | 15% | 11,709 |
| STAFF EQUITY LEADERSHIP LAB | 6,000 | 1,010 | 2,949 | 3,051 | 49% | 51 |
| STAFF CONFERENCE & TRAINING | 4,400 | - | - | 4,400 | 0% | 2,200 |
| CONSULTING SERVICES | 3,000 | - | - | 3,000 | 0% | 1,500 |
| **TOTAL DIRECT EXPENSE:** | **59,075** | **1,316** | **10,781** | **48,294** | **18%** | **18,756** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.24 FTE) ** | 198,124 | 18,583 | 88,344 | 109,780 | 45% | 10,718 |
| BENEFITS EXPENSE | 66,814 | 5,514 | 30,944 | 35,869 | 46% | 2,462 |
| OTHER INDIRECT EXPENSE | 77,134 | 6,000 | 36,410 | 40,724 | 47% | 2,157 |
| **TOTAL INDIRECT EXPENSES:** | **342,071** | **30,097** | **155,698** | **186,373** | **46%** | **15,338** |
| **TOTAL ALL EXPENSES:** | **401,146** | **31,413** | **166,479** | **234,667** | **42%** | **34,094** |
| **NET INCOME (LOSS):** | **(266,146)** | **(31,413)** | **(31,479)** | **(234,667)** | **12%** | **101,594** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

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**50% OF YEAR COMPLETE**

## ENTITY REGULATION

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| APPLICATION FEES | 28,000 | 7,000 | 15,000 | 13,000 | 54% | 1,000 |
| ANNUAL FEES | 47,500 | - | - | 47,500 | 0% | (23,750) |
| **TOTAL REVENUE:** | **75,500** | **7,000** | **15,000** | **60,500** | **20%** | **(22,750)** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF CONFERENCE & TRAINING | 4,400 | - | 1,551 | 2,849 | 35% | 649 |
| INVESTIGATION | 9,600 | - | - | 9,600 | 0% | 4,800 |
| OUTREACH & COMMUNICATION | 10,000 | - | - | 10,000 | 0% | 5,000 |
| SOFTWARE HOSTING | 3,973 | 81 | 471 | 3,502 | 12% | 1,516 |
| **TOTAL DIRECT EXPENSES:** | **27,973** | **81** | **2,021** | **25,951** | **7%** | **11,965** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.55 FTE) ** | 77,471 | 7,436 | 39,987 | 37,484 | 52% | (1,251) |
| BENEFITS EXPENSE | 18,673 | 1,724 | 9,787 | 8,886 | 52% | (451) |
| OTHER INDIRECT EXPENSE | 18,939 | 1,481 | 8,314 | 10,625 | 44% | 1,156 |
| **TOTAL INDIRECT EXPENSES:** | **115,083** | **10,640** | **58,088** | **56,995** | **50%** | **(546)** |
| **TOTAL ALL EXPENSES:** | **143,055** | **10,722** | **60,109** | **82,947** | **42%** | **11,419** |
| **NET INCOME (LOSS):** | **(67,555)** | **(3,722)** | **(45,109)** | **(22,447)** | **67%** | **(11,331)** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

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For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 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 | 9,000 | - | 2,000 | 7,000 | 22% | (2,500) |
| ROYALTIES | 62,000 | - | 39,349 | 22,651 | 63% | 8,349 |
| **TOTAL REVENUE:** | **71,000** | **-** | **41,349** | **29,651** | **58%** | **5,849** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF MEMBERSHIP DUES | 1,385 | - | 890 | 495 | 64% | (198) |
| MEMBER WELLNESS COUNCIL | 4,500 | 39 | 39 | 4,461 | 1% | 2,211 |
| LEGAL TECH TASK FORCE | 3,500 | - | - | 3,500 | 0% | 1,750 |
| STAFF TRAVEL/PARKING | 7,700 | 327 | 2,391 | 5,309 | 31% | 1,459 |
| STAFF CONFERENCE & TRAINING | 10,300 | 563 | 1,142 | 9,158 | 11% | 4,008 |
| SUBSCRIPTIONS | 1,400 | 111 | 663 | 737 | 47% | 37 |
| CPE COMMITTEE | 1,000 | - | - | 1,000 | 0% | 500 |
| VLEX FASTCASE | 87,000 | - | 87,812 | (812) | 101% | (44,312) |
| **TOTAL DIRECT EXPENSES:** | **116,785** | **1,039** | **92,936** | **23,849** | **80%** | **(34,544)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (3.51 FTE) | 385,777 | 33,428 | 197,201 | 188,576 | 51% | (4,313) |
| BENEFITS EXPENSE | 105,599 | 9,660 | 55,039 | 50,560 | 52% | (2,239) |
| OTHER INDIRECT EXPENSE | 120,866 | 9,413 | 52,840 | 68,026 | 44% | 7,593 |
| **TOTAL INDIRECT EXPENSES:** | **612,242** | **52,501** | **305,080** | **307,162** | **50%** | **1,041** |
| **TOTAL ALL EXPENSES:** | **729,027** | **53,540** | **398,016** | **331,010** | **55%** | **(33,503)** |
| **NET INCOME (LOSS):** | **(658,027)** | **(53,540)** | **(356,667)** | **(301,360)** | **54%** | **(27,653)** |

# Washington State Bar Association

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**50% OF YEAR COMPLETE**

## FACILITIES & OPERATIONS

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 2,376 | 198 | 1,188 | 1,188 | 50% | - |
| STAFF MEMBERSHIP DUES | 189 | - | - | 189 | 0% | 95 |
| **TOTAL DIRECT EXPENSES:** | **2,565** | **198** | **1,188** | **1,377** | **46%** | **95** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (5.78 FTE) | 406,195 | 37,620 | 218,375 | 187,820 | 54% | (15,278) |
| BENEFITS EXPENSE | 141,474 | 13,535 | 76,631 | 64,843 | 54% | (5,894) |
| OTHER INDIRECT EXPENSE | 199,033 | 15,493 | 86,965 | 112,068 | 44% | 12,552 |
| **TOTAL INDIRECT EXPENSES:** | **746,702** | **66,647** | **381,971** | **364,731** | **51%** | **(8,620)** |
| **TOTAL ALL EXPENSES:** | **749,267** | **66,845** | **383,159** | **366,108** | **51%** | **(8,525)** |
| **NET INCOME (LOSS):** | **(749,267)** | **(66,845)** | **(383,159)** | **(366,108)** | **51%** | **(8,525)** |

# Washington State Bar Association

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**50% OF YEAR COMPLETE**

## FINANCE

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| INTEREST INCOME | 600,000 | 70,931 | 320,276 | 279,724 | 53% | 20,276 |
| **TOTAL REVENUE:** | **600,000** | **70,931** | **320,276** | **279,724** | **53%** | **20,276** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 3,750 | 458 | 2,882 | 868 | 77% | (1,007) |
| STAFF CONFERENCE & TRAINING | 500 | - | - | 500 | 0% | 250 |
| STAFF MEMBERSHIP DUES | 670 | - | 230 | 440 | 34% | 105 |
| **TOTAL DIRECT EXPENSES:** | **4,920** | **458** | **3,112** | **1,808** | **63%** | **(652)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (6.92 FTE) | 777,786 | 70,829 | 398,571 | 379,215 | 51% | (9,678) |
| BENEFITS EXPENSE | 209,178 | 19,506 | 111,135 | 98,043 | 53% | (6,546) |
| OTHER INDIRECT EXPENSE | 238,288 | 18,563 | 104,200 | 134,088 | 44% | 14,944 |
| **TOTAL INDIRECT EXPENSES:** | **1,225,253** | **108,899** | **613,906** | **611,346** | **50%** | **(1,280)** |
| **TOTAL ALL EXPENSES:** | **1,230,173** | **109,357** | **617,018** | **613,154** | **50%** | **(1,932)** |
| **NET INCOME (LOSS):** | **(630,173)** | **(38,425)** | **(296,742)** | **(333,431)** | **47%** | **18,344** |

# Washington State Bar Association

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**50% OF YEAR COMPLETE**

| | FISCAL 2026 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 | 3,350 | - | 3,350 | - | 100% | (1,675) |
| PRINTING & COPYING | 1,000 | - | - | 1,000 | 0% | 500 |
| STAFF TRAVEL/PARKING | 4,000 | - | 21 | 3,979 | 1% | 1,979 |
| SUPPLIES | 2,000 | - | 11 | 1,989 | 1% | 989 |
| BOARD OF TRUSTEES | 3,600 | 25 | 100 | 3,500 | 3% | 1,700 |
| EQUIPMENT/HARDWARE/SOFTWARE | 2,635 | 220 | 1,318 | 1,317 | 50% | (1) |
| POSTAGE | 400 | - | - | 400 | 0% | 200 |
| STAFF CONFERENCE & TRAINING | 2,200 | 69 | 69 | 2,131 | 3% | 1,031 |
| **TOTAL DIRECT EXPENSES:** | **19,185** | **314** | **4,869** | **14,316** | **25%** | **4,723** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.05 FTE) | 108,755 | 12,074 | 56,719 | 52,036 | 52% | (2,342) |
| BENEFITS EXPENSE | 30,528 | 2,805 | 15,890 | 14,639 | 52% | (625) |
| OTHER INDIRECT EXPENSE | 36,156 | 2,812 | 15,782 | 20,374 | 44% | 2,296 |
| **TOTAL INDIRECT EXPENSES:** | **175,440** | **17,691** | **88,391** | **87,049** | **50%** | **(671)** |
| **TOTAL ALL EXPENSES:** | **194,625** | **18,005** | **93,261** | **101,365** | **48%** | **4,052** |
| **NET INCOME (LOSS):** | **(194,625)** | **(18,005)** | **(93,261)** | **(101,365)** | **48%** | **4,052** |

# Washington State Bar Association

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**50% OF YEAR COMPLETE**

## HUMAN RESOURCES

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 300 | 96 | 96 | 204 | 32% | 54 |
| STAFF MEMBERSHIP DUES | 1,200 | 299 | 852 | 348 | 71% | (252) |
| SUBSCRIPTIONS | 2,000 | - | 1,192 | 808 | 60% | (192) |
| STAFF TRAINING- GENERAL | 29,300 | 100 | 3,764 | 25,536 | 13% | 10,886 |
| RECRUITING AND ADVERTISING | 8,750 | - | 1,778 | 6,972 | 20% | 2,597 |
| HR INFORMATION SYSTEM | 65,950 | 4,426 | 34,975 | 30,975 | 53% | (2,000) |
| SALARY SURVEYS | 3,000 | 934 | 934 | 2,066 | 31% | 566 |
| CONSULTING SERVICES | 1,000 | - | - | 1,000 | 0% | 500 |
| STAFF CONFERENCE & TRAINING | 4,200 | 2,385 | 2,577 | 1,623 | 61% | (477) |
| TRANSFER TO INDIRECT EXPENSE | (115,700) | (8,241) | (46,168) | (69,532) | 40% | (11,682) |
| **TOTAL DIRECT EXPENSES:** | - | - | - | - | | - |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.00 FTE) | 504,229 | 39,357 | 220,428 | 283,801 | 44% | 31,687 |
| ALLOWANCE FOR OPEN POSITIONS | (200,000) | - | - | (200,000) | 0% | (100,000) |
| BENEFITS EXPENSE | 98,098 | 11,237 | 62,305 | 35,793 | 64% | (13,256) |
| OTHER INDIRECT EXPENSE | 137,739 | 10,739 | 60,283 | 77,456 | 44% | 8,586 |
| **TOTAL INDIRECT EXPENSES:** | **540,066** | **61,333** | **343,016** | **197,050** | **64%** | **(72,983)** |
| **TOTAL ALL EXPENSES:** | **540,066** | **61,333** | **343,016** | **197,050** | **64%** | **(72,983)** |
| **NET INCOME (LOSS):** | **(540,066)** | **(61,333)** | **(343,016)** | **(197,050)** | **64%** | **(72,983)** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## LAW CLERK PROGRAM

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| LAW CLERK FEES | 220,000 | 3,000 | 251,667 | (31,667) | 114% | 141,667 |
| LAW CLERK APPLICATION FEES | 4,000 | 400 | 3,300 | 700 | 83% | 1,300 |
| **TOTAL REVENUE:** | **224,000** | **3,400** | **254,967** | **(30,967)** | **114%** | **142,967** |
| **DIRECT EXPENSES:** | | | | | | |
| SUBSCRIPTIONS | 331 | - | - | 331 | 0% | 166 |
| DEPRECIATION | 37,278 | 2,908 | 17,448 | 19,830 | 47% | 1,191 |
| CHARACTER & FITNESS INVESTIGATIONS | 100 | - | - | 100 | 0% | 50 |
| LAW CLERK BOARD EXPENSE | 9,000 | 2,453 | 5,122 | 3,878 | 57% | (622) |
| SOFTWARE HOSTING | 700 | 89 | 513 | 187 | 73% | (163) |
| LAW CLERK OUTREACH | 20,000 | 13,561 | 13,705 | 6,295 | 69% | (3,705) |
| **TOTAL DIRECT EXPENSES:** | **67,409** | **19,011** | **36,789** | **30,620** | **55%** | **(3,084)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.18 FTE) ** | 104,845 | 9,926 | 50,553 | 54,291 | 48% | 1,869 |
| BENEFITS EXPENSE | 31,938 | 2,956 | 16,612 | 15,326 | 52% | (643) |
| OTHER INDIRECT EXPENSE | 40,633 | 3,155 | 17,709 | 22,924 | 44% | 2,608 |
| **TOTAL INDIRECT EXPENSES:** | **177,416** | **16,037** | **84,874** | **92,542** | **48%** | **3,834** |
| **TOTAL ALL EXPENSES:** | **244,825** | **35,048** | **121,663** | **123,162** | **50%** | **750** |
| **NET INCOME (LOSS):** | **(20,825)** | **(31,648)** | **133,304** | **(154,129)** | **-640%** | **143,716** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## LICENSING & MEMBERSHIP RECORDS

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| STATUS CERTIFICATE FEES | 29,000 | 2,775 | 17,174 | 11,826 | 59% | 2,674 |
| INVESTIGATION FEES | 25,000 | 1,200 | 10,580 | 14,420 | 42% | (1,920) |
| PRO HAC VICE | 435,000 | 49,140 | 281,982 | 153,018 | 65% | 64,482 |
| MEMBER CONTACT INFORMATION | 5,000 | 1,405 | 4,055 | 945 | 81% | 1,555 |
| PHOTO BAR CARD SALES | 260 | 72 | 324 | (64) | 125% | 194 |
| **TOTAL REVENUE:** | **494,260** | **54,592** | **314,115** | **180,145** | **64%** | **66,985** |
| **DIRECT EXPENSES:** | | | | | | |
| POSTAGE | 4,000 | 1,914 | 2,144 | 1,856 | 54% | (144) |
| SOFTWARE HOSTING | 18,380 | 2,295 | 13,265 | 5,115 | 72% | (4,075) |
| INVESTIGATION | 300 | - | - | 300 | 0% | 150 |
| **TOTAL DIRECT EXPENSES:** | **22,680** | **4,209** | **15,409** | **7,271** | **68%** | **(4,069)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.78 FTE) ** | 503,843 | 46,847 | 256,713 | 247,130 | 51% | (4,792) |
| BENEFITS EXPENSE | 139,284 | 12,957 | 72,859 | 66,425 | 52% | (3,217) |
| OTHER INDIRECT EXPENSE | 164,598 | 12,832 | 72,027 | 92,571 | 44% | 10,272 |
| **TOTAL INDIRECT EXPENSES:** | **807,725** | **72,636** | **401,600** | **406,126** | **50%** | **2,263** |
| **TOTAL ALL EXPENSES:** | **830,405** | **76,844** | **417,009** | **413,397** | **50%** | **(1,806)** |
| **NET INCOME (LOSS):** | **(336,145)** | **(22,253)** | **(102,894)** | **(233,251)** | **31%** | **65,179** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## LIMITED LICENSE LEGAL TECHNICIAN PROGRAM

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| LLLT LICENSE FEES | 17,000 | 1,395 | 8,012 | 8,988 | 47% | (488) |
| LLLT LATE LICENSE FEES | 137 | 30 | 541 | (404) | 395% | 472 |
| MCLE LATE FEES | 150 | - | 450 | (300) | 300% | 375 |
| **TOTAL REVENUE:** | **17,287** | **1,425** | **9,003** | **8,284** | **52%** | **359** |
| **DIRECT EXPENSES:** | | | | | | |
| LLLT BOARD | 9,000 | 462 | 1,304 | 7,696 | 14% | 3,196 |
| LLLT EDUCATION | 1,000 | - | - | 1,000 | 0% | 500 |
| **TOTAL DIRECT EXPENSES:** | **10,000** | **462** | **1,304** | **8,696** | **13%** | **3,696** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.43 FTE) ** | 41,479 | 3,713 | 20,884 | 20,595 | 50% | (144) |
| BENEFITS EXPENSE | 12,046 | 1,104 | 6,229 | 5,817 | 52% | (206) |
| OTHER INDIRECT EXPENSE | 14,807 | 1,143 | 6,413 | 8,394 | 43% | 991 |
| **TOTAL INDIRECT EXPENSES:** | **68,332** | **5,960** | **33,525** | **34,807** | **49%** | **641** |
| **TOTAL ALL EXPENSES:** | **78,332** | **6,422** | **34,829** | **43,503** | **44%** | **4,337** |
| **NET INCOME (LOSS):** | **(61,045)** | **(4,997)** | **(25,826)** | **(35,219)** | **42%** | **4,696** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## LIMITED PRACTICE OFFICERS

