WASHINGTON STATE
BAR ASSOCIATION

## BOARD OF GOVERNORS MEETING

**May 1-2, 2026**

# Meeting Materials

Wenatchee, WA
Zoom and Teleconference

**Board of Governors Meeting**
**Wenatchee Convention Center, Wenatchee, WA**
**May 1-2, 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, May 1st : Meeting ID: 868 8077 6709 Passcode: 762540**
https://wsba.zoom.us/j/86880776709?pwd=6LujVDUPacnDpbMrixBpWhuX81fCBo.1

**Saturday, May 2nd : Meeting ID: 837 7475 3574 Passcode: 158188**
https://wsba.zoom.us/j/83774753574?pwd=bsRCK0n4ljUO6uvQQUTtIkagnuU1gK.1

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

**FRIDAY, MAY 1, 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 bloc*.

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**5:00 PM – RECESS**

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**9:00 AM – CALL TO ORDER**

### SPECIAL REPORT

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☐ **GOVERNOR ROUNDTABLE**

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☐ **MEETING FEEDBACK: ROSE, THORNS & BUD**

**11:30 AM – ADJOURN**

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WASHINGTON STATE
BAR ASSOCIATION

# BOARD OF GOVERNORS MEETING MINUTES

## Olympia, WA

## March 6, 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 President Francis Adewale on Friday March 6, at 2:00 p.m. Governors in attendance were:

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

Officers and Executive Staff in attendance were President Francis Adewale, Immediate-Past President Sunitha Anjilvel, 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, and HR Director & Chief Culture Officer Glynnis Klinefelter Sio.

Also in attendance were Andrew Yi, Nancy Hawkins, Sanjay Walveker, Julianne Unite, Jennifer Olegario, Erin Varriano, Catherine Schur, Betsylew Miale-Gix, Brian Anderson, Paris Eriksen, Kyle Sciuchetti, and Patrick Palace.

Member & Public Comments

President Adewale opened the session for member and public comments. No public comments were made.

Consent Calendar

President Adewale presented the consent calendar. There being no requests for removal or objections, the items on the consent calendar were adopted by unanimous consent.

President's Report

President Adewale announced open positions on the Board of Governors, encouraging members to apply for roles in various districts and as president-elect. President Adewale also noted the upcoming joint column with Executive Director Nevitt in the Bar News.

Executive Director's Report

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

Court Rules and Procedures Committee Proposed Comments

Chair Andrew Yi of the Court Rules and Procedures Committee presented proposed comments on several court rules. The committee recommended revisions to Criminal Rule 4.2 to clarify fines related to trafficking offenses and suggested consistent terminology in Criminal Rule 4.7. The committee also proposed changes to the rules for courts of limited jurisdiction to streamline the process for defense counsel providing redacted discovery. Gov. Kevin Fay moved to approve the proposed comments. The motion passed with three negative votes.

Approve Appointment of Foundation Trustee

Chair Brian Anderson proposed the appointment of Kriti Ganguly to the Washington State Bar Foundation's Board of Trustees. Gov. Kari Petrasek moved to approve Kriti Ganguly as the newest member of the Washington State Bar Foundation Board of Trustees. The motion passed unanimously.

Third Read: Governance Committee's Proposed Amendments to the WSBA Bylaws re Political Activities,

Chair Kevin Fay presented the third reading of the proposed bylaw amendments concerning the political activities of governors and officers. The proposal incorporated feedback from the previous meeting. Gov. Parvin Price moved to approve the bylaw amendments. The motion passed unanimously.

Update on Experiential Licensing Pathway

Gov. Jordan Couch provided an update on the experiential licensing pathways, set for implementation in July 2027 as an alternative to the bar exam. The discussion focused on the development of nine core competencies required for licensure, including legal processes, professional conduct, and client interaction. The Licensure Pathways Steering Committee is considering a uniform supervision requirement of 825 hours across all pathways, replacing the previous three-tiered model. Concerns were raised regarding public perception and the non-retroactive application of the new rules for current law clerks. Feedback from listening sessions indicated general support for the new pathway. The Steering Committee will continue to refine the proposal and engage with stakeholders to ensure effective implementation.

Governor Roundtable

The Member Engagement Council, co-chaired by Govs. Rathbone and Matthew Dresden announced the initiation of a viability review for the Animal Law Section. Discussion ensued about the necessity and structure of the viability review process, with suggestions to potentially modify or eliminate it. Gov. Fay suggested that the Governance Committee evaluate the viability review's effectiveness.

Gov. Tom Ahearne proposed enhancing legal education in schools through partnerships with mock trial programs to promote the rule of law.

Chief Regulatory Counsel Garcia shared a member request to make changes to the emeritus status for retired bar members.

Proposal to Sign the NCBP Pledge to Preserve the Independence of the Legal Profession and the Judicial System and to Sponsor a Related ABA Resolution

National Conference of Bar Presidents (NCBP) President Patrick Palace presented a proposal for the WSBA to sign the NCBP pledge, which emphasizes core elements of the Oath of Attorney such as upholding the rule of law and ensuring access to justice. The proposal also included sponsoring a related ABA resolution. Discussion ensued regarding the implications of signing the pledge, including concerns about redundancy and member reaction to such statements. Executive Director Nevitt suggested that if the Board were inclined to approve signing the pledge, it be signed on behalf of the Board of Governors instead of WSBA. Gov. Couch moved to sign the NCBP pledge as the Board of Governors. The motion passed with one negative vote.

Gov. Couch moved to sponsor the ABA resolution as drafted. The motion resulted in a tie vote. President Adewale cast the tie-breaking vote in favor of sponsoring the resolution. The Board agreed to sponsor the ABA resolution with the understanding that sponsorship could be withdrawn if necessary. The Executive Committee will monitor the process and call a special meeting if needed.

Executive Session

The Board entered executive session at 4:25 p.m. to discuss legal advice regarding the Keller deduction. The session concluded at 5:07 p.m., and the Board returned to public session.

Meeting Feedback

Governors identified positive aspects of the meeting, including improved efficiency in discussions. New ideas discussed included a focus on rule of law and mock trial initiatives for high school students.

**ADJOURNMENT**

There being no further business, President Adewale adjourned the meeting at 5:12 p.m. on March 6, 2026.

Respectfully

_____

Terra Nevitt

WSBA Executive Director & Secretary

## Board of Governors Meeting – Motions List
## Olympia, WA
## March 6, 2026

1. **Approve the Consent Calendar:** Adopted by unanimous consent.
2. **Approve Court Rules and Procedures Committee Proposed Comments:** Passed with three negative votes.
3. **Approve New Appointment to the Washington State Bar Foundation Board of Trustees:** Passed unanimously.
4. **Approve Third Read: Proposed Amendments to the WSBA Bylaws Re Political Activities:** Passed unanimously.
5. **Sign the NCBP Pledge as the Board of Governors:** Passed with one negative vote.
6. **Sponsor the ABA Resolution as Drafted:** Passed by tie-breaking vote of the President.

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WASHINGTON STATE
BAR ASSOCIATION

# BOARD OF GOVERNORS SPECIAL MEETING MINUTES

## Virtual

## April 1, 2026

Call to Order and Welcome

The special meeting of the Board of Governors of the Washington State Bar Association (WSBA) was called to order by President Francis Adewale on Wednesday, April 1, 2026, at 3:30 p.m. This special meeting convened to address potential action with respect to (1) a proposed rule by the United States Department of Justice regarding the review of state bar complaints and allegations against DOJ attorneys and (2) Amendments to the Servicemembers Civil Relief Act. Governors in attendance were:

Tom Ahearne
Emily Arneson
Christopher Bhang
Todd Bloom
Matthew Dresden
Kevin Fay
Kristina Larry
Nam Nguyen
Kari Petrasek
Parvin Price
Allison Widney
Alain Villenueve

Officers and Executive Staff in attendance were President Francis Adewale, Immediate-Past President Sunitha Anjilvel, Executive Director Terra Nevitt, Chief Disciplinary Counsel and Parliamentarian Doug Ende, Chief, Chief Regulatory Counsel Renata Garcia, Advancement Department Director Kevin Plachy, General Counsel Laurie Powers, and HR Director & Chief Culture Officer Glynnis Klinefelter Sio.

Also in attendance were Aziza Ozgoren, Rex Nolte, Luke Garrett, David Montes, Amanda Pollard, Randy Winn, Kelly Schmidt, Mary Sakaguchi, M. Long, Anne Watanabe, Julianne Unite, and Carolyn MacGregor.

Member & Public Comments

President Adewale opened the floor for member and public comments, limiting each speaker to three minutes. Seven individuals—Luke Garrett, David Montes, Amanda Pollard, Randy Winn, Kelly Schmidt, M. Long, and Anne Watanabe—provided comments, all expressing opposition to the United States Department of Justice (DOJ) proposed rule and urging the Board to respond to the proposal during the public comment period.

President Adewale thanked all commenters for their participation and assured them that their input would be considered in the Board's deliberations.

Executive Session

The Board entered executive session at 3:50 p.m. to receive and discuss legal advice regarding (1) the rule

proposed by the DOJ on the review of state bar complaints and allegations against DOJ attorneys, and (2) an amendment to the Service Members Civil Relief Act. The executive session concluded at 4:21 p.m. and the Board returned to public session.

Discuss Potential Action with Respect to a Proposed Rule by the United States Department of Justice: Review of State Bar Complaints and Allegations Against DOJ Attorneys

The Board discussed the proposed rule, which would give the DOJ a "right of first review" of ethics complaints filed against DOJ attorneys, as well as give the DOJ authority to restrain state disciplinary enforcement action while the DOJ conducted its review. Discussion addressed the legal and practical flaws in the DOJ's proposed displacement state enforcement proceedings and the importance of maintaining intact state authority over attorney conduct. Members of the Board noted the significance of submitting a comment to ensure standing in any future litigation.

Gov. Parvin Price moved that the WSBA submit a comment opposing the proposed rule, with the comment to be drafted by Chief Disciplinary Counsel and reviewed and signed by President Adewale. The motion passed with one negative vote.

**Adjournment**

There being no further business, President Adewale adjourned the meeting at 4:45 p.m. on Wednesday, April 1, 2026.

Respectfully submitted,

Terra Nevitt
WSBA Executive Director & Secretary

DRAFT

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:** February 10, 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:** April 16, 2026

**RE:** Executive Director's Report

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February 2026 Bar Exam Results

Congratulations to the 280 people that recently passed the attorney licensing exam. The overall pass rate was a little under 50%, which is a slight improvement over the winter exams held in 2025 (43%) and 2024 (47%). Note that the passing score for this exam was lowered from 266 to 260, by order of the Washington Supreme Court, on December 8, 2025. You can find the pass list and exam statistics here. This last administration of the legacy uniform bar exam was held in February at the Tacoma Convention Center. Washington (along with Idaho and Oregon) is now among the first group of states that will begin administering the NextGen Bar Exam in July. The July exam will be held at the Yakima Convention Center.

Take the Law Day Pledge

On May 1, we are calling 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 will be 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. Learn more and take the pledge here.

Our Law Day activities are part of WSBA's Rule of Law Ambassador Program, which is intended to equip legal professionals to fulfill one of their most important professional obligations: "To further the public's understanding of and confidence in the rule of law and the justice system." To join us, please email ambassadors@wsba.org to join our ambassador listserv to receive news, resources, and updates.

Introducing: WSBA Volunteer Spotlight

As part of our volunteer appreciation efforts, the WSBA has launched the Volunteer Spotlight feature in *Bar News*, which highlights individuals who make a meaningful impact through their service to the Bar and the broader legal community. Volunteers can be nominated through a simple submission form. Our first spotlight feature is in the current April/May 2026 issue of *Bar News* and celebrates the contributions of long-time volunteer, Ann Guinn. You can read the article in your hardcopy issue or in the online edition here. We're proud to be able to better recognize the dedication, leadership, and generosity of volunteers who help strengthen our profession. For questions, contact Paris Eriksen (parise@wsba.org).

WSBA Amicus Brief filed in Perkins Coie Lawsuit

On April 3, pro bono counsel at Davis, Wright, Tremaine - Caesar Kalinowski IV and Ambika Kumar – filed an amicus brief in the U.S. Court of Appeals for the D.C. Circuit supporting Perkins Coie and other law firms challenging executive orders that impose restrictions on firms based on their client representations and advocacy. Our brief was joined by the Oregon State Bar and the California State Bar.

Entity Regulation Pilot Test

We continue to receive and process applications for the pilot. Following the Practice of Law Board's unanimous vote to recommend authorization of our first applicant, Legata Inc., we have filed the application materials and proposed order with the Supreme Court. The Court is conducting a careful evaluation and will continue its review at the upcoming En Banc. For more information, including links to the applications received so far, please visit https://www.wsba.org/about-wsba/entity-regulation-pilot. If you have any questions, please contact Chief Regulatory Counsel Renata Garcia at renatag@wsba.org.

Portfolio Evaluation: A New Pathway for Admission

The Licensure Pathways Implementation Steering Committee recently approved suggested amendments to the Admission and Practice Rules to implement a new pathway for lawyer admission, Portfolio Evaluation. The suggested amendments have been sent to the Supreme Court for their consideration. Visit https://www.wsba.org/portfolio-eval for the latest details, including the report from the Implementation Steering Committee, a handy one pager factsheet, and more. If you have any questions, please contact Chief Regulatory Counsel Renata Garcia at renatag@wsba.org.

Attachments

FY25 Summary of WSBA Section Activities
Q2 2026 Budget Reallocations
ED Media Report
Member Demographics Report
Litigation Report (confidential)