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| INVESTIGATION FEES | 1,000 | - | 500 | 500 | 50% | - |
| MCLE LATE FEES | 3,000 | 2,250 | 5,400 | (2,400) | 180% | 3,900 |
| LPO EXAMINATION FEES | 18,000 | (100) | 12,100 | 5,900 | 67% | 3,100 |
| LPO LICENSE FEES | 158,000 | 12,743 | 74,080 | 83,920 | 47% | (4,920) |
| LPO LATE LICENSE FEES | 2,000 | 1,110 | 3,450 | (1,450) | 173% | 2,450 |
| **TOTAL REVENUE:** | **182,000** | **16,003** | **95,530** | **86,470** | **52%** | **4,530** |
| **DIRECT EXPENSES:** | | | | | | |
| FACILITY, PARKING, FOOD | 9,500 | - | 2,696 | 6,804 | 28% | 2,054 |
| EXAM WRITING | 15,000 | - | 4,200 | 10,800 | 28% | 3,300 |
| LPO BOARD | 4,000 | 267 | 267 | 3,733 | 7% | 1,733 |
| LPO OUTREACH | 500 | - | - | 500 | 0% | 250 |
| PRINTING & COPYING | 200 | - | 65 | 135 | 32% | 35 |
| SUPPLIES | 100 | - | - | 100 | 0% | 50 |
| SOFTWARE HOSTING | 3,404 | 355 | 2,054 | 1,350 | 60% | (352) |
| **TOTAL DIRECT EXPENSES:** | **32,704** | **622** | **9,282** | **23,422** | **28%** | **7,070** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.58 FTE) ** | 56,369 | 5,086 | 28,318 | 28,051 | 50% | (134) |
| BENEFITS EXPENSE | 16,315 | 1,502 | 8,490 | 7,825 | 52% | (332) |
| OTHER INDIRECT EXPENSE | 19,972 | 1,556 | 8,736 | 11,236 | 44% | 1,250 |
| **TOTAL INDIRECT EXPENSES:** | **92,656** | **8,144** | **45,544** | **47,112** | **49%** | **784** |
| **TOTAL ALL EXPENSES:** | **125,360** | **8,767** | **54,826** | **70,534** | **44%** | **7,854** |
| **NET INCOME (LOSS):** | **56,640** | **7,236** | **40,704** | **15,936** | **72%** | **12,384** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 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 | - | 157 | 2,343 | 6% | 1,093 |
| STAFF MEMBERSHIP DUES | 215 | - | - | 215 | 0% | 108 |
| JUD RECOMMEND COMMITTEE | 3,250 | - | 1,096 | 2,154 | 34% | 529 |
| SUBSCRIPTIONS | 2,000 | - | 1,990 | 10 | 99% | (990) |
| TELEPHONE | 575 | 50 | 298 | 277 | 52% | (10) |
| CONTRACT LOBBYIST | 12,500 | 3,125 | 9,375 | 3,125 | 75% | (3,125) |
| LEGISLATIVE REVIEW COMMITTEE | 1,250 | - | - | 1,250 | 0% | 625 |
| BOG LEGISLATIVE COMMITTEE | 300 | - | - | 300 | 0% | 150 |
| STAFF CONFERENCE & TRAINING | 2,200 | - | 248 | 1,952 | 11% | 852 |
| **TOTAL DIRECT EXPENSES:** | **24,790** | **3,175** | **13,163** | **11,627** | **53%** | **(768)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.70 FTE) | 164,492 | 14,749 | 81,273 | 83,219 | 49% | 973 |
| BENEFITS EXPENSE | 47,770 | 4,399 | 24,951 | 22,819 | 52% | (1,066) |
| OTHER INDIRECT EXPENSE | 58,539 | 4,556 | 25,575 | 32,964 | 44% | 3,695 |
| **TOTAL INDIRECT EXPENSES:** | **270,801** | **23,704** | **131,798** | **139,002** | **49%** | **3,602** |
| **TOTAL ALL EXPENSES:** | **295,591** | **26,879** | **144,962** | **150,629** | **49%** | **2,834** |
| **NET INCOME (LOSS):** | **(295,591)** | **(26,879)** | **(144,962)** | **(150,629)** | **49%** | **2,834** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **MANDATORY CONTINUING LEGAL EDUCATION** | | | | | | |
| **REVENUE:** | | | | | | |
| ACTIVITY APPLICATION FEE | 670,000 | 63,800 | 344,400 | 325,600 | 51% | 9,400 |
| ACTIVITY APPLICATION LATE FEE | 250,000 | 23,700 | 129,500 | 120,500 | 52% | 4,500 |
| MCLE LATE FEES | 232,000 | 44,600 | 238,975 | (6,975) | 103% | 122,975 |
| ANNUAL ACCREDITED SPONSOR FEES | 36,250 | - | 36,250 | - | 100% | 18,125 |
| ATTENDANCE LATE FEES | 120,000 | 6,000 | 55,500 | 64,500 | 46% | (4,500) |
| COMITY CERTIFICATES | 30,000 | 875 | 26,275 | 3,725 | 88% | 11,275 |
| **TOTAL REVENUE:** | **1,338,250** | **138,975** | **830,900** | **507,350** | **62%** | **161,775** |
| **DIRECT EXPENSES:** | | | | | | |
| DEPRECIATION | 142,057 | 12,012 | 72,072 | 69,985 | 51% | (1,044) |
| STAFF MEMBERSHIP DUES | 525 | - | 525 | - | 100% | (263) |
| MCLE BOARD EXPENSES | 6,000 | - | 531 | 5,469 | 9% | 2,469 |
| STAFF TRAVEL/PARKING | 50 | - | - | 50 | 0% | 25 |
| STAFF CONFERENCE & TRAINING | 4,400 | - | - | 4,400 | 0% | 2,200 |
| **TOTAL DIRECT EXPENSES:** | **153,032** | **12,012** | **73,128** | **79,904** | **48%** | **3,388** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.73 FTE) | 407,360 | 41,312 | 224,665 | 182,695 | 55% | (20,985) |
| BENEFITS EXPENSE | 124,032 | 11,940 | 66,374 | 57,658 | 54% | (4,358) |
| OTHER INDIRECT EXPENSE | 162,876 | 12,681 | 71,182 | 91,694 | 44% | 10,256 |
| **TOTAL INDIRECT EXPENSES:** | **694,269** | **65,933** | **362,221** | **332,048** | **52%** | **(15,087)** |
| **TOTAL ALL EXPENSES:** | **847,301** | **77,945** | **435,349** | **411,952** | **51%** | **(11,698)** |
| **NET INCOME (LOSS):** | **490,949** | **61,030** | **395,551** | **95,398** | **81%** | **150,077** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **MEMBER SERVICES & ENGAGEMENT TEAM** | | | | | | |
| **(LLB-MINI-MSE-NME)** | | | | | | |
| **REVENUE:** | | | | | | |
| ROYALTIES | 10,800 | 1,200 | 6,000 | 4,800 | 56% | 600 |
| NME PRODUCT SALES | 120,000 | 3,821 | 90,654 | 29,346 | 76% | 30,654 |
| DIGITAL VIDEO SALES | 25,000 | 1,176 | 21,266 | 3,734 | 85% | 8,766 |
| SPONSORSHIPS | 11,500 | - | 9,000 | 2,500 | 78% | 3,250 |
| SEMINAR REGISTRATIONS | 12,000 | 2,846 | 7,593 | 4,407 | 63% | 1,593 |
| TRIAL ADVOCACY PROGRAM | 12,000 | - | (149) | 12,149 | -1% | (6,149) |
| **TOTAL REVENUE:** | **191,300** | **9,043** | **134,364** | **56,936** | **70%** | **38,714** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 3,500 | - | 48 | 3,452 | 1% | 1,702 |
| STAFF CONFERENCE & TRAINING | 2,700 | - | (25) | 2,725 | -1% | 1,375 |
| SMALL TOWN AND RURAL COMMITTEE | 7,500 | - | - | 7,500 | 0% | 3,750 |
| PRINTING & COPYING | 1,600 | 1,502 | 1,502 | 98 | 94% | (702) |
| DISABILITY ACCOMMODATIONS | 2,000 | - | - | 2,000 | 0% | 1,000 |
| HONORARIUM | 1,500 | - | - | 1,500 | 0% | 750 |
| SUBSCRIPTIONS | 400 | - | - | 400 | 0% | 200 |
| NEW MEMBER LIAISON SECTION PROGRAM | 1,300 | - | 565 | 735 | 43% | 85 |
| SMALL TOWN AND RURAL COMMITTEE OUTREACH AND ACTIVITIES | 70,000 | - | 3,000 | 67,000 | 4% | 32,000 |
| ON24 OVERAGE CHARGE | 4,500 | - | 4,422 | 78 | 98% | (2,172) |
| MEMBER ENGAGEMENT COUNCIL | 500 | - | - | 500 | 0% | 250 |
| NEW MEMBER OUTREACH EVENTS | 5,000 | - | 938 | 4,062 | 19% | 1,562 |
| SPEAKERS & PROGRAM DEVELOP | 100 | - | - | 100 | 0% | 50 |
| WASHINGTON NEW MEMBERS COMMITTEE | 15,000 | 1,671 | 8,581 | 6,419 | 57% | (1,081) |
| TRIAL ADVOCACY EXPENSES | 3,200 | - | - | 3,200 | 0% | 1,600 |
| LAW LIBRARY DESKBOOK ACCESS | 10,000 | - | - | 10,000 | 0% | 5,000 |
| LAW SCHOOL OUTREACH | 500 | - | 66 | 434 | 13% | 184 |
| RECEPTION/FORUM EXPENSE | 1,000 | - | 17 | 983 | 2% | 483 |
| STAFF MEMBERSHIP DUES | 1,020 | - | - | 1,020 | 0% | 510 |
| LIBRARY MATERIALS/RESOURCES | 4,000 | 128 | 292 | 3,708 | 7% | 1,708 |
| SPEAKERS & PROGRAM DEVELOPMENT | 500 | - | - | 500 | 0% | 250 |
| AWARDS | 1,000 | - | 72 | 928 | 7% | 428 |
| **TOTAL DIRECT EXPENSES:** | **136,820** | **3,301** | **19,478** | **117,342** | **14%** | **48,932** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.73 FTE) | 341,638 | 31,780 | 177,850 | 163,788 | 52% | (7,031) |
| BENEFITS EXPENSE | 117,073 | 10,912 | 61,954 | 55,119 | 53% | (3,417) |
| OTHER INDIRECT EXPENSE | 162,876 | 12,681 | 71,182 | 91,695 | 44% | 10,256 |
| **TOTAL INDIRECT EXPENSES:** | **621,588** | **55,372** | **310,986** | **310,602** | **50%** | **(192)** |
| **TOTAL ALL EXPENSES:** | **758,408** | **58,674** | **330,464** | **427,944** | **44%** | **48,740** |
| **NET INCOME (LOSS):** | **(567,108)** | **(49,631)** | **(196,100)** | **(371,008)** | **35%** | **87,454** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 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% | 10,000 |
| WASHINGTON LEADERSHIP INSTITUTE | 100,000 | - | 100,000 | - | 100% | (50,000) |
| ED TRAVEL & OUTREACH | 6,000 | 324 | 3,010 | 2,990 | 50% | (10) |
| STAFF TRAVEL/PARKING | 2,000 | 198 | 1,188 | 812 | 59% | (188) |
| STAFF CONFERENCE & TRAINING | 13,300 | 1,718 | 5,500 | 7,800 | 41% | 1,150 |
| STAFF MEMBERSHIP DUES | 1,335 | - | 945 | 390 | 71% | (278) |
| **TOTAL DIRECT EXPENSES:** | **142,635** | **2,240** | **110,643** | **31,992** | **78%** | **(39,326)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.23 FTE) | 643,856 | 63,968 | 329,991 | 313,865 | 51% | (8,063) |
| BENEFITS EXPENSE | 142,505 | 14,267 | 78,057 | 64,447 | 55% | (6,805) |
| OTHER INDIRECT EXPENSE | 145,659 | 11,351 | 63,713 | 81,946 | 44% | 9,116 |
| **TOTAL INDIRECT EXPENSES:** | **932,020** | **89,586** | **471,761** | **460,259** | **51%** | **(5,751)** |
| **TOTAL ALL EXPENSES:** | **1,074,655** | **91,827** | **582,405** | **492,251** | **54%** | **(45,077)** |
| **NET INCOME (LOSS):** | **(1,074,655)** | **(91,827)** | **(582,405)** | **(492,251)** | **54%** | **(45,077)** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## OFFICE OF GENERAL COUNSEL

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| RECOVERY OF DISCIPLINE COSTS | - | - | 1,000 | (1,000) | | 1,000 |
| **TOTAL REVENUE:** | **-** | **-** | **1,000** | **(1,000)** | | **-** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 3,500 | - | 1,614 | 1,886 | 46% | 136 |
| STAFF MEMBERSHIP DUES | 2,500 | - | 2,004 | 497 | 80% | (754) |
| COURT RULES COMMITTEE | 1,000 | - | - | 1,000 | 0% | 500 |
| CUSTODIANSHIPS | 5,000 | - | 301 | 4,699 | 6% | 2,199 |
| WILLS | 1,000 | - | - | 1,000 | 0% | 500 |
| LITIGATION EXPENSES | 1,000 | - | - | 1,000 | 0% | 500 |
| DISABILITY ACCOMMODATIONS | 2,500 | - | 58 | 2,442 | 2% | 1,192 |
| STAFF CONFERENCE & TRAINING | 10,250 | 2,513 | 2,812 | 7,438 | 27% | 2,313 |
| **TOTAL DIRECT EXPENSES:** | **26,750** | **2,513** | **6,789** | **19,961** | **25%** | **6,586** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (6.12 FTE) | 718,300 | 59,357 | 343,003 | 375,296 | 48% | 16,147 |
| BENEFITS EXPENSE | 187,732 | 16,918 | 95,734 | 91,998 | 51% | (1,868) |
| OTHER INDIRECT EXPENSE | 210,741 | 16,433 | 92,245 | 118,495 | 44% | 13,125 |
| **TOTAL INDIRECT EXPENSES:** | **1,116,772** | **92,708** | **530,982** | **585,790** | **48%** | **27,404** |
| **TOTAL ALL EXPENSES:** | **1,143,522** | **95,221** | **537,771** | **605,752** | **47%** | **33,990** |
| **NET INCOME (LOSS):** | **(1,143,522)** | **(95,221)** | **(536,771)** | **(606,752)** | **47%** | **34,990** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSE:** | | | | | | |
| STAFF MEMBERSHIP DUES | 100 | - | - | 100 | 0% | 50 |
| DISCIPLINARY BOARD EXPENSES | 3,000 | - | - | 3,000 | 0% | 1,500 |
| CHIEF HEARING OFFICER | 41,200 | 3,333 | 19,998 | 21,202 | 49% | 602 |
| COURT REPORTERS | 33,100 | 22,484 | 23,830 | 9,270 | 72% | (7,280) |
| HEARING OFFICER EXPENSES | 4,000 | 18 | 149 | 3,852 | 4% | 1,852 |
| HEARING OFFICER TRAINING | 1,000 | 900 | 900 | 100 | 90% | (400) |
| APPOINTED COUNSEL | 50,645 | 4,235 | 25,270 | 25,375 | 50% | 53 |
| DISCIPLINARY SELECTION PANEL | 1,000 | - | - | 1,000 | 0% | 500 |
| STAFF CONFERENCE & TRAINING | 2,200 | - | - | 2,200 | 0% | 1,100 |
| **TOTAL DIRECT EXPENSES:** | **136,245** | **30,970** | **70,147** | **66,098** | **51%** | **(2,024)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.30 FTE) | 128,774 | 12,509 | 67,438 | 61,336 | 52% | (3,051) |
| BENEFITS EXPENSE | 37,003 | 3,473 | 19,627 | 17,376 | 53% | (1,125) |
| OTHER INDIRECT EXPENSE | 44,765 | 3,494 | 19,610 | 25,155 | 44% | 2,773 |
| **TOTAL INDIRECT EXPENSES:** | **210,543** | **19,475** | **106,675** | **103,868** | **51%** | **(1,403)** |
| **TOTAL ALL EXPENSES:** | **346,788** | **50,446** | **176,822** | **169,966** | **51%** | **(3,428)** |
| **NET INCOME (LOSS):** | **(346,788)** | **(50,446)** | **(176,822)** | **(169,966)** | **51%** | **(3,428)** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## PRACTICE OF LAW BOARD

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| PRACTICE OF LAW BOARD | 16,000 | - | 197 | 15,803 | 1% | 7,803 |
| STAFF TRAVEL/PARKING | 200 | - | - | 200 | 0% | 100 |
| **TOTAL DIRECT EXPENSES:** | **16,200** | **-** | **197** | **16,003** | **1%** | **7,903** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.55 FTE) ** | 63,145 | 5,901 | 32,194 | 30,951 | 51% | (621) |
| BENEFITS EXPENSE | 16,771 | 1,546 | 8,753 | 8,018 | 52% | (368) |
| OTHER INDIRECT EXPENSE | 18,939 | 1,481 | 8,314 | 10,625 | 44% | 1,156 |
| **TOTAL INDIRECT EXPENSES:** | **98,855** | **8,929** | **49,260** | **49,594** | **50%** | **167** |
| **TOTAL ALL EXPENSES:** | **115,055** | **8,929** | **49,457** | **65,598** | **43%** | **8,070** |
| **NET INCOME (LOSS):** | **(115,055)** | **(8,929)** | **(49,457)** | **(65,598)** | **43%** | **8,070** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **PUBLIC SERVICE PROGRAMS** | | | | | | |
| **REVENUE:** | | | | | | |
| DONATIONS & GRANTS | 132,635 | - | 2,639 | 129,996 | 2% | (63,679) |
| **TOTAL REVENUE:** | **132,635** | **-** | **2,639** | **129,996** | **2%** | **(63,679)** |
| **DIRECT EXPENSES:** | | | | | | |
| DONATIONS/SPONSORSHIPS/GRANTS | - | - | (5,178) | 5,178 | | 5,178 |
| STAFF TRAVEL/PARKING | 2,000 | - | 39 | 1,961 | 2% | 961 |
| PRO BONO & PUBLIC SERVICE COMMITTEE | 3,500 | - | 1,882 | 1,618 | 54% | (132) |
| STAFF CONFERENCE & TRAINING | 3,200 | - | - | 3,200 | 0% | 1,600 |
| PRO BONO OUTREACH | 4,000 | - | - | 4,000 | 0% | 2,000 |
| **TOTAL DIRECT EXPENSES:** | **12,700** | **-** | **(3,257)** | **15,957** | **-26%** | **9,607** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.10 FTE) ** | 187,614 | 17,773 | 82,782 | 104,832 | 44% | 11,025 |
| BENEFITS EXPENSE | 50,197 | 5,205 | 26,751 | 23,446 | 53% | (1,653) |
| OTHER INDIRECT EXPENSE | 72,313 | 5,619 | 28,638 | 43,675 | 40% | 7,519 |
| **TOTAL INDIRECT EXPENSES:** | **310,124** | **28,597** | **138,171** | **171,953** | **45%** | **16,891** |
| **TOTAL ALL EXPENSES:** | **322,824** | **28,597** | **134,914** | **187,910** | **42%** | **26,498** |
| **NET INCOME (LOSS):** | **(190,189)** | **(28,597)** | **(132,275)** | **(57,914)** | **70%** | **(37,181)** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## PUBLICATION & DESIGN SERVICES

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| SUBSCRIPTIONS | 200 | - | - | 200 | 0% | 100 |
| IMAGE LIBRARY | 4,800 | - | 4,756 | 44 | 99% | (2,356) |
| **TOTAL DIRECT EXPENSES:** | **5,000** | **-** | **4,756** | **244** | **95%** | **(2,256)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.89 FTE) | 70,644 | 6,373 | 36,102 | 34,542 | 51% | (780) |
| BENEFITS EXPENSE | 22,914 | 2,133 | 12,109 | 10,805 | 53% | (652) |
| OTHER INDIRECT EXPENSE | 30,647 | 2,393 | 13,434 | 17,213 | 44% | 1,890 |
| **TOTAL INDIRECT EXPENSES:** | **124,205** | **10,899** | **61,644** | **62,560** | **50%** | **458** |
| **TOTAL ALL EXPENSES:** | **129,205** | **10,899** | **66,400** | **62,804** | **51%** | **(1,798)** |
| **NET INCOME (LOSS):** | **(129,205)** | **(10,899)** | **(66,400)** | **(62,804)** | **51%** | **(1,798)** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## REGULATORY SERVICES FTE

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF MEMBERSHIP DUES | 490 | - | 490 | - | 100% | (245) |
| STAFF CONFERENCE & TRAINING | 11,500 | - | 734 | 10,766 | 6% | 5,016 |
| STAFF TRAVEL/PARKING | 600 | - | 106 | 494 | 18% | 194 |
| **TOTAL DIRECT EXPENSES:** | **12,590** | **-** | **1,330** | **11,260** | **11%** | **5,210** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.00 FTE) ** | 288,255 | 25,538 | 140,610 | 147,646 | 49% | 3,518 |
| BENEFITS EXPENSE | 68,347 | 6,145 | 34,959 | 33,388 | 51% | (786) |
| OTHER INDIRECT EXPENSE | 68,870 | 5,356 | 30,061 | 38,808 | 44% | 4,373 |
| **TOTAL INDIRECT EXPENSES:** | **425,472** | **37,038** | **205,630** | **219,841** | **48%** | **7,106** |
| **TOTAL ALL EXPENSES:** | **438,062** | **37,038** | **206,961** | **231,101** | **47%** | **12,315** |
| **NET INCOME (LOSS):** | **(438,062)** | **(37,038)** | **(206,961)** | **(231,101)** | **47%** | **12,070** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## REGULATORY REFORM