WASHINGTON STATE BAR ASSOCIATION

TO: Terra Nevitt, Executive Director

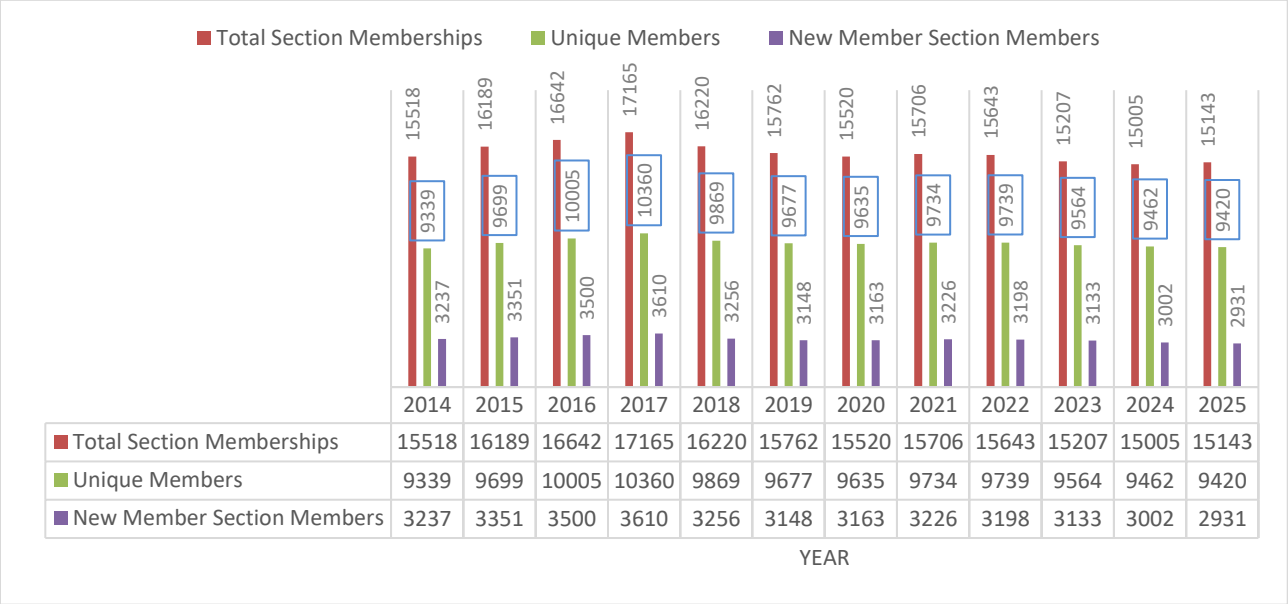
FROM: Kevin Plachy, Director of Advancement
Julianne Unite, Member Services and Engagement Manager
Carolyn MacGregor, Sections Program Specialist
Noah Baetge, Sections Program Coordinator
Vanessa Sweeney, Member Services and Engagement Program Coordinator

RE: WSBA Sections 2025 Annual Summary Memo & Section Annual Reports

DATE: February 10, 2026

Washington State Bar Association ("WSBA" or "Bar") Sections are entities of the Bar created and tasked to carry on the work of the WSBA and further their purposes as defined in the WSBA Bylaws and further articulated in individual section bylaws. Approximately 22% of all WSBA members belong to one or more of the WSBA's 29 sections.[1] Each year, section executive committees (also referred to as "section leaders" collectively) and WSBA staff work together to increase and improve the benefits and support available to section members. Sections generally rely on membership dues, CLE registration revenue, and publication royalties to fund their activities. Per the WSBA Bylaws XI.K, each WSBA section is required to submit an annual report to the WSBA Executive Director.

**Section Membership Numbers Over the Years[2]**




| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Section Memberships | 15518 | 16189 | 16642 | 17165 | 16220 | 15762 | 15520 | 15706 | 15643 | 15207 | 15005 | 15143 |
| Unique Members | 9339 | 9699 | 10005 | 10360 | 9869 | 9677 | 9635 | 9734 | 9739 | 9564 | 9462 | 9420 |
| New Member Section Members | 3237 | 3351 | 3500 | 3610 | 3256 | 3148 | 3163 | 3226 | 3198 | 3133 | 3002 | 2931 |

YEAR

[iii]

[1] Based on December 1, 2025, WSBA Member Demographic Reports and December 2, 2025, data from WSBA Regulatory Services Department.

[2] Reflects calendar/licensing year and based on December 2, 2025, data from WSBA Regulatory Services Department.

**Summary of WSBA Sections for 2025** (January 1, 2025 – December 1, 2025):

- **15,143** section memberships.[3]
- **347** section leader volunteers across all 29 sections.[4]
- **$30** average dues amount to join a section in 2025 (range $20-$40). Current law student rate is $18.75[5] (as of October 1, 2025). Law student rate was $18.45 (January 1-September 30, 2025).

**In FY2025, WSBA sections provided the following member benefits[6]:**

- **76** section-sponsored educational programs with WSBA: CLE seminars (22) and mini-CLEs (54).[7]
- **$160,894** awarded in scholarships donations and/or grants.[8]
- **15** law school/student and new lawyer outreach events/benefits.
- **Over 450** legislative bills reviewed/drafted.
- **10** newsletters produced.
- **18** receptions or forums (non-CLE).

**Sections Team: Internal Highlights & Goals in FY2025**

The "Sections Team" is comprised of 2.5 WSBA FTEs[9] dedicated to the support and success of the 29 WSBA Sections through close partnership with section executive committees. In addition, several other staff members/departments throughout WSBA provide section-related support at different times, including staff from finance/accounting, CLE, legislative, regulatory, and communications.

*The Sections Team provided valuable benefits to section members through the following:*

- Provided guidance on WSBA policies and procedures pertaining to sections.
- Supported activities to foster sustainable sections.
- Supported a pipeline of future leaders.
- Facilitated collaboration between sections and other WSBA programs/efforts.
- Assisted with section member recruiting efforts.

*The Sections Team highlights during FY2025 include:*

- Hosted a virtual Fall Section Leaders Re-orientation in October 2024, which included speakers WSBA President Sunitha Anjilvel, Executive Director Terra Nevitt, and other WSBA staff

[3] Based on December 1, 2025, WSBA Member Demographic Reports. Section memberships range between 62 – 2,187 members.

[4] Based on committee member totals pulled from Personify for FY25. Includes New Member Liaisons; does not include BOG liaisons.

[5] The law student rate mirrors the per-member charge for a given fiscal year.

[6] Unless otherwise cited, all information was gathered from the completed FY2025 annual reports received from 24 of the 29 section executive committees.

[7] Based on data obtained from WSBA-CLE and accounting team on December 5, 2025.

[8] Based on year-to-date actual scholarships/donations/grant expense budget line in the September 2025 Monthly Financial Reports.

[9] The following positions are included in FTE count: Sections Program Specialist, Sections Program Coordinator, Member Services and Engagement Manager, and Member Services and Engagement Program Coordinator.

leadership. The orientation also included sessions on court rules, social media guidelines and support, partnering with WSBA CLE, and Sections resources and best practices. Attendance included 39 section leaders.

- Presented the annual Spring Section Leaders Meeting virtually in April 2025, inviting WSBA staff leadership to present on Sections program updates and budget planning. The program also included a panel of section leaders presenting on section benefits and member engagement, followed by discussion in breakout groups. Twenty-seven section leaders attended the meeting.
- Assisted sections and provided staff support for section events such as receptions, panels, and roundtables, presented in various formats (e.g., virtual, hybrid, in person).
- Continued monthly publication of the *Sections Bulletin*, including our regular "Did You Know" item highlighting various tools and tips that WSBA offers volunteers and members, and a Section Spotlight item. The *Bulletin* is intended to provide section leaders with up-to-date information regarding WSBA matters and events; best practice tips; supplemental resources regarding leadership, diversity, and educational development; and to connect sections with existing and relevant WSBA programs.
- Provided individualized support to section executive committees, including, but not limited to: design and implementation of member surveys; virtual, hybrid, and in-person event planning; financial and data analysis; guidance through the bylaws amendment approval process; facilitation of section newsletter review and production; section webpage formatting and content updates; support during executive committee retreats; and assistance developing and growing mentorship programs.
- Offered numerous drop-in sessions: two elections prep sessions for section leaders; two information sessions for interested applicants to section executive committees, and one for section leaders on budget planning.
- Completed a successful budgeting process, including review of budget histories and follow-up with sections before budgets were submitted to the Budget & Audit Committee.
- Engaged in ongoing collaboration with CLE, Legislative, Communications, and Finance staff to update materials and processes related to sections.
- Continued the Sections Noon Discussion Series with the following sessions:
    - January session on Section Member Recruitment Strategies led by Solo & Small Practice Section EC member Ann Guinn, and Communications Team staff member Connor Luk. with 13 section leaders in attendance.
    - July session on EC Member Onboarding, led by Manager of Volunteer Engagement Paris Eriksen and a panel composed of leaders from other WSBA entities. Eleven section leaders attended.
- Maintained and updated the online "Volunteer Toolbox," which includes section leader meeting recordings/materials, new tools, and resources for section leaders to utilize when planning and implementing their activities (e.g., templates, meeting tools, and policies).
- Compiled information and data from section annual reports and regulatory services to create annual section "Year in Review" infographs, with design support from the Communications Design Team.
- Worked closely with IT staff and section officers to administer section executive committee elections for all 29 sections.
- Worked closely with Member Services and Engagement Specialist Chelle Gegax to support and promote the Young Lawyer (now New Member) Liaison to Sections program.

**Sections Team: Internal Goals for FY2026**

The primary areas of focus for the Sections Team in FY2026 include continued support for section member and section leader recruitment; using improved communications and tools for virtual meetings and events; exploring innovative member benefit ideas; promoting collaboration among sections; fostering relationships between sections and the Board of Governors; and continuing engagement with section leaders through the annual spring update session, fall meeting programming, and Sections Discussion Series.

**WSBA FY2025 Section Annual Reports**

Included with this memo are the FY2025 section annual reports submitted by 26 of 29 section executive committees.

WASHINGTON STATE BAR ASSOCIATION

**13047.23**

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Administrative Law Section |
| **Chair or Co-Chairs:** | Susan Dumph |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Parvin Price |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The purpose of the Administrative Law Section is to seek participation of all interested members of the Bar to benefit section members, their clients, and the general public by: Exchanging ideas and sharing knowledge in administrative law, including the Washington Administrative Procedure Act, Public Records Act, and Open Public Meetings Act, through CLEs, publications, meetings, and other means of communication; Initiating and implementing common projects; Improving and facilitating the administration of justice in administrative law through the review of pending legislation and regulations, the development of proposed statutes, and the promotion of uniformity in legislation and administration; and providing other services that may benefit section members, the legal profession, and the public. | |
| **Strategy to Fulfill Purpose:** | |

The Section's Diversity Outreach Committee actively solicits and recruits individuals to join the Administrative Law Section through recruiting events. The Section's Nominating Committee actively solicits and recruits individuals to join the Section' Executive Committee when openings arise. The Section's CLE Committee routinely hosts and puts on Mini-CLEs concerning various topics in administrative law. The Section's Legislation Legislative Committee tracks pending legislation, writes articles on legislative activity and agency actions, and where appropriate gives feedback back to the WSBA Legislative Liaison on pending legislation of concern to the section. The Section's Newsletter Committee publishes a Newsletter that includes articles on administrative law, and advertises events like the Section's CLEs; the Homan Award Committee solicits and reviews nominations for the Homan Award and awards it to individuals who have shown a strong dedication and commitment to administrative law through their actions and accomplishments. The Section's Publications and Practice Manual Committee ensures that the Section's Public Records Act Deskbook and Administrative Law Practice Manual are updated regularly and published.

**How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?**

The Section's purpose furthers this mission through the exchange of ideas and sharing of knowledge via publications the Section produces (The Public Records Act (PRA) Deskbook & Administrative Law Practice Manual); the CLEs it sponsors and produces; the Newsletter it publishes with articles and case law summaries; tracking proposed legislation and agency actions and best practices; and providing current knowledge on administrative law to the public and members of the Bar. It serves to better the practice of administrative law in Washington through both knowledge and awareness, which aids members of the Bar in championing justice

**Top 2024-2025 Section Accomplishments:**

Between October 1, 2024 and September 30, 2025, the Executive Committee held regular meetings via TEAMs video conferencing. These were typically scheduled for the third Monday of each month, unless an alternative date was chosen due to conflicts.

Mini-CLEs were produced on topics including the Computer Fraud and Abuse Act, Teacher Discrimination & Strict Liability, and IDEA/Special Education Issues in an Administrative Practice.

The Section authorized our Legislative Committee to send the Attorney General's Office (AGO) an expression of interest in the AGO's announced review of certain of its model Public Records Act (PRA) rules in response to a petition submitted by various media groups. The AGO issue WSR 22-21-023, a CR 101 Proposal Statement of Inquiry concerning possible changes to "WAC 44-14-010 through 44-14-040." This would include WAC 44-14-030(2) regarding record indexes. This letter included preliminary input on how that model rule and its related Comment could be corrected and improved. This expression of interest on the part of the Section did not result in our being included in any discussions between the AGO and the media petitioners about the proposed changes, if any, to the model rules. Our

leaders in this effort were Richard Potter, Chairman of the Legislative Affairs Committee, and John Gray.

**Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**
*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*
*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.*

| | |
|---|---|
| **1** | **Develop at least 5 Mini-CLE presentations for the year** |
| **2** | **Annual Meeting/Retreat Development** |
| **3** | **Increase Newsletter Production to 3 – 4 times per year** |

**Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.*

| | |
|---|---|
| **1** | **Increase awareness in the Section re: the Homan Award** |
| **2** | **Further development of the Mentorship program** |
| **3** | **Begin work on updates for Section publications** |

**Please describe how this entity is addressing diversity, equity, and inclusion:**
*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?*

The Administrative Law Section is involved in all areas of administrative law of interest to Washington lawyers, including Washington State administrative law, federal administrative law, tribal administrative law, and interstate compact administrative law. We recognize that most attorneys in Washington practice some type of administrative law, even if they never directly apply the Washington Administrative Procedure Act. The Section welcomes anyone as a member who has an interest in administrative law. Our members include: Assistant attorneys general; Public agency in-house attorneys; City attorneys (on private contract as well as municipal employees); County prosecutors; Private practitioners who represent clients subject to government regulation; Judicial officials; and Administrative Law Judges. The Section's Executive Committee strives to recruit members and board members from historically underrepresented backgrounds, LGBTQ+ attorneys, young/new attorneys, and attorneys from all over the state. The Section's Diversity and Outreach co-chairs have focused primarily on both creating awareness within the Section leadership about bias, equality and equity while developing a mentorship program that is designed to provide guidance and support to new and underrepresented attorneys as they begin their practice in administrative law. Instead of working directly with minority bar associations, we are focused on developing a Section that is inclusive and supportive of minorities in the practice area which we hope will foster a diverse population for the practice in the future. In addition, the Section tries to recruit attorneys for the Section Executive Committee and sub-

committees who have been practicing for a broad range of years, including attorneys who are planning for retirement and attorneys who have just begun their careers. We encourage all board and committee members—including new attorneys—to serve in all leadership positions, including as Section officers and Committee chairs. The Section's Young Lawyer Liaison is a voting member of the Section's Executive Committee.

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**

*For example:*

- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

The Administrative Law Section has regular communication with our Section liaisons, particularly Carolyn MacGregor. She regularly attends our Section meetings and we could not be happier with the assistance we receive. The liaisons coordinate with the Section's graphic designer and WSBA legal counsel to review content in the draft Newsletter before publication. WSBA staff assist with the technical details and On24 support that help us create a more successful and accessible continuing legal education program. The Section also has the opportunity to interact with WSBA staff regarding legislation related to administrative law. Also very much appreciated is the annual new leaders orientation sponsored by the Bar in the fall.