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| CONSULTING SERVICES | 25,000 | - | 8,828 | 16,172 | 35% | 3,672 |
| OUTREACH EXPENSES | 10,000 | - | - | 10,000 | 0% | 5,000 |
| MEETING EXPENSE | 2,000 | - | - | 2,000 | 0% | 1,000 |
| SOFTWARE HOSTING | 20,000 | - | - | 20,000 | 0% | 10,000 |
| **TOTAL DIRECT EXPENSES:** | **57,000** | **-** | **8,828** | **48,172** | **15%** | **-** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.85 FTE) ** | 110,346 | 11,355 | 57,534 | 52,812 | 52% | (2,361) |
| BENEFITS EXPENSE | 27,639 | 2,574 | 14,424 | 13,215 | 52% | (604) |
| OTHER INDIRECT EXPENSE | 29,270 | 2,276 | 12,775 | 16,495 | 44% | 1,860 |
| **TOTAL INDIRECT EXPENSES:** | **167,255** | **16,204** | **84,733** | **82,522** | **51%** | **(1,105)** |
| **TOTAL ALL EXPENSES:** | **224,255** | **16,204** | **93,561** | **130,694** | **42%** | **(1,105)** |
| **NET INCOME (LOSS):** | **(224,255)** | **(16,204)** | **(93,561)** | **(130,694)** | **42%** | **18,567** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 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 | 6,675 | 388,434 | (113,434) | 141% | 250,934 |
| **TOTAL REVENUE:** | **275,000** | **6,675** | **388,434** | **(113,434)** | **141%** | **250,934** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 1,900 | 32 | 336 | 1,564 | 18% | 614 |
| SECTION/COMMITTEE CHAIR MTGS | 500 | - | 71 | 429 | 14% | 179 |
| **TOTAL DIRECT EXPENSES:** | **2,400** | **32** | **407** | **1,993** | **17%** | **793** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.53 FTE) | 174,309 | 16,471 | 89,577 | 84,732 | 51% | (2,422) |
| BENEFITS EXPENSE | 61,514 | 5,736 | 32,387 | 29,127 | 53% | (1,630) |
| OTHER INDIRECT EXPENSE | 87,120 | 6,794 | 38,138 | 48,982 | 44% | 5,422 |
| **TOTAL INDIRECT EXPENSES:** | **322,943** | **29,001** | **160,102** | **162,841** | **50%** | **1,369** |
| **TOTAL ALL EXPENSES:** | **325,343** | **29,033** | **160,510** | **164,833** | **49%** | **2,162** |
| **NET INCOME (LOSS):** | **(50,343)** | **(22,358)** | **227,925** | **(278,268)** | **-453%** | **253,096** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **SECTIONS OPERATIONS** | | | | | | |
| **REVENUE:** | | | | | | |
| SECTION DUES | 451,143 | 10,735 | 625,884 | (174,741) | 139% | 400,313 |
| SEMINAR PROFIT SHARE | 157,850 | 1,498 | 1,498 | 156,352 | 1% | (77,427) |
| PUBLICATIONS REVENUE | 1,250 | - | - | 1,250 | 0% | (625) |
| OTHER | 43,073 | 1,485 | 21,782 | 21,291 | 51% | 246 |
| **TOTAL REVENUE:** | **653,316** | **13,718** | **649,164** | **4,152** | **99%** | **322,506** |
| **DIRECT EXPENSES:** | | | | | | |
| DIRECT EXPENSES OF SECTION ACTIVITIES | 810,582 | 14,228 | 124,809 | 685,773 | 15% | 280,482 |
| REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES | 280,540 | 6,675 | 388,434 | (107,895) | 138% | (248,164) |
| **TOTAL DIRECT EXPENSES:** | **1,091,122** | **20,903** | **513,243** | **577,878** | **47%** | **32,318** |
| **NET INCOME (LOSS):** | **(437,806)** | **(7,185)** | **135,921** | **(573,727)** | **-31%** | **354,824** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| | FISCAL 2026 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 | 1,019,797 | 121,034 | 386,511 | 633,286 | 38% | 123,387 |
| STAFF TRAVEL/PARKING | 1,000 | 36 | 198 | 802 | 20% | 302 |
| STAFF MEMBERSHIP DUES | 410 | - | - | 410 | 0% | 205 |
| TELEPHONE | 90,000 | 7,006 | 46,960 | 43,040 | 52% | (1,960) |
| COMPUTER HARDWARE | 65,000 | 684 | 41,040 | 23,960 | 63% | (8,540) |
| COMPUTER SOFTWARE | 518,000 | 15,267 | 249,256 | 268,744 | 48% | 9,744 |
| HARDWARE SERVICE & WARRANTIES | 50,000 | - | 14,413 | 35,587 | 29% | 10,587 |
| SOFTWARE MAINTENANCE & LICENSING | 470,000 | 22,558 | 212,740 | 257,260 | 45% | 22,260 |
| THIRD PARTY SERVICES | 177,600 | 2,274 | 104,166 | 73,434 | 59% | (15,366) |
| CLOUD INFRASTRUCTURE | 130,000 | 10,267 | 25,643 | 104,357 | 20% | 39,357 |
| STAFF CONFERENCE & TRAINING | 6,000 | - | - | 6,000 | 0% | 3,000 |
| TRANSFER TO INDIRECT EXPENSES | (2,527,807) | (179,126) | (1,080,926) | (1,446,881) | 43% | (182,977) |
| **TOTAL DIRECT EXPENSES:** | - | - | - | - | | - |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (5.00 FTE) | 629,276 | 68,991 | 358,519 | 270,757 | 57% | (43,881) |
| BENEFITS EXPENSE | 158,341 | 14,759 | 88,928 | 69,413 | 56% | (9,758) |
| CAPITAL LABOR & OVERHEAD | - | (9,146) | (16,181) | 16,181 | | (16,181) |
| OTHER INDIRECT EXPENSE | 172,174 | 13,401 | 75,221 | 96,953 | 44% | 10,866 |
| **TOTAL INDIRECT EXPENSES:** | **959,791** | **88,005** | **506,487** | **453,304** | **53%** | **(58,953)** |
| **TOTAL ALL EXPENSES:** | **959,791** | **88,005** | **506,487** | **453,304** | **53%** | **(58,953)** |
| **NET INCOME (LOSS):** | **(959,791)** | **(88,005)** | **(506,487)** | **(453,304)** | **53%** | **(26,591)** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

## VOLUNTEER ENGAGEMENT

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| POSTAGE | 600 | - | - | 600 | 0% | 300 |
| STAFF MEMBERSHIP DUES | 385 | - | 424 | (39) | 110% | (232) |
| STAFF CONFERENCE & TRAINING | 4,500 | 1,653 | 1,653 | 2,847 | 37% | 597 |
| SUBSCRIPTIONS | 816 | - | 358 | 458 | 44% | 50 |
| VOLUNTEER RECOGNITION | 2,000 | - | 660 | 1,340 | 33% | 340 |
| REGULATORY SCHOOL | 10,000 | - | 5,286 | 4,714 | 53% | (286) |
| ABA DELEGATES | 18,000 | 6,804 | 6,876 | 11,124 | 38% | 2,124 |
| **TOTAL DIRECT EXPENSES:** | **36,301** | **8,457** | **15,258** | **21,043** | **42%** | **2,893** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.70 FTE) | 149,220 | 14,204 | 74,519 | 74,700 | 50% | 91 |
| BENEFITS EXPENSE | 45,777 | 4,228 | 24,055 | 21,722 | 53% | (1,167) |
| OTHER INDIRECT EXPENSE | 58,539 | 4,552 | 25,550 | 32,990 | 44% | 3,720 |
| **TOTAL INDIRECT EXPENSES:** | **253,536** | **22,983** | **124,124** | **129,412** | **49%** | **2,644** |
| **TOTAL ALL EXPENSES:** | **289,837** | **31,440** | **139,381** | **150,455** | **48%** | **2,644** |
| **NET INCOME (LOSS):** | **(289,837)** | **(31,440)** | **(139,381)** | **(150,455)** | **48%** | **5,537** |

## Washington State Bar Association

Statement of Activities
For the Period from March 01, 2026 to March 31, 2026
**50% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **INDIRECT EXPENSES:** | | | | | | |
| SALARIES | 14,130,725 | 1,298,743 | 7,098,926 | 7,031,799 | 50% | (33,563) |
| TEMPORARY SALARIES | 212,850 | 19,894 | 85,716 | 127,134 | 40% | 20,709 |
| CAPITAL LABOR & OVERHEAD | - | (9,146) | (16,181) | 16,181 | | 16,181 |
| ALLOWANCE FOR OPEN POSITIONS | (200,000) | - | - | (200,000) | 0% | (100,000) |
| EMPLOYEE ASSISTANCE PLAN | 4,800 | - | 2,400 | 2,400 | 50% | - |
| EMPLOYEE SERVICE AWARDS | 2,260 | 60 | 60 | 2,200 | 3% | 1,070 |
| FICA (EMPLOYER PORTION) | 1,067,890 | 91,572 | 522,305 | 545,584 | 49% | 11,639 |
| L&I INSURANCE | 65,406 | 15,160 | 29,051 | 36,355 | 44% | 3,652 |
| WA STATE FAMILY MEDICAL LEAVE (EMPLOYER PO | 38,961 | 3,952 | 20,373 | 18,588 | 52% | (893) |
| MEDICAL (EMPLOYER PORTION) | 1,959,293 | 190,651 | 1,089,424 | 869,869 | 56% | (109,777) |
| RETIREMENT (EMPLOYER PORTION) | 778,534 | 65,676 | 388,282 | 390,252 | 50% | 985 |
| TRANSPORTATION ALLOWANCE | 25,944 | 361 | 26,321 | (377) | 101% | (13,349) |
| UNEMPLOYMENT INSURANCE | 73,419 | 9,794 | 37,303 | 36,116 | 51% | (593) |
| **TOTAL SALARY & BENEFITS EXPENSE:** | **18,160,082** | **1,686,717** | **9,283,980** | **8,876,102** | **51%** | **(203,939)** |
| WORKPLACE BENEFITS | 60,150 | 2,094 | 11,410 | 48,740 | 19% | 18,665 |
| HUMAN RESOURCES POOLED EXP | 115,700 | 8,241 | 46,168 | 69,532 | 40% | 11,682 |
| MEETING SUPPORT EXPENSES | 9,950 | 132 | 3,200 | 6,750 | 32% | 1,775 |
| RENT | 923,055 | 106,632 | 480,859 | 442,196 | 52% | (19,332) |
| PERSONAL PROP TAXES-WSBA | 6,500 | 514 | 3,399 | 3,101 | 52% | (149) |
| FURNITURE, MAINT, LH IMP | 48,450 | 9,678 | 17,206 | 31,244 | 36% | 7,019 |
| SAFETY & SECURITY | 10,420 | 313 | 1,053 | 9,367 | 10% | 4,157 |
| OFFICE SUPPLIES & EQUIPMENT | 19,635 | 1,314 | 7,636 | 11,999 | 39% | 2,182 |
| FURN, LH IMP, & OFFICE EQUIP DEPRECIATION | 224,084 | 18,466 | 111,586 | 112,498 | 50% | 456 |
| COMPUTER HARDWARE DEPRECIATION | 47,971 | 4,334 | 25,997 | 21,974 | 54% | (2,011) |
| COMPUTER SOFTWARE DEPRECIATION | 36,319 | 2,606 | 21,190 | 15,129 | 58% | (3,031) |
| INSURANCE | 273,491 | 22,171 | 133,027 | 140,464 | 49% | 3,719 |
| WORK HOME FURNITURE & EQUIP | 10,500 | 174 | 1,666 | 8,834 | 16% | 3,584 |
| PROFESSIONAL FEES-AUDIT | 43,500 | - | 41,695 | 1,805 | 96% | (19,945) |
| PROFESSIONAL FEES-LEGAL | 250,000 | 775 | 35,221 | 214,779 | 14% | 89,779 |
| ONLINE LEGAL RESEARCH | 89,000 | 12,457 | 45,223 | 43,777 | 51% | (723) |
| ACCOMODATIONS FUND | 6,500 | - | - | 6,500 | 0% | 3,250 |
| TRANSLATION SERVICES | 25,000 | 739 | 3,804 | 21,196 | 15% | 8,696 |
| TELEPHONE & INTERNET | 33,600 | 2,730 | 16,140 | 17,460 | 48% | 660 |
| POSTAGE - GENERAL | 12,000 | 601 | 4,024 | 7,976 | 34% | 1,976 |
| RECORDS MANAGEMENT | 7,500 | - | - | 7,500 | 0% | 3,750 |
| BANK FEES | 27,000 | 1,620 | 15,017 | 11,983 | 56% | (1,517) |
| PRODUCTION MAINTENANCE & SUPPLIES | 13,250 | 1,535 | 6,271 | 6,979 | 47% | 354 |
| COMPUTER POOLED EXPENSES | 2,527,807 | 179,052 | 1,080,526 | 1,447,281 | 43% | 183,377 |
| **TOTAL OTHER INDIRECT EXPENSES:** | **4,821,383** | **376,176** | **2,112,319** | **2,709,064** | **44%** | **298,373** |
| **TOTAL INDIRECT EXPENSES:** | **22,981,465** | **2,062,893** | **11,396,299** | **11,585,165** | **50%** | **94,433** |

# Washington State Bar Association

Statement of Activities

For the Period from March 01, 2026 to March 31, 2026

**50% OF YEAR COMPLETE**

| SUMMARY PAGE | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE |
|---|---|---|---|---|
| ACCESS TO JUSTICE | (369,448) | (36,663) | (149,346) | (220,102) |
| ADMISSIONS/BAR EXAM | (70,382) | 186,557 | 538,939 | (609,321) |
| ADVANCEMENT FTE | (322,209) | (26,286) | (157,798) | (164,410) |
| BAR NEWS | (184,871) | (9,160) | (61,582) | (123,289) |
| BENCH BAR PRESS | - | - | 1,350 | (1,350) |
| BOARD OF GOVERNORS | (656,550) | (66,529.80) | (257,901) | (398,649) |
| CONFERENCE & BROADCAST SERVICES | (83,138) | (7,264) | (41,533) | (41,604) |
| CHARACTER & FITNESS BOARD | (183,031) | (16,813) | (91,143) | (91,888) |
| CLE - PRODUCTS | 651,708 | 24,336 | 412,270 | 239,439 |
| CLE - SEMINARS | (521,923) | (65,674) | (333,998) | (187,925) |
| CLIENT PROTECTION FUND | 244,100 | 6,534 | 704,573 | (460,473) |
| COMMUNICATIONS | (927,116) | (65,293) | (389,384) | (537,731) |
| COMMUNICATIONS FTE | (257,458) | (23,174) | (130,572) | (126,886) |
| DESKBOOKS | (261,267) | (76,037) | (156,101) | (105,166) |
| DISCIPLINE | (6,714,684) | (596,946) | (3,231,497) | (3,483,187) |
| DIVERSITY | (266,146) | (31,413) | (31,479) | (234,667) |
| ENTITY REGULATION | (67,555) | (3,722) | (45,109) | (22,447) |
| FACILITIES & OPERATIONS | (749,267) | (66,845) | (383,159) | (366,108) |
| FINANCE | (630,173) | (38,425) | (296,742) | (333,431) |
| FOUNDATION | (194,625) | (18,005) | (93,261) | (101,365) |
| HUMAN RESOURCES | (540,066) | (61,333) | (343,016) | (197,050) |
| LAW CLERK PROGRAM | (20,825) | (31,648) | 133,304 | (154,129) |
| LEGISLATIVE | (295,591) | (26,879) | (144,962) | (150,629) |
| LEGAL LUNCHBOX | (34,025) | (3,918) | (3,829) | (30,195) |
| LICENSE FEES | 17,652,266 | 1,631,824 | 8,957,902 | 8,694,364 |
| LICENSING AND MEMBERSHIP | (336,145) | (22,253) | (102,894) | (233,251) |
| LIMITED LICENSE LEGAL TECHNICIAN | (61,045) | (4,997) | (25,826) | (35,219) |
| LIMITED PRACTICE OFFICERS | 56,640 | 7,236 | 40,704 | 15,936 |
| MANDATORY CLE ADMINISTRATION | 490,949 | 61,030 | 395,551 | 95,398 |
| MEMBER WELLNESS PROGRAM | (247,030) | (21,343) | (121,960) | (125,070) |
| MINI CLE | (134,341) | (11,380) | (66,343) | (67,998) |
| MEMBER SERVICES & ENGAGEMENT | (418,764) | (30,929) | (165,380) | (253,384) |
| NEW MEMBER EDUCATION | 20,022 | (3,404) | 39,452 | (19,430) |
| OFFICE OF GENERAL COUNSEL | (1,143,522) | (95,221) | (536,771) | (606,752) |
| OFFICE OF THE EXECUTIVE DIRECTOR | (1,074,655) | (91,827) | (582,405) | (492,251) |
| OGC-DISCIPLINARY BOARD | (346,788) | (50,446) | (176,822) | (169,966) |
| PRACTICE OF LAW BOARD | (115,055) | (8,929) | (49,457) | (65,598) |
| PRACTICE MANAGEMENT ASSISTANCE | (186,220) | (14,871) | (127,659) | (58,561) |
| PROFESSIONAL RESPONSIBILITY PROGRAM | (224,777) | (17,327) | (107,048) | (117,729) |
| PUBLIC SERVICE PROGRAMS | (190,189) | (28,597) | (132,275) | (57,914) |
| PUBLICATION & DESIGN SERVICES | (129,205) | (10,899) | (66,400) | (62,804) |
| REGULATORY SERVICES FTE | (438,062) | (37,038) | (206,961) | (231,101) |
| REGULATORY REFORM | (224,255) | (16,204) | (93,561) | (130,694) |
| SECTIONS ADMINISTRATION | (50,343) | (22,358) | 227,925 | (278,268) |
| SECTIONS OPERATIONS | (437,806) | (7,185) | 135,921 | (573,727) |
| TECHNOLOGY | (959,791) | (88,005) | (506,487) | (453,304) |
| VOLUNTEER EDUCATION | (289,837) | (31,440) | (139,381) | (150,455) |
| INDIRECT EXPENSES | 22,981,465 | 2,062,893 | 11,396,299 | 11,585,165 |
| **TOTAL OF ALL** | **(21,738,972)** | **(2,093,731)** | **(13,434,149)** | **(8,304,823)** |
| **NET INCOME (LOSS)** | **(1,242,493)** | **30,838** | **2,037,850** | **(3,280,343)** |

WASHINGTON STATE
BAR ASSOCIATION

# Financial Reports

## (Unaudited)

## Year to Date May 31, 2026

**Prepared by**
**Maggie Yu, Controller**

**Submitted by**
**Tiffany Lynch, Director of Finance**
**June 17, 2026**

# 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 May 31, 2026
As % of Completion to Annual Budget

| | % of Year | Current Year % YTD | Current Year $ Difference Favorable/(Unfavorable) | Prior Year YTD | Comments |
|---|---|---|---|---|---|
| **Total Salaries & Benefits** | **67%** | **68%** | **$(279,229)** | **66%** | **Unfavorable to budget due to higher salaries, medical cost, and timing of annual payment for transportation allowance.** |
| **Other Indirect Expenses*** | **67%** | **58%** | **$422,290** | **63%** | **Favorable to budget due to timing of expenses for legal fees, workplace benefits, and HR and IT direct expenses.** |
| **Total Indirect Expenses** | **67%** | **66%** | **$143,060** | **66%** | **Favorable to budget resulting from other indirect expenses described above.** |
| **General Fund Revenues** | **67%** | **74%** | **$1,714,504** | **72%** | **Favorable to budget due to higher revenue for licensing late fees, Pro Hac Vice, Law Clerk fees, bar exam fees and MCLE late fees, and timing of collection of reimbursements from sections.** |
| **General Fund Indirect Expenses** | **67%** | **66%** | **$145,158** | **66%** | **Favorable to budget as described for indirect expenses above.** |
| **General Fund Direct Expenses** | **67%** | **56%** | **$318,772** | **53%** | **Favorable to budget due to timing of program activities and meetings/events.** |
| **General Fund Net** | **67%** | **-271%** | **$2,178,434** | **158%** | **Favorable to budget for the reasons described above.** |
| **CLE Revenue** | **67%** | **60%** | **$(106,722)** | **71%** | **Unfavorable to budget due to lower seminar revenue and timing of collection of deskbook royalty payments.** |
| **CLE Direct Expenses** | **67%** | **38%** | **$126,432** | **36%** | **Favorable to budget due to timing of expenses for seminar activities.** |
| **CLE Indirect Expenses** | **67%** | **67%** | **$(2,881)** | **65%** | **Slightly unfavorable to budget due to quarterly vacation accrual adjustments and higher cost of medical benefits.** |
| **CLE Net** | **67%** | **54%** | **$16,829** | **94%** | **Favorable to budget due to timing of direct expenses.** |