**Please quantify your section's 2024-2025 member benefits:**

*For example:*

- *$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

| | |
|---|---|
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| Annual Meeting/Retreat at Alderbrook w/ CLE re: ADA | Receptions/forums hosted or co-hosted |
| Click or tap here to enter text. | $ amount given through donations/scholarships/grants. |
| | Newsletters/publications produced |
| 3 Mini-CLEs produced | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| We did not receive any nominations this FY for the Homan Award | Recognitions/Awards given |

| | |
|---|---|
| During the 2025 "long session" of the Washington legislature, the Section's Legislative Committee reviewed 24 bills (not counting companion bills) and monitored 19 of them as they moved through the legislative process. The areas of interest to the committee were the Administrative Procedure Act (34.05 RCW), the Public Records Act (42.56 RCW), the Open Public Meetings Act (42.30 RCW), the Office of Administrative Hearings law (34.12 RCW), and other statutes that affect administrative agency procedures, processes, hearings, rulemakings, appeals/judicial review, etc. (as opposed to the substantive law implemented by agencies). Ten bills of interest were passed by the legislature. The committee reported on these bills in the Section's newsletter. In 2025 the Section continued to monitor state agency rulemakings and to submit comments and testify on best practices for complying with the records indexes requirements of RCW 42.56.070(5) in the Public Records Act. It also advised state agency staff on creating their agency's online records indexes. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 242 | **Membership Size**:<br>*As of September 30, 2025.* |
| | 13047.23 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | 429 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 15 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 1 | **Number of Vacancies for FY26:** |

| | | |
|---|---|---|
| | | *The number of vacant positions as of October 1, 2025 (FY26).* |
| | 6 | **Number of Applicants for FY26 open positions**: *Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE
BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Business Law Section |
| **Chair or Co-Chairs:** | Barbara Prowant |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Kevin Fay |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The purpose of the Section shall be to benefit the members of the Section and their clients: (a) By encouraging research and study, and the development of best practices, in the area of business law in the State of Washington, and sharing these efforts through continuing legal education where possible and appropriate; (b) By participating in the development of state legislation and regulations in order to improve and facilitate the administration of justice in the area of business law; and (c) By undertaking such other services relating to the area of business law as may be of benefit to members of the Section, members of the Bar and the greater public. | |
| **Strategy to Fulfill Purpose:** | |

| |
|---|
| CLE's organized by Committee Sections to provide member relevant education opportunities; proposed legislative changes coordinated with the WSBA Legislative Affairs; sponsored networking and volunteer events for the members; coordinated and sponsored UW and Seattle U Law School events. |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** |
| The Section seeks to promote professionalism among our members by creating opportunities that promote building and fostering personal relationships among business attorneys across the State and by providing a forum for the discussion and exchange of ideas leading to the improvement of laws relevant to the practice of business lawyers. |
| **Top 2024-2025 Section Accomplishments:** |
| BLS Executive Committee Planning Retreat |
| Proposed revisions to the LLC Act; provided feedback on proposed HB 1635; considered the Uniform Mortgage Modification Act |
| Coordinated and sponsored outreach programs at UW Law School and Seattle U Law School; coordinated volunteer opportunity for the members with Food Lifeline; sponsored a Mariners networking event for the members; co-sponsored a joint networking event with AIPP Seattle KnowledgeNet |
| Filled the Financial Institutions Chair, Communication Chair (resulting in creation of a BLS LinkedIn page), and Young Lawyer Liaison positions which had been vacant for some time. |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* |

| | |
|---|---|
| **1** | **To be provided by the incoming Executive Committee** |
| **2** | Click or tap here to enter text. |
| **3** | Click or tap here to enter text. |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **Increase BLS membership and member engagement.** |
| **2** | **Continue to provide beneficial CLE programs, as well as networking and volunteer opportunities for the members.** |
| **3** | **Continue the BLS tradition of legislative participation.** |

**Please describe how this entity is addressing diversity, equity, and inclusion:**
*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?*

**The BLS EC has an "open-door" policy that encourages the members to be included in decision-making. It promotes a culture of diversity, equity, and inclusion as evidence by the composition of the Executive Committee represented by 50% women, racial and ethnic minorities.**

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**
*For example:*

- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

**We appreciate our working relationship with the WSBA staff who provide assistance to help the Section and its programs and outreach operate smoothly, and the involvement and communication provided by Kevin Fay, our BOG representative, regarding BOG matters.**

**Please quantify your section's 2024-2025 member benefits:**

*For example:*

- *$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

| | |
|---|---|
| 2 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| 1 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 1 | Receptions/forums hosted or co-hosted |
| $5000 – donation; $3383 – scholarships | $ amount given through donations/scholarships/grants. |
| BLS LinkedIn created | Newsletters/publications produced |
| 7 | Mini-CLEs produced |
| 3 | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |

| | |
|---|---|
| 3 | Legislative activity (Bills reviewed, tracked, proposed) |
| LinkedIn Page created | Other (please describe): |
| Volunteer and networking events | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 1150 | **Membership Size**:<br>*As of September 30, 2025.* |
| | 36921.11 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | 21212.14 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 19 voting/1 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 3 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 18 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Creditor Debtor |
| **Chair or Co-Chairs:** | Jerry Todd Tracy |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Todd Bloom |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| Provide continuing legal education programs on topics of interest to the section membership with the purpose of devoting revenue generated from said programs to debt related legal clinics or debt related education organizations; Provide communication amongst members of the section; Review and comment on proposed creditor-debtor legislation. | |
| **Strategy to Fulfill Purpose:** | |
| The Section sponsors continuing legal education programs that generate revenues which are then distributed, in the form of grants, to statewide legal programs or debt related education organizations. The Section also distributes information to members on the Section List-Serve re opportunities with the Court and regarding important legislation impacting section members. | |

| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** | |
|---|---|
| Click or tap here to enter text. | |
| **Top 2024-2025 Section Accomplishments:** | |
| Provide grant funding of $5,000 to low income legal clinics across Washington. We awarded $2,000 to the Benton County Legal Aid Society and $3,000 to the Northwest Consumer Law Center. | |
| Provide quality CLE programs, including the bi-annual liens seminar; The Section also provided co-sponsorship (Oregon State Bar) of the Northwest Bankruptcy Institute. | |
| Review and comment on proposed legislation that is referred to the Section by WSBA that might have direct impacts on Section members. The Section will send out, via the listserve, summaries of some of the legislation that is of primary importance to section members and solicit input. | |
| Maintain active discussions amongst section members via the section list-serve. | |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* | |
| **1** | **Increase membership in the section** |
| **2** | **Provide more CLE opportunities to section members through regular mini-cles** |
| **3** | **Manage the section budget carefully to increase annual grant award** |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **Increase grant award to the $10,000 annual awards that have been given in the past.** |
| **2** | **Utilize YLD liaisons to assist with mini-CLE programming** |
| **3** | **Increase EC member involvement in setting up new programming in all of the state and not be as Western Washington "centric."** |
| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* | |

The Creditor Debtor Section's Executive Committee is aware of the need to be inclusive in all our activities. We are inherently diverse in that some of us represent creditors, some of us represent debtors, and others represent both. The Executive Committee strives to recruit candidates that represent members from historically underrepresented backgrounds. We strive to take positive steps to deal with those issues and the Section welcomes any member of the Bar that is interested in a substantive area of practice that we are involved with. We also strive to embrace the cultural differences that make interaction amongst us more interesting. The Section has not utilized the services of the WSBA Diversity Specialist and have not had any contact with or from that person. The Executive Committee continues to keep its focus on the issues of diversity and inclusion, together with the issue of avoiding inappropriate discrimination in our activities.