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

**Washington State Bar Association Financial Summary**
**Compared to Fiscal Year 2026 Budget**
**For the Period from May 01, 2026 to May 31, 2026**

| Category | Actual Revenues | Budgeted Revenues | Actual Indirect Expenses | Budgeted Indirect Expenses | Actual Direct Expenses | Budgeted Direct Expenses | Actual Total Expenses | Budgeted Total Expenses | Actual Net Result | Budgeted Net Result |
|---|---|---|---|---|---|---|---|---|---|---|
| Access to Justice | - | - | 163,045 | 253,348 | 35,927 | 116,100 | 198,973 | 369,448 | (198,973) | (369,448) |
| Admissions/Bar Exam | 1,634,585 | 1,479,440 | 703,714 | 1,089,992 | 234,633 | 459,830 | 938,347 | 1,549,822 | 696,238 | (70,382) |
| Advancement FTE | | - | 210,222 | 315,609 | 140 | 6,600 | 210,363 | 322,209 | (210,363) | (322,209) |
| Bar News | 393,792 | 529,600 | 219,141 | 331,526 | 258,062 | 382,945 | 477,203 | 714,471 | (83,411) | (184,871) |
| Board of Governors | - | - | 159,143 | 238,885 | 228,813 | 417,665 | 387,956 | 656,550 | (387,956) | (656,550) |
| Conference & Broadcasting Services | - | - | 55,059 | 83,138 | - | - | 55,059 | 83,138 | (55,059) | (83,138) |
| Character & Fitness Board | - | - | 106,170 | 159,981 | 11,401 | 23,050 | 117,572 | 183,031 | (117,572) | (183,031) |
| Communications Strategies | 411 | 3,000 | 501,512 | 741,101 | 96,203 | 189,015 | 597,715 | 930,116 | (597,304) | (927,116) |
| Communications Strategies FTE | | - | 172,988 | 257,458 | - | - | 172,988 | 257,458 | (172,988) | (257,458) |
| Discipline | 62,996 | 85,000 | 4,261,788 | 6,614,175 | 107,605 | 185,509 | 4,369,393 | 6,799,684 | (4,306,397) | (6,714,684) |
| Diversity | 135,000 | 135,000 | 209,485 | 342,071 | 12,613 | 59,075 | 222,098 | 401,146 | (87,098) | (266,146) |
| Entity Regulation | 20,000 | 75,500 | 77,217 | 115,083 | 2,710 | 27,973 | 79,926 | 143,055 | (59,926) | (67,555) |
| Facilities & Operations | - | - | 507,942 | 746,702 | 1,594 | 2,565 | 509,536 | 749,267 | (509,536) | (749,267) |
| Finance | 495,347 | 600,000 | 807,285 | 1,225,253 | 3,220 | 4,920 | 810,505 | 1,230,173 | (315,158) | (630,173) |
| Foundation | - | - | 117,712 | 175,440 | 5,882 | 19,185 | 123,594 | 194,625 | (123,594) | (194,625) |
| Human Resources | - | - | 445,307 | 540,066 | - | - | 445,307 | 540,066 | (445,307) | (540,066) |
| Law Clerk Program | 264,033 | 224,000 | 113,599 | 177,416 | 42,902 | 67,409 | 156,501 | 244,825 | 107,532 | (20,825) |
| Legislative | - | - | 161,078 | 270,801 | 16,387 | 24,790 | 177,466 | 295,591 | (177,466) | (295,591) |
| Legal Lunchbox | 32,030 | 34,000 | 39,450 | 59,925 | 4,422 | 8,100 | 43,872 | 68,025 | (11,842) | (34,025) |
| Licensing and Membership Records | 440,417 | 494,260 | 530,726 | 807,725 | 23,095 | 22,680 | 553,821 | 830,405 | (113,404) | (336,145) |
| Licensing Fees | 11,967,761 | 17,652,266 | - | - | - | - | 0 | - | 11,967,761 | 17,652,266 |
| Limited License Legal Technician | 11,944 | 17,287 | 43,297 | 68,332 | 2,666 | 10,000 | 45,963 | 78,332 | (34,019) | (61,045) |
| Limited Practice Officers | 122,241 | 182,000 | 59,060 | 92,656 | 10,175 | 32,704 | 69,236 | 125,360 | 53,005 | 56,640 |
| Mandatory CLE | 1,061,550 | 1,338,250 | 470,897 | 694,269 | 97,703 | 153,032 | 568,600 | 847,301 | 492,950 | 490,949 |
| Member Wellness Program | 4,250 | 9,000 | 163,287 | 242,930 | 4,684 | 13,100 | 167,972 | 256,030 | (163,722) | (247,030) |
| Member Services & Engagement | 9,200 | 15,300 | 208,391 | 309,044 | 65,470 | 125,020 | 273,861 | 434,064 | (264,661) | (418,764) |
| Mini CLE | - | - | 88,211 | 134,341 | - | - | 88,211 | 134,341 | (88,211) | (134,341) |
| New Member Education | 119,936 | 142,000 | 77,946 | 118,278 | 2,473 | 3,700 | 80,420 | 121,978 | 39,516 | 20,022 |
| Office of General Counsel | 1,000 | - | 707,071 | 1,116,772 | 9,520 | 26,750 | 716,591 | 1,143,522 | (715,591) | (1,143,522) |
| Office of the Executive Director | - | - | 626,476 | 932,020 | 117,632 | 142,635 | 744,109 | 1,074,655 | (744,109) | (1,074,655) |
| OGC-Disciplinary Board | - | - | 141,941 | 210,543 | 99,486 | 136,245 | 241,427 | 346,788 | (241,427) | (346,788) |
| Practice of Law Board | - | - | 64,086 | 98,855 | 1,461 | 16,200 | 65,547 | 115,055 | (65,547) | (115,055) |
| Practice Management Assistance | 68,452 | 62,000 | 102,488 | 152,525 | 90,187 | 95,695 | 192,675 | 248,220 | (124,223) | (186,220) |
| Professional Responsibility Program | - | - | 140,451 | 216,787 | 2,602 | 7,990 | 143,053 | 224,777 | (143,053) | (224,777) |
| Public Service Programs | 132,639 | 132,635 | 189,118 | 310,124 | (1,934) | 12,700 | 187,184 | 322,824 | (54,545) | (190,189) |
| Publication and Design Services | - | - | 81,799 | 124,205 | 4,756 | 5,000 | 86,555 | 129,205 | (86,555) | (129,205) |
| Regulatory Services FTE | | | 272,526 | 425,472 | 1,404 | 12,590 | 273,930 | 438,062 | (273,930) | (438,062) |
| Regulatory Reform | - | - | 112,682 | 167,255 | 8,828 | 57,000 | 121,510 | 224,255 | (121,510) | (224,255) |
| Sections Administration | 393,947 | 275,000 | 213,423 | 322,943 | 484 | 2,400 | 213,907 | 325,343 | 180,040 | (50,343) |
| Volunteer Engagement | - | - | 165,362 | 253,536 | 15,668 | 36,301 | 181,030 | 289,836.58 | (181,030) | (289,837) |
| Technology | - | - | 694,659 | 959,791 | - | - | 694,659 | 959,791 | (694,659) | (959,791) |
| **Subtotal General Fund** | **17,371,530** | 23,485,538 | **14,185,755** | **21,496,370** | **1,618,876** | 2,906,473 | **15,804,632** | 24,402,843 | **1,566,898** | **(917,304)** |
| Expenses using Facilities Reserve funds | | | | | (496) | | (496) | (744) | 496 | 744 |
| Expenses using Special Project Reserve funds | | | (112,682) | | (8,828) | | (121,510) | (224,255) | 121,510 | 224,255 |
| **Total General Fund - Net Result from Operations** | **17,371,530** | | **14,073,073** | | **1,610,048** | | **15,682,625** | **24,177,844** | **1,688,905** | **(692,306)** |
| **Percentage of Budget** | **74%** | | **66%** | | **56%** | | **65%** | | | |
| CLE-Seminars and Products | 901,982 | 1,491,745 | 702,411 | 1,048,807 | 96,118 | 313,153 | 798,529 | 1,361,960 | 103,452 | 129,785 |
| CLE - Deskbooks | 55,873 | 105,120 | 161,013 | 242,008 | 69,138 | 124,380 | 230,151 | 366,387 | (174,278) | (261,267) |
| Total CLE | 957,854 | 1,596,865 | 863,424 | 1,290,814 | 165,256 | 437,533 | 1,028,680 | 1,728,347 | (70,826) | (131,482) |
| **Percentage of Budget** | **60%** | | **67%** | | **38%** | | **60%** | | - | - |
| Expenses using Facilities Reserve funds | | | | | | | 0 | | **(70,826)** | **(131,482)** |
| **Total CLE Fund - Net Result from Operations** | | | **863,424** | | | | **1,028,680** | **1,728,347** | | |
| Total All Sections | 668,073 | 653,316 | - | - | 654,110 | 1,091,122 | 654,110 | 1,091,122 | 13,963 | (437,806) |
| Bench Bar Press-Restricted | 6,885 | - | - | - | 7,060 | - | 7,060 | 0 | (175) | - |
| Client Protection Fund-Restricted | 870,614 | 945,480 | 128,736 | 194,280 | 42,614 | 507,100 | 171,350 | 701,380 | 699,264 | 244,100 |
| Expenses using Facilities Reserve funds | | | | | | | - | | - | - |
| **Total CPF Fund - Net Result from Operations** | | | **128,736** | | | | **171,350** | **701,380** | **699,264** | **244,100** |
| **Totals** | **19,868,071** | **26,681,199** | **15,177,916** | **22,981,465** | **2,480,856** | **4,942,227** | **17,658,772** | **27,923,692** | **2,209,124** | **(1,242,493)** |
| **Totals Net of Use of Facilities Reserve Funds** | | | - | | (496) | | (496) | | 496 | |
| **Totals Net of Use of Special Project Reserve Funds** | | | (112,682) | | (8,828) | | (121,510) | **27,698,693** | 121,510 | **(1,017,494)** |
| | | | **15,065,234** | | **2,472,028** | | **17,536,766** | | **2,331,130** | |
| **Percentage of Budget** | **74%** | | **66%** | | **50%** | | **63%** | | | |

| Summary of Fund Balances: | Fund Balances Sept. 30, 2025 | 2026 Budgeted Fund Balances | Fund Balances Year to date |
|---|---|---|---|
| ***Restricted Funds:*** | | | |
| Client Protection Fund | 5,307,092 | 5,551,192 | 6,006,356 |
| Bench Bar Press | 1,110 | 1,110 | 935 |
| ***Board-Designated Funds (Non-General Fund):*** | | | |
| CLE Fund Balance | 1,233,727 | 1,102,244 | 1,162,901 |
| Section Funds | 2,164,531 | 1,726,725 | 2,178,494 |
| ***Board-Designated Funds (General Fund):*** | | | |
| Operating Reserve Fund | 2,500,000 | 2,500,000 | 2,500,000 |
| Facilities Reserve Fund | 159,925 | 159,181 | 159,429 |
| Special Projects and Innovation Fund | 616,067 | 391,813 | 494,557 |
| ***Unrestricted Funds (General Fund):*** | | | |
| Unrestricted General Fund | 6,754,154 | 6,061,848 | 8,443,059 |
| **Total General Fund Balance** | **10,030,146** | **9,112,841** | **11,597,044** |
| **Net Change in Total General Fund Balance** | | **(917,304)** | **1,566,898** |
| **Total Fund Balance** | **18,736,606** | **17,494,113** | **20,945,730** |
| **Net Change In Fund Balance** | | **(1,242,493)** | **2,209,124** |

Washington State Bar Association
Analysis of Cash Investments
As of May 31, 2026

**Checking & Savings Accounts**

**General Fund**

**Checking**

| Bank | Account | Amount |
|---|---|---|
| Wells Fargo | General | 2,141,003 |
| | Total | |

| Investments | Rate (yield) | Amount |
|---|---|---|
| Wells Fargo Money Market | 3.54% | 12,647,229 |
| UBS Financial Money Market | 3.48% | 1,197,426 |
| CDs/Treasuries | see list | 10,250,000 |
| | **General Fund Total** | **26,235,659** |

**Client Protection Fund**

**Checking**

| Bank | Amount |
|---|---|
| Wells Fargo | 360,560 |

| Investments | Rate (yield) | Amount |
|---|---|---|
| Wells Fargo Money Market | 3.54% | 5,327,543 |
| CDs/Treasuries | see list | 500,000 |
| | **Client Protection Fund Total** | **6,188,103** |
| | **Grand Total Cash & Investments** | **32,423,762** |

Washington State Bar Association
Analysis of Cash Investments
As of May 31, 2026

**General Fund**

| Bank | Yield | Term Months | Trade Date | Settle Date | Maturity Date | Amount |
|---|---|---|---|---|---|---|
| Merrick Bank CD | 4.30% | 12 | 6/12/2025 | 6/20/2025 | 6/18/2026 | 250,000 |
| Simmons Bank/Pine Bluff CD | 4.20% | 12 | 6/12/2025 | 6/20/2025 | 6/18/2026 | 250,000 |
| Goldman Sachs Bank CD | 3.60% | 6 | 12/30/2025 | 1/6/2026 | 7/6/2026 | 250,000 |
| Bank of America CD | 3.60% | 6 | 12/30/2025 | 1/7/2026 | 7/7/2026 | 250,000 |
| BCB Community Bank NY CD | 4.05% | 12 | 7/7/2025 | 7/18/2025 | 7/17/2026 | 250,000 |
| Bank Hapoalim BM CD | 4.15% | 12 | 7/28/2025 | 7/31/2025 | 7/29/2026 | 250,000 |
| Bridgewater Bank CD | 3.70% | 6 | 1/29/2026 | 2/6/2026 | 8/6/2026 | 250,000 |
| Industrial & Com Bank CD | 3.70% | 6 | 1/29/2026 | 2/6/2026 | 8/6/2026 | 250,000 |
| Morgan Stanley PVT Bank CD | 4.05% | 12 | 8/6/2025 | 8/13/2025 | 8/13/2026 | 250,000 |
| Zions Bancorp NA CD | 3.70% | 9 | 1/29/2026 | 2/4/2026 | 11/4/2026 | 250,000 |
| Cross River Bank CD | 3.70% | 9 | 1/29/2026 | 2/6/2026 | 11/6/2026 | 250,000 |
| JP Morgan chase bank CD | 3.60% | 12 | 12/30/2025 | 1/7/2026 | 1/7/2027 | 250,000 |
| Bank of Baroda CD | 3.70% | 12 | 1/23/2026 | 1/28/2026 | 1/28/2027 | 250,000 |
| Ally Bank/UT CD | 3.60% | 12 | 1/23/2026 | 1/29/2026 | 1/29/2027 | 250,000 |
| BMW Bank North America CD | 3.65% | 12 | 1/23/2026 | 1/30/2026 | 1/29/2027 | 250,000 |
| CAPE & Coast Bank CD | 3.65% | 12 | 1/23/2026 | 1/30/2026 | 1/29/2027 | 250,000 |
| BMO Bank NA Primary | 3.85% | 9 | 4/28/2026 | 4/30/2026 | 2/1/2027 | 250,000 |
| Tristate Capital Bank | 3.80% | 9 | 4/28/2026 | 5/6/2026 | 2/8/2027 | 250,000 |
| Lake City Bank Warsaw CD | 3.80% | 12 | 2/10/2026 | 2/18/2026 | 2/18/2027 | 250,000 |
| PCB Bank Primary CD | 3.70% | 12 | 2/26/2026 | 3/6/2026 | 3/5/2027 | 250,000 |
| State Bank of India NY CD | 3.75% | 12 | 3/4/2026 | 3/9/2026 | 3/9/2027 | 250,000 |
| Towne Bank Portsmouth VA CD | 3.75% | 12 | 3/4/2026 | 3/13/2026 | 3/12/2027 | 250,000 |
| Stearns Bank NA CD | 3.90% | 11 | 4/15/2026 | 4/20/2026 | 3/22/2027 | 250,000 |
| Associated BK Green Bay CD | 3.80% | 12 | 3/24/2026 | 3/27/2026 | 3/25/2027 | 250,000 |
| First Reliance Bank CD | 3.75% | 12 | 3/24/2026 | 3/30/2026 | 3/30/2027 | 250,000 |
| Ocean Bank/Miami FL CD | 3.85% | 12 | 3/24/2026 | 3/30/2026 | 3/30/2027 | 250,000 |
| Seacoast National Bank CD | 3.80% | 12 | 3/24/2026 | 3/31/2026 | 3/31/2027 | 250,000 |
| Mission Valley Bank CD | 3.80% | 12 | 4/15/2026 | 4/17/2026 | 4/16/2027 | 250,000 |
| Bank of India NY CD | 3.90% | 12 | 4/15/2026 | 4/23/2026 | 4/21/2027 | 250,000 |
| Old National Bank CD | 3.90% | 12 | 4/15/2026 | 4/22/2026 | 4/22/2027 | 250,000 |
| Shinhan Bank America CD | 3.90% | 12 | 4/15/2026 | 4/24/2026 | 4/26/2027 | 250,000 |
| American Coml BK & TR CD | 3.85% | 12 | 4/15/2026 | 4/28/2026 | 4/28/2027 | 250,000 |
| Flagstar Bank National CD | 3.95% | 12 | 4/28/2026 | 4/30/2026 | 4/30/2027 | 250,000 |
| Regions BK Birmngham CD | 3.80% | 12 | 4/28/2026 | 5/5/2026 | 5/5/2027 | 250,000 |
| Bank Hope Los Angeles CD | 3.75% | 12 | 4/28/2026 | 5/6/2026 | 5/6/2027 | 250,000 |
| Eaglemark Savings Bank | 3.95% | 12 | 5/26/2026 | 5/27/2026 | 5/27/2027 | 250,000 |
| Nelnet Bank Inc. CD | 3.80% | 12 | 5/26/2026 | 5/27/2026 | 5/27/2027 | 250,000 |
| Bank of America CA CD | 3.95% | 12 | 5/26/2026 | 5/28/2026 | 5/28/2027 | 250,000 |
| First-Citizens Bank/Trst CD | 3.85% | 12 | 5/26/2026 | 5/28/2026 | 5/28/2027 | 250,000 |
| Mountainone Bank CD | 3.80% | 12 | 5/26/2026 | 5/29/2026 | 5/29/2027 | 250,000 |
| Western Alliance Bank CD | 3.85% | 12 | 5/26/2026 | 5/29/2026 | 5/29/2027 | 250,000 |
| | | | | | **Total** | **10,250,000** |

**Client Fund Protection Fund**

| Bank | Yield | Term Months | Trade Date | Settle Date | Maturity Date | Amount |
|---|---|---|---|---|---|---|
| SOFI Bank NA Corp CD | 3.70% | 6 | 1/23/2026 | 2/4/2026 | 8/4/2026 | 250,000 |
| SAFRA National Bank CD | 3.65% | 11 | 1/23/2026 | 1/29/2026 | 12/29/2026 | 250,000 |
| | | | | | **Total** | **500,000** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## LICENSE FEES

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| LICENSE FEES | 17,652,266 | 1,495,314 | 11,967,761 | 5,684,505 | 68% | 199,583 |
| **TOTAL REVENUE:** | **17,652,266** | **1,495,314** | **11,967,761** | **5,684,505** | **68%** | **199,583** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## ADMISSIONS

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| EXAM SOFTWARE REVENUE | 9,500 | - | 7,205 | 2,295 | 76% | 872 |
| BAR EXAM FEES | 1,395,000 | 131,980 | 1,588,620 | (193,620) | 114% | 658,620 |
| RULE 9/LEGAL INTERN FEES | 13,000 | 4,500 | 10,000 | 3,000 | 77% | 1,333 |
| SPECIAL ADMISSIONS | 61,940 | 2,040 | 28,760 | 33,180 | 46% | (12,533) |
| **TOTAL REVENUE:** | **1,479,440** | **138,520** | **1,634,585** | **(155,145)** | **110%** | **648,292** |
| **DIRECT EXPENSES:** | | | | | | |
| POSTAGE | 2,900 | 285 | 2,628 | 272 | 91% | (695) |
| STAFF TRAVEL/PARKING | 24,000 | - | 9,139 | 14,861 | 38% | 6,861 |
| STAFF MEMBERSHIP DUES | 495 | - | 245 | 250 | 49% | 85 |
| SUPPLIES | 2,500 | - | 1,044 | 1,456 | 42% | 622 |
| FACILITY, PARKING, FOOD | 150,985 | - | 46,969 | 104,016 | 31% | 53,688 |
| EXAM GRADING | 43,750 | - | 21,750 | 22,000 | 50% | 7,417 |
| UBE EXAMINATIONS | 46,200 | - | 40,859 | 5,341 | 88% | (10,059) |
| BOARD OF BAR EXAMINERS | 45,000 | 418 | 8,012 | 36,988 | 18% | 21,988 |
| BAR EXAM PROCTORS | 10,000 | - | 8,486 | 1,514 | 85% | (1,820) |
| DISABILITY ACCOMMODATIONS | 75,000 | 5,853 | 51,277 | 23,723 | 68% | (1,277) |
| CHARACTER & FITNESS INVESTIGATIONS | 1,500 | - | - | 1,500 | 0% | 1,000 |
| LAW SCHOOL VISITS | 1,500 | - | 23 | 1,477 | 2% | 977 |
| SOFTWARE HOSTING | 45,000 | 5,008 | 36,072 | 8,928 | 80% | (6,072) |
| STAFF CONFERENCE & TRAINING | 11,000 | 655 | 8,127 | 2,873 | 74% | (794) |
| **TOTAL DIRECT EXPENSES:** | **459,830** | **12,219** | **234,633** | **225,197** | **51%** | **71,921** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (7.45 FTE) ** | 635,395 | 54,313 | 415,922 | 219,473 | 65% | 7,675 |
| BENEFITS EXPENSE | 198,059 | 17,726 | 139,444 | 58,615 | 70% | (7,405) |
| OTHER INDIRECT EXPENSE | 256,539 | 12,039 | 148,348 | 108,191 | 58% | 22,678 |
| **TOTAL INDIRECT EXPENSES:** | **1,089,992** | **84,079** | **703,714** | **386,279** | **65%** | **22,948** |
| **TOTAL ALL EXPENSES:** | **1,549,822** | **96,297** | **938,347** | **611,476** | **61%** | **94,868** |
| **NET INCOME (LOSS):** | **(70,382)** | **42,223** | **696,238** | **(766,621)** | **-989%** | **743,160** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## ADVANCEMENT FTE