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**

*For example:*

- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

Click or tap here to enter text.

**Please quantify your section's 2024-2025 member benefits:**

*For example:*

- *$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

| | |
|---|---|
| 1 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| 1 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 0 | Receptions/forums hosted or co-hosted |
| $5,000.00 | $ amount given through donations/scholarships/grants. |
| 0 | Newsletters/publications produced |
| 0 | Mini-CLEs produced |
| 0 | New Lawyer Outreach events/benefits |
| 0 | Recognitions/Awards given |
| Before and during the legislative session, the EC leadership team and the legislative liaison receive e-mails from the WSBA that it thinks might be of impact to our section. | Legislative activity (Bills reviewed, tracked, proposed) |

| | |
|---|---|
| When those e-mails arrive, the information is sent to all members of the Executive Committee who review and respond according to the WSBA Protocols. If the Executive Committee wants to seek additional opinions from the section members, we will seek input via the listserve. | |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 404 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $16131.85 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | 5000.00 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 13 voting/2 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 6 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Civil Rights Section |
| **Chair or Co-Chairs:** | David Montes |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Tom Ahearne |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The mission of the Section shall be to educate and advocate for civil liberties and equal rights in the context of civil rights law and the legal issues of Washington State residents, with particular focus on those who have traditionally been denied such rights and equal treatment under the law including, but not limited to, racial, ethnic, or religious minorities; elderly; gay, lesbian, bisexual or transgendered; immigrants; mentally or physically disabled; impoverished; and homeless. | |
| **Strategy to Fulfill Purpose:** | |
| We are currently reviving the section from a bit of a lull, so we are working on a full picture of what the section will do. We envision that the section will put on CLE's related to various areas of civil rights law and practice. We also intend to have in person networking events to connect practitioners and start to publish a newsletter. | |

| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** | |
|---|---|
| Civil rights law attempts to champion justice for the most vulnerable among us. By providing education to practitioners and helping people who wish to be involved in civil rights litigation a path to such involvement, we seek to champion justice. | |
| **Top 2024-2025 Section Accomplishments:** | |
| 3 Online CLEs since November, 2024. | |
| 1 in person networking event in July of 2025. | |
| Click or tap here to enter text. | |
| Click or tap here to enter text. | |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* | |
| **1** | **Host three additional CLEs.** |
| **2** | **Host at least one in person event.** |
| **3** | **Publish bimonthly news letters.** |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **Build section membership and engagement.** |
| **2** | **Build the section as a resource for practitioners.** |
| **3** | Click or tap here to enter text. |
| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* | |
| **We have had open executive committee meetings and largely free CLEs at this point. We have not taken any action that would exclude any person. Moreover, we have tried to engage participation from organizations run by people from the communities we wish to serve.** | |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions* | |



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| | |
|---|---|
| • *Involvement with Board of Governors, including assigned BOG liaison*<br>• *Ideas you have on ways WSBA can continue to strengthen/support your entity.* | |
| Click or tap here to enter text. | |
| **Please quantify your section's 2024-2025 member benefits:**<br><br>*For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* | |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 1 | Receptions/forums hosted or co-hosted |
| Click or tap here to enter text. | $ amount given through donations/scholarships/grants. |
| Click or tap here to enter text. | Newsletters/publications produced |
| 3 | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 166 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $5693.21 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $360.00 | **FY25 Direct Expenses ($)** |



Classified as Confidential

| | | |
|---|---|---|
| | | *As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 10 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 7 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 5 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Construction Law Section |
| **Chair or Co-Chairs:** | Bryce Sinner |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Francis Adewale |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The purpose of the Section shall extend to the field of public and private procurement and construction matters, with emphasis upon laws, regulations, and administrative, and court decisions affecting the same. The purposes of this Section are to promote the education of Washington State Bar Association members in laws, regulations, and administrative and court decisions affecting such procurement and construction, the sound development of relevant laws and regulations, to cooperate in that endeavor with the American Bar Association and its sections, and to promote the objects of the Washington State Bar Association (hereinafter referred to as "WSBA"). | |
| **Strategy to Fulfill Purpose:** | |
| The Construction Law Section fulfills its purpose by promoting member education, professional development, and community engagement. This includes issuing regular newsletters with updates on legislation, regulations, and court decisions; holding monthly Executive Committee meetings to | |

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| oversee activities and subcommittees; and hosting annual Continuing Legal Education events such as a mid-year CLE in Seattle on the second Friday of June, a road trip CLE planned for Spokane in early 2026, and seasonal forums featuring expert speakers and site visits. The Section also provides members exclusive access to practical resources like editable contract templates, publishes and updates the authoritative Construction Law Deskbook to support practitioners, facilitates mentorship and outreach programs that support the professional growth of law students and practitioners, and organizes community service and volunteer initiatives. Additionally, the Section is exploring opportunities to collaborate with a Washington law school to offer a class in Construction Law. |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** |
| The Construction Law Section furthers the WSBA's mission by educating members on industry-specific legal issues, which supports the integrity of the legal profession. The Section also champions justice by creating and providing neutral construction contracts and other practical resources, as well as engaging in community service initiatives. |
| **Top 2024-2025 Section Accomplishments:** |
| Successfully hosted the midyear Continuing Legal Education (CLE) event in June, featuring comprehensive updates on construction law and engaging judicial panels. |
| Organized a well-attended site visit to the new Seattle Aquarium in March 2025, providing members with a unique opportunity for legal and industry engagement. Organized an opportunity for section members to attend a Mariner's game to facilitate interaction and camaraderie among construction law practitioners. |
| Published and distributed multiple quarterly newsletters, offering critical case updates, legislative news, and Section announcements to members. |
| Updated and enhanced the Section's LinkedIn presence and other social media platforms to improve communication, outreach, and member engagement. |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* |

| | |
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| **1** | **Successfully plan and execute the midyear CLE event by June 2026** |
| **2** | **Regularly publish and distribute the Construction Law Section newsletter** |
| **3** | **Organize and host a road trip CLE event on the Eastside of Washington by March 2026 to increase regional member participation** |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **Expand statewide outreach to increase active participation of members from underrepresented regions, including Eastern Washington, through targeted programming and regional events.** |

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| **2** | **Develop and maintain comprehensive digital resources, including an updated online Construction Law Deskbook and practical contract templates, ensuring they remain current with legal developments.** |
| **3** | **Foster collaboration with Washington law schools to establish a sustainable Construction Law education pipeline, including expanded mentorship programs and potentially a credited course offering. Explore collaboration with the ABA's construction law writing contest to create an opportunity for Washington law students to participate, with a WSBA-sponsored award offered in addition to the recognition provided by the ABA.** |

**Please describe how this entity is addressing diversity, equity, and inclusion:**
*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?*

**The Construction Law Section addresses diversity, equity, and inclusion through its dedicated DEI Subcommittee, which focuses on strategies to diversify both the committee and attract diverse attorneys to the practice area. Recently, the Section amended its Bylaws to grant the Young Lawyer Liaison voting rights, increasing new and young members' input in decision-making. The committee remains committed to ongoing efforts to increase inclusivity and diverse leadership within the Section.**

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**
*For example:*
- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

**Noah and Carolyn have been excellent to work with—very responsive and always willing to assist. Carolyn regularly attends our meetings and is able to provide immediate answers or promptly follows up when needed. However, we have not observed much involvement from the Board of Governors or our assigned BOG liaison. At this time, we do not have specific suggestions for enhancing WSBA support but remain open to any ideas the WSBA may offer to strengthen our collaboration.**

**Please quantify your section's 2024-2025 member benefits:**

*For example:*
- *$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

| | |
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| None this year | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |

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| Hosted one full-day CLE with discounted tuition for Section members | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| Multiple events, including a site visit to the new Seattle Aquarium and a Mariners game gathering | Receptions/forums hosted or co-hosted |
| None this fiscal year | $ amount given through donations/scholarships/grants. |
| Two newsletters published | Newsletters/publications produced |
| None this year | Mini-CLEs produced |
| Conducted "Lunch with Lawyers" events for law students and engaged with local law schools for outreach | New Lawyer Outreach events/benefits |
| Presented a Lifetime Achievement Award to Paul Cressman | Recognitions/Awards given |
| No formal legislative activity this year | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 476 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $25712.74 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $4003.29 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 16 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:** |

| | | |
|---|---|---|
| | | *The number of vacant positions as of October 1, 2025 (FY26).* |
| | 8 | **Number of Applicants for FY26 open positions**: *Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Corporate Counsel Section |
| **Chair or Co-Chairs:** | Bryn Aaron Peterson |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Kevin Fay |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The purposes of the Section shall be to: (a) provide continuing legal and other education for its members in areas of common interest to lawyers serving as corporate counsel; (b) provide opportunities for Section members to become better acquainted with other attorneys with similar interests; (c) provide a forum for the exchange of ideas and discussion about issues of common interest to Section members; (d) provide advice to the Bar, as requested, on proposed legislation, Bar rules and other matters; and (e) undertake such other services that may be of benefit to the public and the Bar | |
| **Strategy to Fulfill Purpose:** | |
| Host events; network; publish CLEs; listen to our members. We will do a survey this year to better understand what our members want and do not want. | |

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| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** |
| We look to better educate our members so they can champion justice at their companies and public. |
| **Top 2024-2025 Section Accomplishments:** |
| One mini-CLE with attendance of about 55 members. |
| Click or tap here to enter text. |
| Click or tap here to enter text. |
| Click or tap here to enter text. |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* |

| | |
|---|---|
| **1** | **Conduct a survey to better understand what our members want and do not want.** |
| **2** | **Do a one-day Corporate Law Institute.** |
| **3** | **Do what our members want based on what they say they want in the survey.** |

| | |
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| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **Determine how to better serve our members and do it.** |
| **2** | Click or tap here to enter text. |
| **3** | Click or tap here to enter text. |

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| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* |
| **We will continue to recruit leadership and members from historically underrepresented backgrounds.** |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions*<br>• *Involvement with Board of Governors, including assigned BOG liaison*<br>• *Ideas you have on ways WSBA can continue to strengthen/support your entity.* |

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| **So far so good.** | |
| **Please quantify your section's 2024-2025 member benefits:**<br><br>*For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* | |
| None planned at this time. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| We will do a one day CLE seminar. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| If the member survey tells us these are what our members want we will do them. | Receptions/forums hosted or co-hosted |
| Our goal is to donate 5K per year. | $ amount given through donations/scholarships/grants. |
| NA | Newsletters/publications produced |
| We usually do a few of these a year. | Mini-CLEs produced |
| NA | New Lawyer Outreach events/benefits |
| NA | Recognitions/Awards given |
| NA | Legislative activity (Bills reviewed, tracked, proposed) |
| What we do this year will be dictated by our member survey, which we are working on right now. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 969 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $28452.45 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | 8693.01 | **FY25 Direct Expenses ($)** |

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| | | *As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 19 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 3 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 2 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

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**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Criminal Law |
| **Chair or Co-Chairs:** | Dan LeBeau |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Allison Widney |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| To provide a forum for the exchange of ideas in the areas of criminal law, correction, procedure, and evidence. | |
| **Strategy to Fulfill Purpose:** | |
| Coordinate regular virtual and in-person meetings with prosecutors, defense attorneys, and individuals interested in criminal law. | |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** | |
| The Criminal Section provides continuing education on topics for practitioners of all experience levels. The most recent Criminal Justice Institute focused on providing practical advice for attorneys with | |

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| limited experience with criminal law. CJIs focus on current topics and recurring issues from a global and holistic view of the law. | |
| **Top 2024-2025 Section Accomplishments:** | |
| 32nd Annual Criminal Justice Institute | |
| Reviewed legislation and provided feedback as applicable. | |
| Click or tap here to enter text. | |
| Click or tap here to enter text. | |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* | |
| **1** | 33rd Annual CJI |
| **2** | Click or tap here to enter text. |
| **3** | Click or tap here to enter text. |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | Continuing annual Criminal Justice Institute trainings |
| **2** | Continued and increased input on legislation. |
| **3**<br>**4** | Quarterly lunchbox CLEs.<br>Review and update bylaws. |
| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* | |
| Our CJI routinely includes presentations on race, equity, and inclusion. For example, the 30th Annual CJI included a panel, "Race and Washington's Criminal Justice System," and a panel, "Fairer Outcomes Through Data." The 32nd CJI included a panel on immigration law. We have encouraged and appointed board members from diverse jurisdictions across the state. | |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions*<br>• *Involvement with Board of Governors, including assigned BOG liaison*<br>• *Ideas you have on ways WSBA can continue to strengthen/support your entity.* | |

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| Carolyn and Sally are very communicative and helpful. | |
| **Please quantify your section's 2024-2025 member benefits:**<br><br>*For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* | |
| 32nd Annual CJI, providing 6.5 credits | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| Click or tap here to enter text. | Receptions/forums hosted or co-hosted |
| Scholarship for CJI for one member: $275. | $ amount given through donations/scholarships/grants. |
| Click or tap here to enter text. | Newsletters/publications produced |
| Click or tap here to enter text. | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 327 | **Membership Size**:<br>*As of September 30, 2025.* |
| | 17884.30 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | 2823.21 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |

| | | |
|---|---|---|
| **Section Executive Committee Information:** | 17 voting/1 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 2 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 9 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

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**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[1]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Dispute Resolution |
| **Chair or Co-Chairs:** | Paula Emery |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Tom Ahearn |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The section promotes the informed use and best practices for all dispute resolution processes in Washington. | |
| **Strategy to Fulfill Purpose:** | |
| The Dispute Resolution Section provides resources, develops programs, and addresses legal, legislative and public policy issues to: 1) enhance the skills of dispute resolution practitioners; 2) educate the public in the availability and use of party-determined solutions; and 3) assist the growth and development of dispute resolution services across the State of Washington. | |

[1]

| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** | |
|---|---|
| Educating members of the Bar and the public about Dispute Resolution serves to bring awareness to nonlitigation methods of resolving disputes. These methods can be more efficient, less expensive, faster, allow party control of the process, provide for the use of experts in the subject matter as decision-makers, and allow privacy in the dispute resolution process. We also serve members of the Bar by bringing CLE opportunities in DR subjects and procedures, by holding networking events, and by providing channels to communicate with other Section Members and with other DR professionals or interested parties. Additionally, we monitor and, as appropriate, support the development of and comment upon legislation to further ensure the integrity and utility of DR processes. | |
| **Top 2024-2025 Section Accomplishments:** | |
| Sponsored the 27th Northwest Dispute Resolution Conference, with 130 attendees and net positive section revenue. | |
| Cross-section collaboration and development work beyond the bar in legislative and public policy through session bill tracking and information gathering sessions, specifically in the areas of early mediation in family law dissolutions, foreclosure fairness and juvenile justice. | |
| Click or tap here to enter text. | |
| Click or tap here to enter text. | |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* | |
| **1** | **Increase attendance at 2026 NWDR Conference by 50%** |
| **2** | **Deliver 3 miniCLEs on topics of interest to practitioners and advocates with other sections** |
| **3** | **Engage a legal intern to research and report on dispute resolution investments noted in the RCWs, WAC and local court rules** |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **Increase section membership by 30%** |
| **2** | **Diversify section membership through outreach efforts and programming** |
| **3** | **Improve collaboration with other sections, to achieve economies of scale in delivering programming through volunteer section leaders** |