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF CONFERENCE & TRAINING | 6,600 | - | 140 | 6,460 | 2% | 4,260 |
| **TOTAL DIRECT EXPENSES:** | **6,600** | **-** | **140** | **6,460** | **2%** | **4,260** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.41 FTE) | 216,525 | 18,420 | 146,802 | 69,723 | 68% | (2,452) |
| BENEFITS EXPENSE | 50,531 | 4,507 | 35,278 | 15,253 | 70% | (1,590) |
| OTHER INDIRECT EXPENSE | 48,553 | 2,284 | 28,143 | 20,410 | 58% | 4,226 |
| **TOTAL INDIRECT EXPENSES:** | **315,609** | **25,211** | **210,222** | **105,386** | **67%** | **183** |
| **TOTAL ALL EXPENSES:** | **322,209** | **25,211** | **210,363** | **111,846** | **65%** | **4,443** |
| **NET INCOME (LOSS):** | **(322,209)** | **(25,211)** | **(210,363)** | **(111,846)** | **65%** | **4,443** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 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 | - | - | 6,000 | 0% | 4,000 |
| LEADERSHIP TRAINING | 10,000 | 5,197 | 8,647 | 1,353 | 86% | (1,980) |
| ATJ BOARD EXPENSE ** | 51,900 | - | 4,677 | 47,223 | 9% | 29,923 |
| STAFF TRAVEL/PARKING | 2,800 | 18 | 319 | 2,482 | 11% | 1,548 |
| STAFF CONFERENCE & TRAINING | 4,400 | - | 3,662 | 738 | 83% | (729) |
| PUBLIC DEFENSE ** | 11,000 | 3,815 | 7,921 | 3,079 | 72% | (588) |
| RECEPTION/FORUM EXPENSE | 30,000 | - | 10,701 | 19,299 | 36% | 9,299 |
| **TOTAL DIRECT EXPENSES:** | **116,100** | **9,030** | **35,927** | **80,173** | **31%** | **41,473** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.61 FTE) ** | 152,635 | 12,462 | 99,847 | 52,788 | 65% | 1,910 |
| BENEFITS EXPENSE | 45,272 | 3,965 | 30,945 | 14,327 | 68% | (763) |
| OTHER INDIRECT EXPENSE | 55,440 | 2,603 | 32,253 | 23,187 | 58% | 4,707 |
| **TOTAL INDIRECT EXPENSES:** | **253,348** | **19,030** | **163,045** | **90,303** | **64%** | **5,853** |
| **TOTAL ALL EXPENSES:** | **369,448** | **28,061** | **198,973** | **170,475** | **54%** | **47,326** |
| **NET INCOME (LOSS):** | **(369,448)** | **(28,061)** | **(198,973)** | **(170,475)** | **54%** | **47,326** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## BENCH-BAR-PRESS

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| LUNCHEON REGISTRATION | - | - | 4,485 | (4,485) | | 4,485 |
| BENCH-BAR-PRESS MEMBERSHIP DUES | - | 600 | 2,400 | (2,400) | | 2,400 |
| **TOTAL REVENUE:** | **-** | **600** | **6,885** | **(6,885)** | | **6,885** |
| **DIRECT EXPENSES:** | | | | | | |
| BENCH-BAR-PRESS LUNCHEON | - | - | 7,060 | (7,060) | | (7,060) |
| **TOTAL DIRECT EXPENSES:** | **-** | **-** | **7,060** | **(7,060)** | | **(7,060)** |
| **NET INCOME (LOSS):** | **-** | **600** | **(175)** | **175** | | **(175)** |

# Washington State Bar Association

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For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 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% | (1,333) |
| BNEWS DISPLAY ADVERTISING | 405,000 | - | 306,786 | 98,214 | 76% | 36,786 |
| BNEWS SUBSCRIPT/SINGLE ISSUES | 100 | - | 140 | (40) | 140% | 74 |
| BNEWS CLASSIFIED ADVERTISING | 2,500 | 50 | 3,035 | (535) | 121% | 1,368 |
| JOB TARGET ADVERSTISING | 120,000 | 10,802 | 83,831 | 36,169 | 70% | 3,831 |
| **TOTAL REVENUE:** | **529,600** | **10,852** | **393,792** | **135,808** | **74%** | **40,725** |
| **DIRECT EXPENSES:** | | | | | | |
| POSTAGE | 135,000 | - | 99,094 | 35,906 | 73% | (9,094) |
| PRINTING, COPYING & MAILING | 242,000 | - | 157,616 | 84,384 | 65% | 3,717 |
| DIGITAL/ONLINE DEVELOPMENT | 2,000 | - | 353 | 1,647 | 18% | 981 |
| GRAPHICS/ARTWORK | 1,000 | - | - | 1,000 | 0% | 667 |
| EDITORIAL ADVIS COMMITTEE EXP | 300 | - | - | 300 | 0% | 200 |
| STAFF CONFERENCE & TRAINING | 2,200 | - | 999 | 1,201 | 45% | 468 |
| STAFF MEMBERSHIP DUES | 220 | - | - | 220 | 0% | 147 |
| SUBSCRIPTIONS | 225 | - | - | 225 | 0% | 150 |
| **TOTAL DIRECT EXPENSES:** | **382,945** | **-** | **258,062** | **124,883** | **67%** | **(2,766)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.13 FTE) | 199,151 | 16,700 | 135,176 | 63,975 | 68% | (2,408) |
| BENEFITS EXPENSE | 59,029 | 5,282 | 41,455 | 17,574 | 70% | (2,103) |
| OTHER INDIRECT EXPENSE | 73,346 | 3,450 | 42,509 | 30,837 | 58% | 6,388 |
| **TOTAL INDIRECT EXPENSES:** | **331,526** | **25,432** | **219,141** | **112,386** | **66%** | **1,877** |
| **TOTAL ALL EXPENSES:** | **714,471** | **25,432** | **477,203** | **237,268** | **67%** | **(889)** |
| **NET INCOME (LOSS):** | **(184,871)** | **(14,579)** | **(83,411)** | **(101,460)** | **45%** | **39,836** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 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 ** | 175,000 | 28,457 | 74,825 | 100,175 | 43% | 41,842 |
| BOG COMMITTEES' EXPENSES ** | 11,200 | 1,813 | 4,118 | 7,082 | 37% | 3,348 |
| BOG RETREAT | 40,000 | - | 31,539 | 8,461 | 79% | (4,872) |
| BOG CONFERENCE ATTENDANCE | 56,500 | 5,737 | 51,799 | 4,701 | 92% | (14,133) |
| BOG TRAVEL & OUTREACH ** | 70,000 | 7,676 | 55,488 | 14,512 | 79% | (8,821) |
| LEADERSHIP TRAINING | 15,000 | - | - | 15,000 | 0% | 10,000 |
| BOG ELECTIONS ** | 26,900 | - | 9,021 | 17,879 | 34% | 8,913 |
| PRESIDENT'S DINNER | 12,000 | 1,674 | 1,674 | 10,326 | 14% | 6,326 |
| NEW GOVERNOR ORIENTATION | 7,000 | - | - | 7,000 | 0% | 4,667 |
| PRESIDENT'S PHOTO | 3,300 | - | - | 3,300 | 0% | 2,200 |
| SUPPLIES | 765 | - | 350 | 415 | 46% | 160 |
| **TOTAL DIRECT EXPENSES:** | **417,665** | **45,357** | **228,813** | **188,852** | **55%** | **49,630** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.73 FTE) | 135,043 | 12,881 | 93,431 | 41,613 | 69% | (3,402) |
| BENEFITS EXPENSE | 44,269 | 4,060 | 31,363 | 12,906 | 71% | (1,851) |
| OTHER INDIRECT EXPENSE | 59,572 | 2,788 | 34,349 | 25,223 | 58% | 5,366 |
| **TOTAL INDIRECT EXPENSES:** | **238,885** | **19,729** | **159,143** | **79,742** | **67%** | **114** |
| **TOTAL ALL EXPENSES:** | **656,550** | **65,086** | **387,956** | **268,594** | **59%** | **49,744** |
| **NET INCOME (LOSS):** | **(656,550)** | **(65,086)** | **(387,956)** | **(268,594)** | **59%** | **49,744** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## CONFERENCE AND BROADCAST SERVICES

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.55 FTE) | 49,269 | 4,096 | 33,520 | 15,750 | 68% | (674) |
| BENEFITS EXPENSE | 14,930 | 1,339 | 10,555 | 4,374 | 71% | (602) |
| OTHER INDIRECT EXPENSE | 18,939 | 892 | 10,984 | 7,955 | 58% | 1,642 |
| TOTAL INDIRECT EXPENSES: | **83,138** | **6,327** | **55,059** | **28,078** | **66%** | **366** |
| NET INCOME (LOSS): | **(83,138)** | **(6,327)** | **(55,059)** | **(28,078)** | **66%** | **366** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## CHARACTER & FITNESS BOARD

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | **-** | **-** | **-** | **-** | | **-** |
| **DIRECT EXPENSES:** | | | | | | |
| CHARACTER & FITNESS BOARD EXP | 12,000 | - | 5,458 | 6,542 | 45% | 2,542 |
| COURT REPORTERS | 11,050 | - | 5,943 | 5,107 | 54% | 1,423 |
| **TOTAL DIRECT EXPENSES:** | **23,050** | **-** | **11,401** | **11,649** | **49%** | **3,965** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.85 FTE) | 103,891 | 8,686 | 70,528 | 33,364 | 68% | (1,267) |
| BENEFITS EXPENSE | 26,820 | 2,373 | 18,763 | 8,057 | 70% | (883) |
| OTHER INDIRECT EXPENSE | 29,270 | 1,369 | 16,879 | 12,390 | 58% | 2,634 |
| TOTAL INDIRECT EXPENSES: | **159,981** | **12,428** | **106,170** | **53,810** | **66%** | **484** |
| **TOTAL ALL EXPENSES:** | **183,031** | **12,428** | **117,572** | **65,459** | **64%** | **4,449** |
| **NET INCOME (LOSS):** | **(183,031)** | **(12,428)** | **(117,572)** | **(65,459)** | **64%** | **4,449** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 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 | 730,535 | 96,633 | 279,573 | 450,962 | 38% | (207,450) |
| SEMINAR REVENUE-OTHER | 32,500 | 11,950 | 27,950 | 4,550 | 86% | 6,283 |
| SEMINAR SPLITS W/ CLE | (150,000) | - | - | (150,000) | 0% | 100,000 |
| SHIPPING & HANDLING | 210 | - | 36 | 174 | 17% | (104) |
| COURSEBOOK SALES | 3,500 | - | 325 | 3,175 | 9% | (2,008) |
| DIGITAL VIDEO SALES | 875,000 | 18,842 | 594,097 | 280,903 | 68% | 10,764 |
| **TOTAL REVENUE:** | **1,491,745** | **127,425** | **901,982** | **589,763** | **60%** | **(92,515)** |
| **DIRECT EXPENSES:** | | | | | | |
| COURSEBOOK PRODUCTION | 150 | - | - | 150 | 0% | 100 |
| ONLINE EXPENSES | 54,000 | 6 | 17,862 | 36,138 | 33% | 18,138 |
| ACCREDITATION FEES | 2,500 | (72) | 1,896 | 604 | 76% | (229) |
| FACILITIES | 175,000 | 5,200 | 55,307 | 119,693 | 32% | 61,360 |
| DISABILITY ACCOMMODATIONS | 7,000 | - | 2,211 | 4,789 | 32% | 2,455 |
| SPEAKERS & PROGRAM DEVELOP | 45,700 | 5,302 | 12,534 | 33,166 | 27% | 17,933 |
| HONORARIA | 3,000 | - | - | 3,000 | 0% | 2,000 |
| CLE SEMINAR COMMITTEE | 200 | - | - | 200 | 0% | 133 |
| STAFF TRAVEL/PARKING | 16,500 | 1,098 | 3,820 | 12,680 | 23% | 7,180 |
| STAFF CONFERENCE & TRAINING | 3,700 | - | - | 3,700 | 0% | 2,467 |
| STAFF MEMBERSHIP DUES | 1,500 | - | 1,091 | 409 | 73% | (91) |
| SUBSCRIPTIONS | 1,300 | 796 | 796 | 504 | 61% | 71 |
| SUPPLIES | 1,000 | - | 41 | 959 | 4% | 626 |
| COST OF SALES - COURSEBOOKS | 300 | - | 27 | 273 | 9% | 173 |
| POSTAGE & DELIVERY-COURSEBOOKS | 200 | - | 28 | 172 | 14% | 105 |
| IT EXPENSE DUE TO GF | 1,103 | 69 | 506 | 597 | 46% | 229 |
| **TOTAL DIRECT EXPENSES:** | **313,153** | **12,398** | **96,118** | **217,035** | **31%** | **112,651** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (7.95 FTE) | 614,468 | 52,203 | 419,858 | 194,610 | 68% | (10,213) |
| BENEFITS EXPENSE | 202,492 | 18,224 | 143,563 | 58,929 | 71% | (8,568) |
| OTHER INDIRECT EXPENSE | 231,847 | 10,231 | 138,990 | 92,857 | 60% | 15,575 |
| **TOTAL INDIRECT EXPENSES:** | **1,048,807** | **80,658** | **702,411** | **346,396** | **67%** | **(3,207)** |
| **TOTAL ALL EXPENSES:** | **1,361,960** | **93,057** | **798,529** | **563,431** | **59%** | **109,444** |
| **NET INCOME (LOSS):** | **129,785** | **34,368** | **103,452** | **26,333** | **80%** | **16,929** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## CLIENT PROTECTION FUND

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| DONATIONS | - | - | 5,539 | (5,539) | | 5,539 |
| CPF RESTITUTION | 10,000 | 621 | 4,782 | 5,218 | 48% | (1,885) |
| CPF MEMBER ASSESSMENTS | 735,480 | 7,400 | 727,330 | 8,150 | 99% | 237,010 |
| INTEREST INCOME | 200,000 | 17,231 | 132,963 | 67,037 | 66% | (370) |
| **TOTAL REVENUE:** | **945,480** | **25,252** | **870,614** | **74,866** | **92%** | **240,294** |
| **DIRECT EXPENSES:** | | | | | | |
| BANK FEES | 500 | 3 | (57) | 557 | -11% | 390 |
| GIFTS TO INJURED CLIENTS | 500,000 | 20,300 | 40,050 | 459,950 | 8% | 293,283 |
| CPF BOARD EXPENSES | 2,000 | 37 | 902 | 1,098 | 45% | 432 |
| STAFF CONFERENCE & TRAINING | 4,400 | 1,519 | 1,519 | 2,881 | 35% | 1,414 |
| STAFF MEMBERSHIP DUES | 200 | - | 200 | - | 100% | (67) |
| **TOTAL DIRECT EXPENSES:** | **507,100** | **21,860** | **42,614** | **464,486** | **8%** | **295,453** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.23 FTE) | 117,501 | 9,759 | 80,028 | 37,473 | 68% | (1,694) |
| BENEFITS EXPENSE | 34,425 | 3,218 | 24,227 | 10,198 | 70% | (1,277) |
| OTHER INDIRECT EXPENSE | 42,355 | 1,986 | 24,481 | 17,873 | 58% | 3,755 |
| **TOTAL INDIRECT EXPENSES:** | **194,280** | **14,963** | **128,736** | **65,544** | **66%** | **784** |
| **TOTAL ALL EXPENSES:** | **701,380** | **36,823** | **171,350** | **530,030** | **24%** | **296,237** |
| **NET INCOME (LOSS):** | **244,100** | **(11,571)** | **699,264** | **(455,164)** | **286%** | **536,531** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 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 | 1,000 | 411 | 411 | 589 | 41% | (256) |
| WSBA LOGO MERCHANDISE SALES | 2,000 | - | - | 2,000 | 0% | (1,333) |
| **TOTAL REVENUE:** | **3,000** | **411** | **411** | **2,589** | **14%** | **(1,589)** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 5,895 | 198 | 1,584 | 4,311 | 27% | 2,346 |
| STAFF MEMBERSHIP DUES | 1,800 | - | 537 | 1,263 | 30% | 663 |
| SUBSCRIPTIONS | 4,520 | 1,213 | 3,342 | 1,178 | 74% | (329) |
| APEX | 52,500 | - | 380 | 52,120 | 1% | 34,620 |
| BAR LEADERS SUMMIT | 35,000 | 26,935 | 26,935 | 8,065 | 77% | (3,601) |
| 50 YEAR MEMBER TRIBUTE LUNCH | 38,000 | 1,674 | 1,674 | 36,326 | 4% | 23,660 |
| BAR OUTREACH ** | 22,000 | 9,263 | 27,676 | (5,676) | 126% | (13,010) |
| COMMUNICATIONS OUTREACH ** | 8,000 | 3,738 | 6,553 | 1,447 | 82% | (1,219) |
| STAFF CONFERENCE & TRAINING | 11,300 | - | 7,791 | 3,510 | 69% | (257) |
| AMBASSADOR TRAINING & TOWN HALLS | 10,000 | 4,482 | 19,732 | (9,732) | 197% | (13,065) |
| **TOTAL DIRECT EXPENSES:** | **189,015** | **47,502** | **96,203** | **92,812** | **51%** | **29,807** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (5.39 FTE) | 417,995 | 43,965 | 297,876 | 120,120 | 71% | (19,212) |
| BENEFITS EXPENSE | 137,502 | 12,112 | 96,370 | 41,132 | 70% | (4,702) |
| OTHER INDIRECT EXPENSE | 185,603 | 8,706 | 107,267 | 78,337 | 58% | 16,469 |
| **TOTAL INDIRECT EXPENSES:** | **741,101** | **64,783** | **501,512** | **239,588** | **68%** | **(7,445)** |
| **TOTAL ALL EXPENSES:** | **930,116** | **112,285** | **597,715** | **332,400** | **64%** | **22,362** |
| **NET INCOME (LOSS):** | **(927,116)** | **(111,874)** | **(597,304)** | **(329,811)** | **64%** | **20,773** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## COMMUNICATION STRATEGIES FTE

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.00 FTE) | 183,193 | 15,266 | 125,299 | 57,894 | 68% | (3,171) |
| BENEFITS EXPENSE | 39,830 | 3,522 | 27,706 | 12,124 | 70% | (1,152) |
| OTHER INDIRECT EXPENSE | 34,435 | 1,621 | 19,982 | 14,452 | 58% | 2,974 |
| TOTAL INDIRECT EXPENSES: | **257,458** | **20,409** | **172,988** | **84,470** | **67%** | **(1,349)** |
| NET INCOME (LOSS): | **(257,458)** | **(20,409)** | **(172,988)** | **(84,470)** | **67%** | **(1,349)** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **DESKBOOKS** | | | | | | |
| **REVENUE:** | | | | | | |
| DESKBOOK SALES | 5,120 | - | 3,386 | 1,734 | 66% | (27) |
| LEXIS/NEXIS ROYALTIES | 75,000 | 10,164 | 30,757 | 44,243 | 41% | (19,243) |
| SECTION PUBLICATION SALES | - | - | 70 | (70) | | 70 |
| CASEMAKER ROYALTIES | 25,000 | 11,781 | 21,659 | 3,341 | 87% | 4,992 |
| **TOTAL REVENUE:** | **105,120** | **21,945** | **55,873** | **49,247** | **53%** | **(14,207)** |
| **DIRECT EXPENSES:** | | | | | | |
| COST OF SALES - DESKBOOKS | 2,800 | - | 1,195 | 1,605 | 43% | 672 |
| DESKBOOK ROYALTIES | - | - | 193 | (193) | | (193) |
| STAFF CONFERENCES & TRAINING | 2,200 | - | 1,914 | 286 | 87% | (447) |
| POSTAGE & DELIVERY-DESKBOOKS | 300 | - | 21 | 279 | 7% | 179 |
| OBSOLETE INVENTORY | 118,700 | - | 65,597 | 53,103 | 55% | 13,537 |
| STAFF MEMBERSHIP DUES | 330 | - | 218 | 112 | 66% | 2 |
| SUBSCRIPTIONS | 50 | - | - | 50 | 0% | 33 |
| **TOTAL DIRECT EXPENSES:** | **124,380** | **-** | **69,138** | **55,242** | **56%** | **13,782** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.75 FTE) | 145,047 | 12,165 | 98,064 | 46,982 | 68% | (1,366) |
| BENEFITS EXPENSE | 45,925 | 4,121 | 32,282 | 13,643 | 70% | (1,665) |
| OTHER INDIRECT EXPENSE | 51,036 | 2,258 | 30,667 | 20,369 | 60% | 3,357 |
| **TOTAL INDIRECT EXPENSES:** | **242,008** | **18,543** | **161,013** | **80,995** | **67%** | **325** |
| **TOTAL ALL EXPENSES:** | **366,387** | **18,543** | **230,151** | **136,236** | **63%** | **14,107** |
| **NET INCOME (LOSS):** | **(261,267)** | **3,402** | **(174,278)** | **(86,989)** | **67%** | **(100)** |

# Washington State Bar Association

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**67% OF YEAR COMPLETE**

## DISCIPLINE

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| AUDIT REVENUE | 1,000 | 128 | 1,126 | (126) | 113% | 460 |
| RECOVERY OF DISCIPLINE COSTS | 65,000 | 6,207 | 45,820 | 19,180 | 70% | 2,487 |
| DISCIPLINE HISTORY SUMMARY | 19,000 | 2,160 | 16,050 | 2,950 | 84% | 3,383 |
| **TOTAL REVENUE:** | **85,000** | **8,495** | **62,996** | **22,004** | **74%** | **6,330** |
| **DIRECT EXPENSES:** | | | | | | |
| PUBLICATIONS PRODUCTION | 350 | - | - | 350 | 0% | 233 |
| STAFF TRAVEL/PARKING | 15,000 | 1,138 | 12,141 | 2,859 | 81% | (2,141) |
| STAFF MEMBERSHIP DUES | 7,659 | 239 | 7,695 | (36) | 100% | (2,589) |
| TELEPHONE | 3,000 | 225 | 1,614 | 1,386 | 54% | 386 |
| COURT REPORTERS | 66,200 | 7,499 | 37,034 | 29,166 | 56% | 7,099 |
| OUTSIDE COUNSEL/AIC | 500 | - | - | 500 | 0% | 333 |
| LITIGATION EXPENSES | 30,000 | 1,525 | 10,572 | 19,428 | 35% | 9,428 |
| DISABILITY EXPENSES | 15,000 | - | 4,696 | 10,304 | 31% | 5,304 |
| TRANSLATION SERVICES | 10,000 | 874 | 10,132 | (132) | 101% | (3,465) |
| STAFF CONFERENCE & TRAINING | 37,800 | 500 | 23,720 | 14,080 | 63% | 1,480 |
| **TOTAL DIRECT EXPENSES:** | **185,509** | **11,999** | **107,605** | **77,904** | **58%** | **16,067** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (39.00 FTE) | 4,131,360 | 336,693 | 2,696,007 | 1,435,353 | 65% | 58,233 |
| BENEFITS EXPENSE | 1,139,859 | 101,104 | 789,843 | 350,017 | 69% | (29,936) |
| OTHER INDIRECT EXPENSE | 1,342,955 | 62,978 | 775,938 | 567,017 | 58% | 119,366 |
| **TOTAL INDIRECT EXPENSES:** | **6,614,175** | **500,775** | **4,261,788** | **2,352,387** | **64%** | **147,662** |
| **TOTAL ALL EXPENSES:** | **6,799,684** | **512,775** | **4,369,393** | **2,430,291** | **64%** | **163,730** |
| **NET INCOME (LOSS):** | **(6,714,684)** | **(504,280)** | **(4,306,397)** | **(2,408,288)** | **64%** | **170,059** |

# Washington State Bar Association

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**67% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **DIVERSITY** | | | | | | |
| **REVENUE:** | | | | | | |
| DONATIONS | 135,000 | - | 135,000 | - | 100% | 45,000 |
| **TOTAL REVENUE:** | **135,000** | **-** | **135,000** | **-** | **100%** | **45,000** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 3,700 | 131 | 591 | 3,109 | 16% | 1,876 |
| STAFF MEMBERSHIP DUES | 775 | 175 | 605 | 170 | 78% | (88) |
| DEI COUNCIL | 7,600 | 690 | 2,607 | 4,993 | 34% | 2,460 |
| DIVERSITY EVENTS & PROJECTS ** | 33,600 | 378 | 5,519 | 28,081 | 16% | 16,881 |
| STAFF EQUITY LEADERSHIP LAB | 6,000 | 252 | 3,201 | 2,799 | 53% | 799 |
| STAFF CONFERENCE & TRAINING | 4,400 | 90 | 90 | 4,310 | 2% | 2,843 |
| CONSULTING SERVICES | 3,000 | - | - | 3,000 | 0% | 2,000 |
| **TOTAL DIRECT EXPENSE:** | **59,075** | **1,716** | **12,613** | **46,462** | **21%** | **26,770** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.24 FTE) ** | 198,124 | 16,244 | 120,698 | 77,426 | 61% | 11,384 |
| BENEFITS EXPENSE | 66,814 | 5,342 | 41,559 | 25,255 | 62% | 2,983 |
| OTHER INDIRECT EXPENSE | 77,134 | 3,612 | 47,228 | 29,906 | 61% | 4,195 |
| **TOTAL INDIRECT EXPENSES:** | **342,071** | **25,198** | **209,485** | **132,586** | **61%** | **18,562** |
| **TOTAL ALL EXPENSES:** | **401,146** | **26,914** | **222,098** | **179,048** | **55%** | **45,333** |
| **NET INCOME (LOSS):** | **(266,146)** | **(26,914)** | **(87,098)** | **(179,048)** | **33%** | **90,333** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

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**67% OF YEAR COMPLETE**

## ENTITY REGULATION

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| APPLICATION FEES | 28,000 | 5,000 | 20,000 | 8,000 | 71% | 1,333 |
| ANNUAL FEES | 47,500 | - | - | 47,500 | 0% | (31,667) |
| **TOTAL REVENUE:** | **75,500** | **5,000** | **20,000** | **55,500** | **26%** | **(30,333)** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF CONFERENCE & TRAINING | 4,400 | - | 1,551 | 2,849 | 35% | 1,383 |
| INVESTIGATION | 9,600 | - | - | 9,600 | 0% | 6,400 |
| OUTREACH & COMMUNICATION | 10,000 | - | - | 10,000 | 0% | 6,667 |
| SOFTWARE HOSTING | 3,973 | 373 | 1,159 | 2,813 | 29% | 1,489 |
| **TOTAL DIRECT EXPENSES:** | **27,973** | **373** | **2,710** | **25,263** | **10%** | **15,939** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.55 FTE) ** | 77,471 | 6,684 | 53,125 | 24,346 | 69% | (1,478) |
| BENEFITS EXPENSE | 18,673 | 1,672 | 13,108 | 5,566 | 70% | (659) |
| OTHER INDIRECT EXPENSE | 18,939 | 892 | 10,984 | 7,955 | 58% | 1,642 |
| **TOTAL INDIRECT EXPENSES:** | **115,083** | **9,248** | **77,217** | **37,866** | **67%** | **(495)** |
| **TOTAL ALL EXPENSES:** | **143,055** | **9,621** | **79,926** | **63,129** | **56%** | **15,444** |
| **NET INCOME (LOSS):** | **(67,555)** | **(4,621)** | **(59,926)** | **(7,629)** | **89%** | **(14,890)** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

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**67% OF YEAR COMPLETE**

| | FISCAL 2026 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 | 9,000 | 2,250 | 4,250 | 4,750 | 47% | (1,750) |
| ROYALTIES | 62,000 | 29,102 | 68,452 | (6,452) | 110% | 27,119 |
| **TOTAL REVENUE:** | **71,000** | **31,352** | **72,702** | **(1,702)** | **102%** | **25,369** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF MEMBERSHIP DUES | 1,385 | - | 1,201 | 184 | 87% | (278) |
| MEMBER WELLNESS COUNCIL | 4,500 | 1,433 | 1,850 | 2,650 | 41% | 1,150 |
| LEGAL TECH TASK FORCE | 3,500 | - | - | 3,500 | 0% | 2,333 |
| STAFF TRAVEL/PARKING | 7,700 | - | 2,391 | 5,309 | 31% | 2,743 |
| STAFF CONFERENCE & TRAINING | 10,300 | - | 2,756 | 7,544 | 27% | 4,111 |
| SUBSCRIPTIONS | 1,400 | 111 | 884 | 516 | 63% | 50 |
| CPE COMMITTEE | 1,000 | 407 | 580 | 420 | 58% | 87 |
| VLEX FASTCASE | 87,000 | - | 87,812 | (812) | 101% | (29,812) |
| **TOTAL DIRECT EXPENSES:** | **116,785** | **1,950** | **97,474** | **19,311** | **83%** | **(19,617)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (3.51 FTE) | 385,777 | 33,411 | 262,790 | 122,987 | 68% | (5,605) |
| BENEFITS EXPENSE | 105,599 | 9,338 | 73,622 | 31,977 | 70% | (3,223) |
| OTHER INDIRECT EXPENSE | 120,866 | 5,666 | 69,815 | 51,051 | 58% | 10,763 |
| **TOTAL INDIRECT EXPENSES:** | **612,242** | **48,415** | **406,226** | **206,015** | **66%** | **1,935** |
| **TOTAL ALL EXPENSES:** | **729,027** | **50,364** | **503,700** | **225,326** | **69%** | **(17,682)** |
| **NET INCOME (LOSS):** | **(658,027)** | **(19,012)** | **(430,998)** | **(227,028)** | **65%** | **7,686** |

# Washington State Bar Association

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**67% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **FACILITIES & OPERATIONS** | | | | | | |
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 2,376 | 198 | 1,584 | 792 | 67% | - |
| STAFF CONFERENCE & TRAINING | - | 10 | 10 | (10) | | (10) |
| STAFF MEMBERSHIP DUES | 189 | - | - | 189 | 0% | 126 |
| **TOTAL DIRECT EXPENSES:** | **2,565** | **208** | **1,594** | **971** | **62%** | **116** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (5.78 FTE) | 406,195 | 36,199 | 290,727 | 115,468 | 72% | (19,930) |
| BENEFITS EXPENSE | 141,474 | 12,846 | 102,314 | 39,160 | 72% | (7,998) |
| OTHER INDIRECT EXPENSE | 199,033 | 9,327 | 114,901 | 84,132 | 58% | 17,788 |
| **TOTAL INDIRECT EXPENSES:** | **746,702** | **58,373** | **507,942** | **238,760** | **68%** | **(10,141)** |
| **TOTAL ALL EXPENSES:** | **749,267** | **58,581** | **509,536** | **239,731** | **68%** | **(10,025)** |
| **NET INCOME (LOSS):** | **(749,267)** | **(58,581)** | **(509,536)** | **(239,731)** | **68%** | **(10,025)** |

# Washington State Bar Association

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**67% OF YEAR COMPLETE**

## FINANCE

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| INTEREST INCOME | 600,000 | 83,772 | 495,347 | 104,653 | 83% | 95,347 |
| **TOTAL REVENUE:** | **600,000** | **83,772** | **495,347** | **104,653** | **83%** | **95,347** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 3,750 | 54 | 2,990 | 760 | 80% | (490) |
| STAFF CONFERENCE & TRAINING | 500 | - | - | 500 | 0% | 333 |
| STAFF MEMBERSHIP DUES | 670 | - | 230 | 440 | 34% | 217 |
| **TOTAL DIRECT EXPENSES:** | **4,920** | **54** | **3,220** | **1,700** | **65%** | **60** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (6.92 FTE) | 777,786 | 61,791 | 522,289 | 255,496 | 67% | (3,765) |
| BENEFITS EXPENSE | 209,178 | 18,176 | 147,321 | 61,858 | 70% | (7,869) |
| OTHER INDIRECT EXPENSE | 238,288 | 11,174 | 137,675 | 100,613 | 58% | 21,184 |
| **TOTAL INDIRECT EXPENSES:** | **1,225,253** | **91,141** | **807,285** | **417,968** | **66%** | **9,550** |
| **TOTAL ALL EXPENSES:** | **1,230,173** | **91,195** | **810,505** | **419,668** | **66%** | **9,610** |
| **NET INCOME (LOSS):** | **(630,173)** | **(7,424)** | **(315,158)** | **(315,015)** | **50%** | **104,957** |

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**67% OF YEAR COMPLETE**

| | FISCAL 2026 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 | 3,350 | - | 3,350 | - | 100% | (1,117) |
| PRINTING & COPYING | 1,000 | - | 30 | 970 | 3% | 637 |
| STAFF TRAVEL/PARKING | 4,000 | 207 | 312 | 3,688 | 8% | 2,354 |
| SUPPLIES | 2,000 | - | 112 | 1,888 | 6% | 1,221 |
| BOARD OF TRUSTEES | 3,600 | 150 | 250 | 3,350 | 7% | 2,150 |
| EQUIPMENT/HARDWARE/SOFTWARE | 2,635 | 220 | 1,758 | 877 | 67% | (2) |
| POSTAGE | 400 | - | - | 400 | 0% | 267 |
| STAFF CONFERENCE & TRAINING | 2,200 | - | 69 | 2,131 | 3% | 1,398 |
| **TOTAL DIRECT EXPENSES:** | **19,185** | **577** | **5,882** | **13,303** | **31%** | **6,908** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.05 FTE) | 108,755 | 9,828 | 75,554 | 33,201 | 69% | (3,051) |
| BENEFITS EXPENSE | 30,528 | 2,744 | 21,306 | 9,223 | 70% | (954) |
| OTHER INDIRECT EXPENSE | 36,156 | 1,693 | 20,852 | 15,305 | 58% | 3,253 |
| **TOTAL INDIRECT EXPENSES:** | **175,440** | **14,265** | **117,712** | **57,728** | **67%** | **(752)** |
| **TOTAL ALL EXPENSES:** | **194,625** | **14,842** | **123,594** | **71,032** | **64%** | **6,156** |
| **NET INCOME (LOSS):** | **(194,625)** | **(14,842)** | **(123,594)** | **(71,032)** | **64%** | **6,156** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 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 | - | 114 | 186 | 38% | 86 |
| STAFF MEMBERSHIP DUES | 1,200 | - | 852 | 348 | 71% | (52) |
| SUBSCRIPTIONS | 2,000 | - | 1,192 | 808 | 60% | 142 |
| STAFF TRAINING- GENERAL | 29,300 | - | 3,764 | 25,536 | 13% | 15,769 |
| RECRUITING AND ADVERTISING | 8,750 | 60 | 1,913 | 6,837 | 22% | 3,920 |
| HR INFORMATION SYSTEM | 65,950 | 4,294 | 44,517 | 21,433 | 68% | (550) |
| SALARY SURVEYS | 3,000 | - | 934 | 2,066 | 31% | 1,066 |
| CONSULTING SERVICES | 1,000 | - | - | 1,000 | 0% | 667 |
| STAFF CONFERENCE & TRAINING | 4,200 | - | 2,895 | 1,305 | 69% | (95) |
| TRANSFER TO INDIRECT EXPENSE | (115,700) | (4,354) | (56,181) | (59,519) | 49% | (20,952) |
| **TOTAL DIRECT EXPENSES:** | - | - | - | - | | - |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.00 FTE) | 504,229 | 32,020 | 283,658 | 220,571 | 56% | 52,495 |
| ALLOWANCE FOR OPEN POSITIONS | (200,000) | - | - | (200,000) | 0% | (133,333) |
| BENEFITS EXPENSE | 98,098 | 9,924 | 81,999 | 16,099 | 84% | (16,600) |
| OTHER INDIRECT EXPENSE | 137,739 | 6,463 | 79,650 | 58,089 | 58% | 12,176 |
| **TOTAL INDIRECT EXPENSES:** | **540,066** | **48,407** | **445,307** | **94,759** | **82%** | **(85,263)** |
| **TOTAL ALL EXPENSES:** | **540,066** | **48,407** | **445,307** | **94,759** | **82%** | **(85,263)** |
| **NET INCOME (LOSS):** | **(540,066)** | **(48,407)** | **(445,307)** | **(94,759)** | **82%** | **(85,263)** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## LAW CLERK PROGRAM

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| LAW CLERK FEES | 220,000 | 1,000 | 259,333 | (39,333) | 118% | 112,667 |
| LAW CLERK APPLICATION FEES | 4,000 | 200 | 4,700 | (700) | 118% | 2,033 |
| **TOTAL REVENUE:** | **224,000** | **1,200** | **264,033** | **(40,033)** | **118%** | **114,700** |
| **DIRECT EXPENSES:** | | | | | | |
| SUBSCRIPTIONS | 331 | - | - | 331 | 0% | 221 |
| DEPRECIATION | 37,278 | 2,907 | 23,263 | 14,015 | 62% | 1,589 |
| CHARACTER & FITNESS INVESTIGATIONS | 100 | - | - | 100 | 0% | 67 |
| LAW CLERK BOARD EXPENSE | 9,000 | - | 5,238 | 3,762 | 58% | 762 |
| SOFTWARE HOSTING | 700 | 95 | 696 | 4 | 99% | (230) |
| LAW CLERK OUTREACH | 20,000 | - | 13,705 | 6,295 | 69% | (372) |
| **TOTAL DIRECT EXPENSES:** | **67,409** | **3,002** | **42,902** | **24,507** | **64%** | **2,037** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.18 FTE) ** | 104,845 | 8,599 | 67,939 | 36,905 | 65% | 1,957 |
| BENEFITS EXPENSE | 31,938 | 2,835 | 22,263 | 9,675 | 70% | (971) |
| OTHER INDIRECT EXPENSE | 40,633 | 1,901 | 23,397 | 17,236 | 58% | 3,692 |
| **TOTAL INDIRECT EXPENSES:** | **177,416** | **13,335** | **113,599** | **63,817** | **64%** | **4,678** |
| **TOTAL ALL EXPENSES:** | **244,825** | **16,337** | **156,501** | **88,324** | **64%** | **6,716** |
| **NET INCOME (LOSS):** | **(20,825)** | **(15,137)** | **107,532** | **(128,357)** | **-516%** | **121,416** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## LICENSING & MEMBERSHIP RECORDS

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| STATUS CERTIFICATE FEES | 29,000 | 3,023 | 23,273 | 5,727 | 80% | 3,939 |
| INVESTIGATION FEES | 25,000 | 2,400 | 14,180 | 10,820 | 57% | (2,487) |
| PRO HAC VICE | 435,000 | 62,244 | 397,578 | 37,422 | 91% | 107,578 |
| MEMBER CONTACT INFORMATION | 5,000 | 601 | 4,930 | 70 | 99% | 1,597 |
| PHOTO BAR CARD SALES | 260 | 48 | 456 | (196) | 175% | 283 |
| **TOTAL REVENUE:** | **494,260** | **68,316** | **440,417** | **53,843** | **89%** | **110,910** |
| **DIRECT EXPENSES:** | | | | | | |
| POSTAGE | 4,000 | 2,966 | 5,110 | (1,110) | 128% | (2,443) |
| SOFTWARE HOSTING | 18,380 | 2,464 | 17,985 | 395 | 98% | (5,732) |
| INVESTIGATION | 300 | - | - | 300 | 0% | 200 |
| **TOTAL DIRECT EXPENSES:** | **22,680** | **5,430** | **23,095** | **(415)** | **102%** | **(7,975)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.78 FTE) ** | 503,843 | 40,135 | 338,221 | 165,622 | 67% | (2,325) |
| BENEFITS EXPENSE | 139,284 | 12,302 | 97,339 | 41,945 | 70% | (4,483) |
| OTHER INDIRECT EXPENSE | 164,598 | 7,724 | 95,166 | 69,433 | 58% | 14,566 |
| **TOTAL INDIRECT EXPENSES:** | **807,725** | **60,161** | **530,726** | **277,000** | **66%** | **7,758** |
| **TOTAL ALL EXPENSES:** | **830,405** | **65,591** | **553,821** | **276,585** | **67%** | **(217)** |
| **NET INCOME (LOSS):** | **(336,145)** | **2,725** | **(113,404)** | **(222,741)** | **34%** | **110,693** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **LIMITED LICENSE LEGAL TECHNICIAN PROGRAM** | | | | | | |
| **REVENUE:** | | | | | | |
| LLLT LICENSE FEES | 17,000 | 1,402 | 10,773 | 6,227 | 63% | (560) |
| LLLT LATE LICENSE FEES | 137 | 30 | 571 | (434) | 417% | 480 |
| MCLE LATE FEES | 150 | - | 600 | (450) | 400% | 500 |
| **TOTAL REVENUE:** | **17,287** | **1,432** | **11,944** | **5,343** | **69%** | **419** |
| **DIRECT EXPENSES:** | | | | | | |
| LLLT BOARD | 9,000 | 491 | 2,666 | 6,334 | 30% | 3,334 |
| LLLT EDUCATION | 1,000 | - | - | 1,000 | 0% | 667 |
| **TOTAL DIRECT EXPENSES:** | **10,000** | **491** | **2,666** | **7,334** | **27%** | **4,001** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.43 FTE) ** | 41,479 | 2,259 | 26,544 | 14,935 | 64% | 1,109 |
| BENEFITS EXPENSE | 12,046 | 1,000 | 8,282 | 3,764 | 69% | (251) |
| OTHER INDIRECT EXPENSE | 14,807 | 689 | 8,472 | 6,335 | 57% | 1,400 |
| **TOTAL INDIRECT EXPENSES:** | **68,332** | **3,948** | **43,297** | **25,035** | **63%** | **2,257** |
| **TOTAL ALL EXPENSES:** | **78,332** | **4,439** | **45,963** | **32,369** | **59%** | **6,258** |
| **NET INCOME (LOSS):** | **(61,045)** | **(3,008)** | **(34,019)** | **(27,026)** | **56%** | **6,677** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## LIMITED PRACTICE OFFICERS

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| INVESTIGATION FEES | 1,000 | 300 | 800 | 200 | 80% | 133 |
| MCLE LATE FEES | 3,000 | - | 5,475 | (2,475) | 183% | 3,475 |
| LPO EXAMINATION FEES | 18,000 | - | 11,900 | 6,100 | 66% | (100) |
| LPO LICENSE FEES | 158,000 | 13,089 | 100,286 | 57,714 | 63% | (5,048) |
| LPO LATE LICENSE FEES | 2,000 | 30 | 3,780 | (1,780) | 189% | 2,447 |
| **TOTAL REVENUE:** | **182,000** | **13,419** | **122,241** | **59,759** | **67%** | **907** |
| **DIRECT EXPENSES:** | | | | | | |
| FACILITY, PARKING, FOOD | 9,500 | - | 2,696 | 6,804 | 28% | 3,637 |
| EXAM WRITING | 15,000 | - | 4,200 | 10,800 | 28% | 5,800 |
| LPO BOARD | 4,000 | 163 | 430 | 3,570 | 11% | 2,237 |
| LPO OUTREACH | 500 | - | - | 500 | 0% | 333 |
| PRINTING & COPYING | 200 | - | 65 | 135 | 32% | 69 |
| SUPPLIES | 100 | - | - | 100 | 0% | 67 |
| SOFTWARE HOSTING | 3,404 | 382 | 2,785 | 619 | 82% | (515) |
| **TOTAL DIRECT EXPENSES:** | **32,704** | **544** | **10,175** | **22,529** | **31%** | **11,628** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.58 FTE) ** | 56,369 | 3,288 | 36,226 | 20,144 | 64% | 1,354 |
| BENEFITS EXPENSE | 16,315 | 1,374 | 11,292 | 5,023 | 69% | (415) |
| OTHER INDIRECT EXPENSE | 19,972 | 937 | 11,543 | 8,429 | 58% | 1,772 |
| **TOTAL INDIRECT EXPENSES:** | **92,656** | **5,599** | **59,060** | **33,596** | **64%** | **2,710** |
| **TOTAL ALL EXPENSES:** | **125,360** | **6,143** | **69,236** | **56,124** | **55%** | **14,338** |
| **NET INCOME (LOSS):** | **56,640** | **7,276** | **53,005** | **3,635** | **94%** | **15,245** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 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 | - | 157 | 2,343 | 6% | 1,509 |
| STAFF MEMBERSHIP DUES | 215 | - | - | 215 | 0% | 143 |
| JUD RECOMMEND COMMITTEE | 3,250 | - | 1,096 | 2,154 | 34% | 1,071 |
| SUBSCRIPTIONS | 2,000 | - | 1,990 | 10 | 99% | (657) |
| TELEPHONE | 575 | 50 | 397 | 178 | 69% | (13) |
| CONTRACT LOBBYIST | 12,500 | - | 12,500 | - | 100% | (4,167) |
| LEGISLATIVE REVIEW COMMITTEE | 1,250 | - | - | 1,250 | 0% | 833 |
| BOG LEGISLATIVE COMMITTEE | 300 | - | - | 300 | 0% | 200 |
| STAFF CONFERENCE & TRAINING | 2,200 | - | 248 | 1,952 | 11% | 1,219 |
| **TOTAL DIRECT EXPENSES:** | **24,790** | **50** | **16,387** | **8,403** | **66%** | **139** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.70 FTE) | 164,492 | 7,481 | 95,737 | 68,755 | 58% | 13,924 |
| BENEFITS EXPENSE | 47,770 | 3,342 | 31,551 | 16,219 | 66% | 296 |
| OTHER INDIRECT EXPENSE | 58,539 | 2,743 | 33,791 | 24,748 | 58% | 5,235 |
| **TOTAL INDIRECT EXPENSES:** | **270,801** | **13,566** | **161,078** | **109,723** | **59%** | **19,456** |
| **TOTAL ALL EXPENSES:** | **295,591** | **13,616** | **177,466** | **118,125** | **60%** | **19,595** |
| **NET INCOME (LOSS):** | **(295,591)** | **(13,616)** | **(177,466)** | **(118,125)** | **60%** | **19,595** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **MANDATORY CONTINUING LEGAL EDUCATION** | | | | | | |
| **REVENUE:** | | | | | | |
| ACTIVITY APPLICATION FEE | 670,000 | 56,700 | 462,000 | 208,000 | 69% | 15,333 |
| ACTIVITY APPLICATION LATE FEE | 250,000 | 22,400 | 175,050 | 74,950 | 70% | 8,383 |
| MCLE LATE FEES | 232,000 | 19,050 | 283,975 | (51,975) | 122% | 129,308 |
| ANNUAL ACCREDITED SPONSOR FEES | 36,250 | - | 35,750 | 500 | 99% | 11,583 |
| ATTENDANCE LATE FEES | 120,000 | 11,250 | 76,300 | 43,700 | 64% | (3,700) |
| COMITY CERTIFICATES | 30,000 | 625 | 28,475 | 1,525 | 95% | 8,475 |
| **TOTAL REVENUE:** | **1,338,250** | **110,025** | **1,061,550** | **276,700** | **79%** | **169,383** |
| **DIRECT EXPENSES:** | | | | | | |
| DEPRECIATION | 142,057 | 12,012 | 96,097 | 45,960 | 68% | (1,392) |
| STAFF MEMBERSHIP DUES | 525 | - | 525 | - | 100% | (175) |
| MCLE BOARD EXPENSES | 6,000 | - | 1,081 | 4,919 | 18% | 2,919 |
| STAFF TRAVEL/PARKING | 50 | - | - | 50 | 0% | 33 |
| STAFF CONFERENCE & TRAINING | 4,400 | - | - | 4,400 | 0% | 2,933 |
| **TOTAL DIRECT EXPENSES:** | **153,032** | **12,012** | **97,703** | **55,329** | **64%** | **4,318** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.73 FTE) | 407,360 | 29,565 | 288,519 | 118,841 | 71% | (16,945) |
| BENEFITS EXPENSE | 124,032 | 11,048 | 88,329 | 35,703 | 71% | (5,641) |
| OTHER INDIRECT EXPENSE | 162,876 | 7,634 | 94,049 | 68,828 | 58% | 14,536 |
| **TOTAL INDIRECT EXPENSES:** | **694,269** | **48,246** | **470,897** | **223,372** | **68%** | **(8,051)** |
| **TOTAL ALL EXPENSES:** | **847,301** | **60,258** | **568,600** | **278,701** | **67%** | **(3,733)** |
| **NET INCOME (LOSS):** | **490,949** | **49,767** | **492,950** | **(2,001)** | **100%** | **165,651** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

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**67% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **MEMBER SERVICES & ENGAGEMENT TEAM** | | | | | | |
| **(LLB-MINI-MSE-NME)** | | | | | | |
| **REVENUE:** | | | | | | |
| ROYALTIES | 10,800 | - | 7,200 | 3,600 | 67% | - |
| NME PRODUCT SALES | 120,000 | 3,862 | 98,519 | 21,481 | 82% | 18,519 |
| DIGITAL VIDEO SALES | 25,000 | 931 | 23,030 | 1,970 | 92% | 6,363 |
| SPONSORSHIPS | 11,500 | 2,000 | 11,000 | 500 | 96% | 3,333 |
| SEMINAR REGISTRATIONS | 12,000 | 19 | 7,612 | 4,388 | 63% | (388) |
| TRIAL ADVOCACY PROGRAM | 12,000 | 600 | 13,805 | (1,805) | 115% | 5,805 |
| **TOTAL REVENUE:** | **191,300** | **7,412** | **161,166** | **30,134** | **84%** | **33,633** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 3,500 | 41 | 89 | 3,411 | 3% | 2,244 |
| STAFF CONFERENCE & TRAINING | 2,700 | - | (25) | 2,725 | -1% | 1,825 |
| SMALL TOWN AND RURAL COMMITTEE | 7,500 | - | - | 7,500 | 0% | 5,000 |
| PRINTING & COPYING | 1,600 | - | 1,502 | 98 | 94% | (436) |
| DISABILITY ACCOMMODATIONS | 2,000 | - | - | 2,000 | 0% | 1,333 |
| HONORARIUM | 1,500 | - | - | 1,500 | 0% | 1,000 |
| SUBSCRIPTIONS | 400 | 398 | 398 | 2 | 99% | (131) |
| NEW MEMBER LIAISON SECTION PROGRAM | 1,300 | - | 565 | 735 | 43% | 302 |
| SMALL TOWN AND RURAL COMMITTEE OUTREACH AND ACTIVITIES | 70,000 | 45,000 | 51,000 | 19,000 | 73% | (4,333) |
| ON24 OVERAGE CHARGE | 4,500 | - | 4,422 | 78 | 98% | (1,422) |
| MEMBER ENGAGEMENT COUNCIL | 500 | - | - | 500 | 0% | 333 |
| NEW MEMBER OUTREACH EVENTS | 5,000 | - | 1,973 | 3,027 | 39% | 1,361 |
| SPEAKERS & PROGRAM DEVELOP | 100 | - | - | 100 | 0% | 67 |
| WASHINGTON NEW MEMBERS COMMITTEE | 15,000 | 701 | 9,282 | 5,718 | 62% | 718 |
| TRIAL ADVOCACY EXPENSES | 3,200 | 622 | 2,473 | 727 | 77% | (340) |
| LAW LIBRARY DESKBOOK ACCESS | 10,000 | - | - | 10,000 | 0% | 6,667 |
| LAW SCHOOL OUTREACH | 500 | - | 66 | 434 | 13% | 268 |
| RECEPTION/FORUM EXPENSE | 1,000 | - | 17 | 983 | 2% | 649 |
| STAFF MEMBERSHIP DUES | 1,020 | 195 | 195 | 825 | 19% | 485 |
| LIBRARY MATERIALS/RESOURCES | 4,000 | 25 | 335 | 3,665 | 8% | 2,331 |
| SPEAKERS & PROGRAM DEVELOPMENT | 500 | - | - | 500 | 0% | 333 |
| AWARDS | 1,000 | - | 72 | 928 | 7% | 595 |
| **TOTAL DIRECT EXPENSES:** | **136,820** | **46,981** | **72,365** | **64,455** | **53%** | **18,849** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.73 FTE) | 341,638 | 30,363 | 236,996 | 104,642 | 69% | (9,237) |
| BENEFITS EXPENSE | 117,073 | 10,618 | 82,954 | 34,119 | 71% | (4,905) |
| OTHER INDIRECT EXPENSE | 162,876 | 7,634 | 94,049 | 68,828 | 58% | 14,536 |
| **TOTAL INDIRECT EXPENSES:** | **621,588** | **48,615** | **413,999** | **207,589** | **67%** | **393** |
| **TOTAL ALL EXPENSES:** | **758,408** | **95,596** | **486,363** | **272,044** | **64%** | **19,242** |
| **NET INCOME (LOSS):** | **(567,108)** | **(88,184)** | **(325,197)** | **(241,910)** | **57%** | **52,874** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 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 | 1,668 | 1,668 | 18,332 | 8% | 11,665 |
| WASHINGTON LEADERSHIP INSTITUTE | 100,000 | - | 100,000 | - | 100% | (33,333) |
| ED TRAVEL & OUTREACH | 6,000 | 358 | 3,434 | 2,566 | 57% | 566 |
| STAFF TRAVEL/PARKING | 2,000 | 198 | 1,584 | 416 | 79% | (251) |
| STAFF CONFERENCE & TRAINING | 13,300 | 442 | 9,826 | 3,474 | 74% | (959) |
| STAFF MEMBERSHIP DUES | 1,335 | 175 | 1,120 | 215 | 84% | (230) |
| **TOTAL DIRECT EXPENSES:** | **142,635** | **2,841** | **117,632** | **25,003** | **82%** | **(22,542)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.23 FTE) | 643,856 | 54,011 | 437,657 | 206,199 | 68% | (8,419) |
| BENEFITS EXPENSE | 142,505 | 13,337 | 104,638 | 37,867 | 73% | (9,635) |
| OTHER INDIRECT EXPENSE | 145,659 | 6,832 | 84,181 | 61,478 | 58% | 12,925 |
| **TOTAL INDIRECT EXPENSES:** | **932,020** | **74,180** | **626,476** | **305,544** | **67%** | **(5,129)** |
| **TOTAL ALL EXPENSES:** | **1,074,655** | **77,021** | **744,109** | **330,546** | **69%** | **(27,672)** |
| **NET INCOME (LOSS):** | **(1,074,655)** | **(77,021)** | **(744,109)** | **(330,546)** | **69%** | **(27,672)** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## OFFICE OF GENERAL COUNSEL

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| RECOVERY OF DISCIPLINE COSTS | - | - | 1,000 | (1,000) | | 1,000 |
| **TOTAL REVENUE:** | **-** | **-** | **1,000** | **(1,000)** | | **-** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 3,500 | 1,011 | 2,625 | 875 | 75% | (291) |
| STAFF MEMBERSHIP DUES | 2,500 | - | 2,004 | 497 | 80% | (337) |
| COURT RULES COMMITTEE | 1,000 | - | - | 1,000 | 0% | 667 |
| CUSTODIANSHIPS | 5,000 | - | 301 | 4,699 | 6% | 3,032 |
| WILLS | 1,000 | - | - | 1,000 | 0% | 667 |
| LITIGATION EXPENSES | 1,000 | - | - | 1,000 | 0% | 667 |
| DISABILITY ACCOMMODATIONS | 2,500 | 53 | 495 | 2,005 | 20% | 1,172 |
| STAFF CONFERENCE & TRAINING | 10,250 | 1,199 | 4,096 | 6,154 | 40% | 2,737 |
| **TOTAL DIRECT EXPENSES:** | **26,750** | **2,263** | **9,520** | **17,230** | **36%** | **8,314** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (6.12 FTE) | 718,300 | 56,995 | 456,834 | 261,465 | 64% | 22,032 |
| BENEFITS EXPENSE | 187,732 | 16,392 | 128,356 | 59,376 | 68% | (3,201) |
| OTHER INDIRECT EXPENSE | 210,741 | 9,891 | 121,881 | 88,860 | 58% | 18,613 |
| **TOTAL INDIRECT EXPENSES:** | **1,116,772** | **83,278** | **707,071** | **409,701** | **63%** | **37,444** |
| **TOTAL ALL EXPENSES:** | **1,143,522** | **85,541** | **716,591** | **426,932** | **63%** | **45,758** |
| **NET INCOME (LOSS):** | **(1,143,522)** | **(85,541)** | **(715,591)** | **(427,932)** | **63%** | **46,758** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSE:** | | | | | | |
| STAFF MEMBERSHIP DUES | 100 | - | - | 100 | 0% | 67 |
| DISCIPLINARY BOARD EXPENSES | 3,000 | 127 | 127 | 2,873 | 4% | 1,873 |
| CHIEF HEARING OFFICER | 41,200 | 3,333 | 26,664 | 14,536 | 65% | 803 |
| COURT REPORTERS | 33,100 | 10,282 | 37,310 | (4,210) | 113% | (15,243) |
| HEARING OFFICER EXPENSES | 4,000 | 199 | 348 | 3,652 | 9% | 2,319 |
| HEARING OFFICER TRAINING | 1,000 | 398 | 1,298 | (298) | 130% | (631) |
| APPOINTED COUNSEL | 50,645 | 4,235 | 33,740 | 16,905 | 67% | 23 |
| DISCIPLINARY SELECTION PANEL | 1,000 | - | - | 1,000 | 0% | 667 |
| STAFF CONFERENCE & TRAINING | 2,200 | - | - | 2,200 | 0% | 1,467 |
| **TOTAL DIRECT EXPENSES:** | **136,245** | **18,573** | **99,486** | **36,759** | **73%** | **(8,656)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.30 FTE) | 128,774 | 11,146 | 89,730 | 39,044 | 70% | (3,881) |
| BENEFITS EXPENSE | 37,003 | 3,354 | 26,302 | 10,702 | 71% | (1,633) |
| OTHER INDIRECT EXPENSE | 44,765 | 2,103 | 25,909 | 18,856 | 58% | 3,934 |
| **TOTAL INDIRECT EXPENSES:** | **210,543** | **16,603** | **141,941** | **68,602** | **67%** | **(1,579)** |
| **TOTAL ALL EXPENSES:** | **346,788** | **35,177** | **241,427** | **105,361** | **70%** | **(10,235)** |
| **NET INCOME (LOSS):** | **(346,788)** | **(35,177)** | **(241,427)** | **(105,361)** | **70%** | **(10,235)** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 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 | 232 | 1,265 | 14,735 | 8% | 9,402 |
| STAFF TRAVEL/PARKING | 200 | 196 | 196 | 4 | 98% | (63) |
| **TOTAL DIRECT EXPENSES:** | **16,200** | **428** | **1,461** | **14,739** | **9%** | **9,339** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.55 FTE) ** | 63,145 | 4,045 | 41,451 | 21,694 | 66% | 646 |
| BENEFITS EXPENSE | 16,771 | 1,424 | 11,651 | 5,120 | 69% | (471) |
| OTHER INDIRECT EXPENSE | 18,939 | 892 | 10,984 | 7,955 | 58% | 1,642 |
| **TOTAL INDIRECT EXPENSES:** | **98,855** | **6,360** | **64,086** | **34,769** | **65%** | **1,817** |
| **TOTAL ALL EXPENSES:** | **115,055** | **6,788** | **65,547** | **49,508** | **57%** | **11,156** |
| **NET INCOME (LOSS):** | **(115,055)** | **(6,788)** | **(65,547)** | **(49,508)** | **57%** | **11,156** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **PUBLIC SERVICE PROGRAMS** | | | | | | |
| **REVENUE:** | | | | | | |
| DONATIONS & GRANTS | 132,635 | - | 132,639 | (4) | 100% | 44,216 |
| **TOTAL REVENUE:** | **132,635** | **-** | **132,639** | **(4)** | **100%** | **44,216** |
| **DIRECT EXPENSES:** | | | | | | |
| DONATIONS/SPONSORSHIPS/GRANTS | - | - | (5,178) | 5,178 | | 5,178 |
| STAFF TRAVEL/PARKING | 2,000 | - | 66 | 1,934 | 3% | 1,268 |
| PRO BONO & PUBLIC SERVICE COMMITTEE | 3,500 | 90 | 2,509 | 991 | 72% | (175) |
| STAFF CONFERENCE & TRAINING | 3,200 | - | 669 | 2,531 | 21% | 1,464 |
| PRO BONO OUTREACH | 4,000 | - | - | 4,000 | 0% | 2,667 |
| **TOTAL DIRECT EXPENSES:** | **12,700** | **90** | **(1,934)** | **14,634** | **-15%** | **10,401** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.10 FTE) ** | 187,614 | 15,475 | 113,600 | 74,014 | 61% | 11,476 |
| BENEFITS EXPENSE | 50,197 | 5,032 | 36,749 | 13,449 | 73% | (3,284) |
| OTHER INDIRECT EXPENSE | 72,313 | 3,382 | 38,770 | 33,543 | 54% | 9,439 |
| **TOTAL INDIRECT EXPENSES:** | **310,124** | **23,889** | **189,118** | **121,006** | **61%** | **17,631** |
| **TOTAL ALL EXPENSES:** | **322,824** | **23,979** | **187,184** | **135,640** | **58%** | **28,032** |
| **NET INCOME (LOSS):** | **(190,189)** | **(23,979)** | **(54,545)** | **(135,644)** | **29%** | **72,248** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## PUBLICATION & DESIGN SERVICES

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| SUBSCRIPTIONS | 200 | - | - | 200 | 0% | 133 |
| IMAGE LIBRARY | 4,800 | - | 4,756 | 44 | 99% | (1,556) |
| **TOTAL DIRECT EXPENSES:** | **5,000** | **-** | **4,756** | **244** | **95%** | **(1,423)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.89 FTE) | 70,644 | 5,878 | 47,857 | 22,786 | 68% | (762) |
| BENEFITS EXPENSE | 22,914 | 2,055 | 16,193 | 6,721 | 71% | (917) |
| OTHER INDIRECT EXPENSE | 30,647 | 1,441 | 17,749 | 12,898 | 58% | 2,682 |
| **TOTAL INDIRECT EXPENSES:** | **124,205** | **9,374** | **81,799** | **42,406** | **66%** | **1,004** |
| **TOTAL ALL EXPENSES:** | **129,205** | **9,374** | **86,555** | **42,650** | **67%** | **(419)** |
| **NET INCOME (LOSS):** | **(129,205)** | **(9,374)** | **(86,555)** | **(42,650)** | **67%** | **(419)** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## REGULATORY SERVICES FTE

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF MEMBERSHIP DUES | 490 | - | 490 | - | 100% | (163) |
| STAFF CONFERENCE & TRAINING | 11,500 | - | 734 | 10,766 | 6% | 6,932 |
| STAFF TRAVEL/PARKING | 600 | 18 | 180 | 420 | 30% | 220 |
| **TOTAL DIRECT EXPENSES:** | **12,590** | **18** | **1,404** | **11,186** | **11%** | **7,152** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.00 FTE) ** | 288,255 | 22,536 | 186,018 | 102,237 | 65% | 6,152 |
| BENEFITS EXPENSE | 68,347 | 5,926 | 46,790 | 21,557 | 68% | (1,226) |
| OTHER INDIRECT EXPENSE | 68,870 | 3,225 | 39,718 | 29,152 | 58% | 6,195 |
| **TOTAL INDIRECT EXPENSES:** | **425,472** | **31,686** | **272,526** | **152,946** | **64%** | **11,122** |
| **TOTAL ALL EXPENSES:** | **438,062** | **31,704** | **273,930** | **164,131** | **63%** | **18,274** |
| **NET INCOME (LOSS):** | **(438,062)** | **(31,704)** | **(273,930)** | **(164,131)** | **63%** | **18,111** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## REGULATORY REFORM

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| CONSULTING SERVICES | 25,000 | - | 8,828 | 16,172 | 35% | 7,839 |
| OUTREACH EXPENSES | 10,000 | - | - | 10,000 | 0% | 6,667 |
| MEETING EXPENSE | 2,000 | - | - | 2,000 | 0% | 1,333 |
| SOFTWARE HOSTING | 20,000 | - | - | 20,000 | 0% | 13,333 |
| **TOTAL DIRECT EXPENSES:** | **57,000** | **-** | **8,828** | **48,172** | **15%** | **-** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.85 FTE) ** | 110,346 | 9,439 | 76,413 | 33,933 | 69% | (2,849) |
| BENEFITS EXPENSE | 27,639 | 2,492 | 19,390 | 8,249 | 70% | (964) |
| OTHER INDIRECT EXPENSE | 29,270 | 1,369 | 16,879 | 12,390 | 58% | 2,634 |
| **TOTAL INDIRECT EXPENSES:** | **167,255** | **13,301** | **112,682** | **54,572** | **67%** | **(1,179)** |
| **TOTAL ALL EXPENSES:** | **224,255** | **13,301** | **121,510** | **102,744** | **54%** | **(1,179)** |
| **NET INCOME (LOSS):** | **(224,255)** | **(13,301)** | **(121,510)** | **(102,744)** | **54%** | **27,993** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 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 | 2,063 | 393,947 | (118,947) | 143% | 210,613 |
| **TOTAL REVENUE:** | **275,000** | **2,063** | **393,947** | **(118,947)** | **143%** | **210,613** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 1,900 | - | 336 | 1,564 | 18% | 931 |
| SECTION/COMMITTEE CHAIR MTGS | 500 | - | 148 | 352 | 30% | 186 |
| **TOTAL DIRECT EXPENSES:** | **2,400** | **-** | **484** | **1,916** | **20%** | **1,116** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.53 FTE) | 174,309 | 15,289 | 119,597 | 54,712 | 69% | (3,391) |
| BENEFITS EXPENSE | 61,514 | 5,580 | 43,436 | 18,079 | 71% | (2,426) |
| OTHER INDIRECT EXPENSE | 87,120 | 4,090 | 50,391 | 36,729 | 58% | 7,689 |
| **TOTAL INDIRECT EXPENSES:** | **322,943** | **24,958** | **213,423** | **109,520** | **66%** | **1,872** |
| **TOTAL ALL EXPENSES:** | **325,343** | **24,958** | **213,907** | **111,436** | **66%** | **2,988** |
| **NET INCOME (LOSS):** | **(50,343)** | **(22,896)** | **180,040** | **(230,383)** | **-358%** | **213,602** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **SECTIONS OPERATIONS** | | | | | | |
| **REVENUE:** | | | | | | |
| SECTION DUES | 451,143 | 3,339 | 634,963 | (183,820) | 141% | 334,201 |
| SEMINAR PROFIT SHARE | 157,850 | - | 1,498 | 156,352 | 1% | (103,735) |
| PUBLICATIONS REVENUE | 1,250 | - | 322 | 928 | 26% | (511) |
| OTHER | 43,073 | 1,785 | 31,290 | 11,783 | 73% | 2,575 |
| **TOTAL REVENUE:** | **653,316** | **5,124** | **668,073** | **(14,757)** | **102%** | **232,529** |
| **DIRECT EXPENSES:** | | | | | | |
| DIRECT EXPENSES OF SECTION ACTIVITIES | 810,582 | 98,846 | 260,164 | 550,418 | 32% | 280,224 |
| REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES | 280,540 | 2,063 | 393,947 | (113,407) | 140% | (206,920) |
| **TOTAL DIRECT EXPENSES:** | **1,091,122** | **100,909** | **654,110** | **437,011** | **60%** | **73,304** |
| **NET INCOME (LOSS):** | **(437,806)** | **(95,785)** | **13,963** | **(451,768)** | **-3%** | **305,833** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## TECHNOLOGY

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| CONSULTING SERVICES | 1,019,797 | 53,839 | 465,443 | 554,354 | 46% | 214,421 |
| STAFF TRAVEL/PARKING | 1,000 | 13 | 301 | 699 | 30% | 366 |
| STAFF MEMBERSHIP DUES | 410 | - | - | 410 | 0% | 273 |
| TELEPHONE | 90,000 | 6,808 | 60,676 | 29,324 | 67% | (676) |
| COMPUTER HARDWARE | 65,000 | 884 | 44,309 | 20,691 | 68% | (975) |
| COMPUTER SOFTWARE | 518,000 | 489 | 294,036 | 223,964 | 57% | 51,297 |
| HARDWARE SERVICE & WARRANTIES | 50,000 | 1,967 | 16,380 | 33,620 | 33% | 16,953 |
| SOFTWARE MAINTENANCE & LICENSING | 470,000 | 819 | 414,733 | 55,267 | 88% | (101,400) |
| THIRD PARTY SERVICES | 177,600 | 866 | 114,397 | 63,203 | 64% | 4,003 |
| CLOUD INFRASTRUCTURE | 130,000 | 5,486 | 36,643 | 93,357 | 28% | 50,024 |
| STAFF CONFERENCE & TRAINING | 6,000 | - | - | 6,000 | 0% | 4,000 |
| TRANSFER TO INDIRECT EXPENSES | (2,527,807) | (71,172) | (1,446,918) | (1,080,889) | 57% | (238,286) |
| **TOTAL DIRECT EXPENSES:** | - | - | - | - | | - |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (5.00 FTE) | 629,276 | 71,227 | 497,486 | 131,790 | 79% | (77,968) |
| BENEFITS EXPENSE | 158,341 | 16,518 | 121,707 | 36,634 | 77% | (16,146) |
| CAPITAL LABOR & OVERHEAD | - | - | (23,920) | 23,920 | | (23,920) |
| OTHER INDIRECT EXPENSE | 172,174 | 8,067 | 99,385 | 72,788 | 58% | 15,397 |
| **TOTAL INDIRECT EXPENSES:** | **959,791** | **95,812** | **694,659** | **265,132** | **72%** | **(102,637)** |
| **TOTAL ALL EXPENSES:** | **959,791** | **95,812** | **694,659** | **265,132** | **72%** | **(102,637)** |
| **NET INCOME (LOSS):** | **(959,791)** | **(95,812)** | **(694,659)** | **(265,132)** | **72%** | **(54,798)** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

## VOLUNTEER ENGAGEMENT

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| POSTAGE | 600 | - | - | 600 | 0% | 400 |
| STAFF MEMBERSHIP DUES | 385 | - | 424 | (39) | 110% | (167) |
| STAFF CONFERENCE & TRAINING | 4,500 | - | 1,653 | 2,847 | 37% | 1,347 |
| SUBSCRIPTIONS | 816 | - | 744 | 72 | 91% | (200) |
| VOLUNTEER RECOGNITION | 2,000 | - | 660 | 1,340 | 33% | 673 |
| REGULATORY SCHOOL | 10,000 | - | 5,310 | 4,690 | 53% | 1,357 |
| ABA DELEGATES | 18,000 | - | 6,876 | 11,124 | 38% | 5,124 |
| **TOTAL DIRECT EXPENSES:** | **36,301** | **-** | **15,668** | **20,633** | **43%** | **8,533** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.70 FTE) | 149,220 | 12,463 | 99,445 | 49,775 | 67% | 35 |
| BENEFITS EXPENSE | 45,777 | 4,072 | 32,158 | 13,619 | 70% | (1,640) |
| OTHER INDIRECT EXPENSE | 58,539 | 2,739 | 33,759 | 24,781 | 58% | 5,267 |
| **TOTAL INDIRECT EXPENSES:** | **253,536** | **19,274** | **165,362** | **88,174** | **65%** | **3,662** |
| **TOTAL ALL EXPENSES:** | **289,837** | **19,274** | **181,030** | **108,807** | **62%** | **3,662** |
| **NET INCOME (LOSS):** | **(289,837)** | **(19,274)** | **(181,030)** | **(108,807)** | **62%** | **12,195** |

## Washington State Bar Association

Statement of Activities
For the Period from May 01, 2026 to May 31, 2026
**67% OF YEAR COMPLETE**

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **INDIRECT EXPENSES:** | | | | | | |
| SALARIES | 14,130,725 | 1,178,748 | 9,455,559 | 4,675,166 | 67% | (35,075) |
| TEMPORARY SALARIES | 212,850 | 15,231 | 121,909 | 90,941 | 57% | 19,991 |
| CAPITAL LABOR & OVERHEAD | - | - | (23,920) | 23,920 | | 23,920 |
| ALLOWANCE FOR OPEN POSITIONS | (200,000) | - | - | (200,000) | 0% | (133,333) |
| EMPLOYEE ASSISTANCE PLAN | 4,800 | - | 2,400 | 2,400 | 50% | 800 |
| EMPLOYEE SERVICE AWARDS | 2,260 | 200 | 698 | 1,562 | 31% | 809 |
| FICA (EMPLOYER PORTION) | 1,067,890 | 88,286 | 699,342 | 368,548 | 65% | 12,584 |
| L&I INSURANCE | 65,406 | - | 29,051 | 36,355 | 44% | 14,553 |
| WA STATE FAMILY MEDICAL LEAVE (EMPLOYER PO | 38,961 | 3,798 | 27,991 | 10,970 | 72% | (2,017) |
| MEDICAL (EMPLOYER PORTION) | 1,959,293 | 194,774 | 1,472,741 | 486,552 | 75% | (166,545) |
| RETIREMENT (EMPLOYER PORTION) | 778,534 | 64,027 | 517,861 | 260,673 | 67% | 1,161 |
| TRANSPORTATION ALLOWANCE | 25,944 | 252 | 26,713 | (769) | 103% | (9,417) |
| UNEMPLOYMENT INSURANCE | 73,419 | 8,959 | 55,605 | 17,814 | 76% | (6,659) |
| **TOTAL SALARY & BENEFITS EXPENSE:** | **18,160,082** | **1,554,274** | **12,385,951** | **5,774,131** | **68%** | **(279,229)** |
| WORKPLACE BENEFITS | 60,150 | 2,469 | 15,583 | 44,567 | 26% | 24,517 |
| HUMAN RESOURCES POOLED EXP | 115,700 | 4,354 | 56,181 | 59,519 | 49% | 20,952 |
| MEETING SUPPORT EXPENSES | 9,950 | 1,945 | 6,128 | 3,822 | 62% | 505 |
| RENT | 923,055 | 72,565 | 641,560 | 281,495 | 70% | (26,190) |
| PERSONAL PROP TAXES-WSBA | 6,500 | 514 | 4,428 | 2,072 | 68% | (94) |
| FURNITURE, MAINT, LH IMP | 48,450 | 1,157 | 20,003 | 28,447 | 41% | 12,297 |
| SAFETY & SECURITY | 10,420 | 371 | 1,424 | 8,996 | 14% | 5,522 |
| OFFICE SUPPLIES & EQUIPMENT | 19,635 | 1,822 | 10,449 | 9,186 | 53% | 2,641 |
| FURN, LH IMP, & OFFICE EQUIP DEPRECIATION | 224,084 | 18,570 | 148,621 | 75,463 | 66% | 768 |
| COMPUTER HARDWARE DEPRECIATION | 47,971 | 4,792 | 35,120 | 12,851 | 73% | (3,139) |
| COMPUTER SOFTWARE DEPRECIATION | 36,319 | 2,606 | 26,401 | 9,918 | 73% | (2,188) |
| INSURANCE | 273,491 | 22,171 | 177,369 | 96,122 | 65% | 4,958 |
| WORK HOME FURNITURE & EQUIP | 10,500 | 661 | 2,462 | 8,038 | 23% | 4,538 |
| PROFESSIONAL FEES-AUDIT | 43,500 | - | 41,695 | 1,805 | 96% | (12,695) |
| PROFESSIONAL FEES-LEGAL | 250,000 | - | 37,969 | 212,031 | 15% | 128,697 |
| ONLINE LEGAL RESEARCH | 89,000 | 12,432 | 58,246 | 30,754 | 65% | 1,087 |
| ACCOMODATIONS FUND | 6,500 | - | - | 6,500 | 0% | 4,333 |
| TRANSLATION SERVICES | 25,000 | 3,084 | 10,232 | 14,768 | 41% | 6,434 |
| TELEPHONE & INTERNET | 33,600 | 2,670 | 21,530 | 12,070 | 64% | 870 |
| POSTAGE - GENERAL | 12,000 | 562 | 5,384 | 6,616 | 45% | 2,616 |
| RECORDS MANAGEMENT | 7,500 | - | - | 7,500 | 0% | 5,000 |
| BANK FEES | 27,000 | 1,475 | 18,186 | 8,814 | 67% | (186) |
| PRODUCTION MAINTENANCE & SUPPLIES | 13,250 | - | 6,580 | 6,670 | 50% | 2,254 |
| COMPUTER POOLED EXPENSES | 2,527,807 | 71,103 | 1,446,412 | 1,081,395 | 57% | 238,792 |
| **TOTAL OTHER INDIRECT EXPENSES:** | **4,821,383** | **225,325** | **2,791,966** | **2,029,417** | **58%** | **422,290** |
| **TOTAL INDIRECT EXPENSES:** | **22,981,465** | **1,779,600** | **15,177,916** | **7,803,549** | **66%** | **143,060** |

# Washington State Bar Association

Statement of Activities

For the Period from May 01, 2026 to May 31, 2026

**67% OF YEAR COMPLETE**

| SUMMARY PAGE | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE |
|---|---|---|---|---|
| ACCESS TO JUSTICE | (369,448) | (28,061) | (198,973) | (170,475) |
| ADMISSIONS/BAR EXAM | (70,382) | 42,223 | 696,238 | (766,621) |
| ADVANCEMENT FTE | (322,209) | (25,211) | (210,363) | (111,846) |
| BAR NEWS | (184,871) | (14,579) | (83,411) | (101,460) |
| BENCH BAR PRESS | - | 600 | (175) | 175 |
| BOARD OF GOVERNORS | (656,550) | (65,086) | (387,956) | (268,594) |
| CONFERENCE & BROADCAST SERVICES | (83,138) | (6,327) | (55,059) | (28,078) |
| CHARACTER & FITNESS BOARD | (183,031) | (12,428) | (117,572) | (65,459) |
| CLE - PRODUCTS | 651,708 | 5,233 | 458,460 | 193,248 |
| CLE - SEMINARS | (521,923) | 29,135 | (355,008) | (166,915) |
| CLIENT PROTECTION FUND | 244,100 | (11,571) | 699,264 | (455,164) |
| COMMUNICATIONS | (927,116) | (111,874) | (597,304) | (329,811) |
| COMMUNICATIONS FTE | (257,458) | (20,409) | (172,988) | (84,470) |
| DESKBOOKS | (261,267) | 3,402 | (174,278) | (86,989) |
| DISCIPLINE | (6,714,684) | (504,280) | (4,306,397) | (2,408,288) |
| DIVERSITY | (266,146) | (26,914) | (87,098) | (179,048) |
| ENTITY REGULATION | (67,555) | (4,621) | (59,926) | (7,629) |
| FACILITIES & OPERATIONS | (749,267) | (58,581) | (509,536) | (239,731) |
| FINANCE | (630,173) | (7,424) | (315,158) | (315,015) |
| FOUNDATION | (194,625) | (14,842) | (123,594) | (71,032) |
| HUMAN RESOURCES | (540,066) | (48,407) | (445,307) | (94,759) |
| LAW CLERK PROGRAM | (20,825) | (15,137) | 107,532 | (128,357) |
| LEGISLATIVE | (295,591) | (13,616) | (177,466) | (118,125) |
| LEGAL LUNCHBOX | (34,025) | (3,636) | (11,842) | (22,183) |
| LICENSE FEES | 17,652,266 | 1,495,314 | 11,967,761 | 5,684,505 |
| LICENSING AND MEMBERSHIP | (336,145) | 2,725 | (113,404) | (222,741) |
| LIMITED LICENSE LEGAL TECHNICIAN | (61,045) | (3,008) | (34,019) | (27,026) |
| LIMITED PRACTICE OFFICERS | 56,640 | 7,276 | 53,005 | 3,635 |
| MANDATORY CLE ADMINISTRATION | 490,949 | 49,767 | 492,950 | (2,001) |
| MEMBER WELLNESS PROGRAM | (247,030) | (19,179) | (163,722) | (83,308) |
| MINI CLE | (134,341) | (10,258) | (88,211) | (46,130) |
| MEMBER SERVICES & ENGAGEMENT | (418,764) | (69,121) | (264,661) | (154,102) |
| NEW MEMBER EDUCATION | 20,022 | (5,169) | 39,516 | (19,495) |
| OFFICE OF GENERAL COUNSEL | (1,143,522) | (85,541) | (715,591) | (427,932) |
| OFFICE OF THE EXECUTIVE DIRECTOR | (1,074,655) | (77,021) | (744,109) | (330,546) |
| OGC-DISCIPLINARY BOARD | (346,788) | (35,177) | (241,427) | (105,361) |
| PRACTICE OF LAW BOARD | (115,055) | (6,788) | (65,547) | (49,508) |
| PRACTICE MANAGEMENT ASSISTANCE | (186,220) | 17,472 | (124,223) | (61,997) |
| PROFESSIONAL RESPONSIBILITY PROGRAM | (224,777) | (17,305) | (143,053) | (81,723) |
| PUBLIC SERVICE PROGRAMS | (190,189) | (23,979) | (54,545) | (135,644) |
| PUBLICATION & DESIGN SERVICES | (129,205) | (9,374) | (86,555) | (42,650) |
| REGULATORY SERVICES FTE | (438,062) | (31,704) | (273,930) | (164,131) |
| REGULATORY REFORM | (224,255) | (13,301) | (121,510) | (102,744) |
| SECTIONS ADMINISTRATION | (50,343) | (22,896) | 180,040 | (230,383) |
| SECTIONS OPERATIONS | (437,806) | (95,785) | 13,963 | (451,768) |
| TECHNOLOGY | (959,791) | (95,812) | (694,659) | (265,132) |
| VOLUNTEER EDUCATION | (289,837) | (19,274) | (181,030) | (108,807) |
| INDIRECT EXPENSES | 22,981,465 | 1,779,600 | 15,177,916 | 7,803,549 |
| **TOTAL OF ALL** | **(21,738,972)** | **(1,799,050)** | **(17,387,040)** | **(4,351,932)** |
| **NET INCOME (LOSS)** | **(1,242,493)** | **19,450** | **2,209,124** | **(3,451,617)** |

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 | PROGRAM CRITERIA |
|---|---|
| **Ensuring Competent and Qualified Legal Professionals**<br>• Cradle to Grave<br>• Regulation and Assistance<br><br>**Promoting the Role of Legal Professionals in Society**<br>• Service<br>• Professionalism | • Does the Program further either or both of WSBA's mission-focus areas?<br>• Does WSBA have the competency to operate the Program?<br>• As the mandatory bar, how is WSBA uniquely positioned to successfully operate the Program?<br>• Is statewide leadership required in order to achieve the mission of the Program?<br>• 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.]*

WASHINGTON STATE
BAR ASSOCIATION

# 2025-2026 WSBA BOARD OF GOVERNORS MEETING SCHEDULE

| MEETING DATE | LOCATION | DESCRIPTION | EXECUTIVE COMMITTEE MEETING | MATERIALS DEADLINE |
|---|---|---|---|---|
| October 24-25, 2025 | Icicle Village Resort<br>Leavenworth, WA | Team Building Retreat | | n/a |
| November 14-15, 2025 | WSBA Conference Center<br>Seattle, WA | BOG Meeting | October 22, 2025 | October 14, 2025 |
| January 16-17, 2026 | WSBA Conference Center<br>Seattle, WA | BOG Meeting<br>KCBA MLK Luncheon Jan. 16 | December 18, 2025 | December 9, 2025 |
| March 6-7, 2026 | Great Wolf Lodge,<br>Grand Mound, WA | BOG Meeting | February 19, 2026 | February 10, 2026 |
| May 1-2, 2026 | Wenatchee Convention Center<br>Wenatchee, WA | BOG Meeting | April 16, 2026 | April 7, 2026 |
| July 23 - 24, 2026<br><br>July 25, 2026 | Tulalip Resort Casino<br>Marysville, WA | BOG Meeting<br><br>BOG Planning Retreat | June 25, 2026 | June 15, 2026 |
| September 24-25, 2026 | Davenport Grand Hotel<br>Spokane, WA | BOG Meeting | September 3, 2026 | August 25, 2026 |

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
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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 spirt and effort to work for the mission of the WSBA. Therefore, I commit myself to operating with the following norms:

- I will treat each person with courtesy and respect, valuing each individual.
- I will strive to be nonjudgmental, open-minded, and receptive to the ideas of others.
- I will assume the good intent of others.
- I will speak in ways that encourage others to speak.
- I will respect others' time, workload, and priorities.
- I will aspire to be honest and open in all communications.
- I will aim for clarity; be complete, yet concise.
- I will practice "active" listening and ask questions if I don't understand.
- I will use the appropriate communication method (face-to-face, email, phone, voicemail) for the message and situation.
- When dealing with material of a sensitive or confidential nature, I will seek and confirm that there is mutual agreement to the ground rules of confidentiality at the outset of the communication.
- I will avoid triangulation and go directly to the person with whom I need to communicate. (If there is a problem, I will go to the source for resolution rather than discussing it with or complaining to others.)
- I will focus on reaching understanding and finding solutions to problems.
- I will be mindful of information that affects, or might be of interest or value to, others, and pass it along; err on the side of over-communication.
- I will maintain a sense of perspective and respectful humor.

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**Anthony David Gipe**
President

phone: 206.386.4721
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**

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