**Please describe how this entity is addressing diversity, equity, and inclusion:**
*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?*

**As the second oldest Section (in terms of the median age of our members), the DR Section has both unique challenges and opportunities in addressing systemic inequalities. We also enjoy the benefit of being able to welcome those who are not members of WSBA (or are ineligible to join WSBA) as DR section members. These members participate in a non-voting capacity as part of our section and contribute thought leadership and challenge siloed thinking that can inhibit the impact of DEI efforts. DEI topics are top of mind as the conference planning committee solicits and reviews presenter proposals. We have intentionally cultivated membership on the ExCom from recent law school graduates and will continue these efforts to produce programming that resonates for all experience levels and incorporates our members' lived experiences.**

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**
*For example:*
- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

**We have enjoyed close communications with and great support from our WSBA staff liaison and other WSBA personnel. They have helped us accomplish our projects and helped us negotiate WSBA filings and permissions, including shepherding amended section bylaws to BOG approval and navigating a tricky repair after a significant miniCLE challenge presented by the On24 platform. Carolyn frequently attends our monthly Executive Committee meetings. We continue to seek opportunities to deepen connections with the Board of Governors through our BOG liaison and especially appreciate the warm welcome received at the May Board of Governors meeting in Port Angeles.**

**Please quantify your section's 2024-2025 member benefits:**

*For example:*
- *$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

| | |
|---|---|
| | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Northwest Dispute Resolution Conference produced by the section and supported with in-kind contribution (facilities use) from the University of Washington School of Law | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| Click or tap here to enter text. | Receptions/forums hosted or co-hosted |

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| $1460.50 | $ amount given through donations/scholarships/grants. |
| Click or tap here to enter text. | Newsletters/publications produced |
| 1 miniCLE, Preparing Your Client for Mediation | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |
| Reviewed and tracked 8 bills in 2025 session | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 289 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $14441.26 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $6955.80 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 14 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 4 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for* |

| | | |
|---|---|---|
| | | *vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

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| **Name of Section:** | Elder Law Section |
| **Chair or Co-Chairs:** | Nicholas Pleasants |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Parvin Price |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| Improve WSBA members' understanding of the legal needs of older adults in Washington; (2) Create a cooperative structure through which WSBA members can work together to better understand Elder Law issues and effective problem solving approaches; (3) Provide legal assistance to older adults in Washington; (4) Serve as a liaison between the WSBA, BOG, Section members and other organizations serving older adults; and (5) Facilitate opportunities for research, advocacy and publications in the field of Elder Law. | |
| **Strategy to Fulfill Purpose:** | |
| The Elder Law Section: (1) hosts regular CLE programs on issues impacting older adults; (2) monitors legislation impacting older adults and shares information with members; (3) maintains an active listserv for section members to collaborate and consult on elder law issues; (4) holds monthly meetings for the executive committee that include the WSBA staff liaison | |

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| and BOG liaison; and (5) sponsors a summer intern to provide legal assistance to low-income seniors at a nonprofit legal aid organization. | |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** | |
| The Section provides legal education, advice and consultation, and legislative updates with members. The Section sponsors a legal intern to provide free legal services at a nonprofit legal services organization. | |
| **Top 2024-2025 Section Accomplishments:** | |
| Elder Law Spring CLE – May 20, 2025 – Case Law and Legislative Update, Ethics in Multi-Party Representation, Needs-Based Benefits Update, Financial Planning for Seniors, Protection Orders, Pro Bono Update | |
| Elder Law Fall CLE – September 24, 2025 – 86 attendees, great feedback – Complex Planning, Estate Litigation, Medicaid Strategies, Attorney Wellness, Continuing Care Communities, GALs and Special Representatives | |
| Monitored legislation impacting older adults, shared legislative information with members, and provided comment to the legislature when necessary | |
| Supported publication of annual Senior Bulletins on Washington Law Help | |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* | |
| **1** | **Host 2 CLEs, one in spring and one in fall** |
| **2** | **Maintain vibrant section listserv for mentorship, collaboration, and consultation** |
| **3** | **Sponsor legal intern at non-profit legal aid organization for summer 2026** |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **Monitor legislation impacting older adults and engage Section members in legislative information-sharing and comment when appropriate** |
| **2** | **Collaborate with WSBA, BOG and Washington State Bar Foundation to achieve goals** |
| **3** | Click or tap here to enter text. |
| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* | |

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| **The Section sponsors a legal intern to work with a Washington legal services organization. Internships at legal services organizations are traditionally unpaid, which means the intern must have a separate source of income or support to participate. Therefore, these internships are not available to many students and disproportionately unavailable to BIPOC students. Sponsorship by the Section opens the opportunity to all students and encourages a more diverse and inclusive pool of applicants. In addition, the Section leadership has regular discussion about strategies for making the Section open and available to all WSBA members in an effort to create a more diverse and inclusive Section.** |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions*<br>• *Involvement with Board of Governors, including assigned BOG liaison*<br>• *Ideas you have on ways WSBA can continue to strengthen/support your entity.* |
| **The Section has a good working relationship with liaisons from WSBA, BOG and Washington State Bar Foundation. Our liaisons have been very involved in Section activities and business and extremely helpful to Section leaders.** |
| **Please quantify your section's 2024-2025 member benefits:**<br><br>*For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* |

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| 2 – Spring and Fall full-day CLE's | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| 0 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 1 (Peter Greenfield Fundraiser with KCBA GELS) | Receptions/forums hosted or co-hosted |
| $34,912 in grants ($30,000 for Senior Bulletins, $4,912 for Peter Greenfield Intern) | $ amount given through donations/scholarships/grants. |
| 0 | Newsletters/publications produced |
| 0 | Mini-CLEs produced |
| 1 | New Lawyer Outreach events/benefits |
| 0 | Recognitions/Awards given |
| Many | Legislative activity (Bills reviewed, tracked, proposed) |

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| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 621 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $32335.62 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $34934.00 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 14 voting/4 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 12 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

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| **Name of Section:** | Environmental and Land Use Law |
| **Chair or Co-Chairs:** | Jason A. Foust |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Jordan Couch |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The ELUL Section is a formal association of attorneys who share a common focus and interest in the practices of environmental and land use law. Our Section represents a diverse membership with individuals, drawn from law firms, solo practice, government, private industry, and public interest groups, who often represent different sides of an issue, but who are all committed to civil and professional cooperation for the benefit, protection, and enhancement of our communities and Washington State. Accordingly, our Section aims to provide opportunities for the exchange of ideas surrounding environmental and land use law. | |
| **Strategy to Fulfill Purpose:** | |
| ELUL Section activities fulfill the Section's purpose in the following ways: (1) We host educational (CLE) events and gatherings for lawyers, law students, and professionals. We make an effort to include the presentation of differing opinions in our CLEs, so that we can | |

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| educate each other on various sides of land use or environmental issues and legal positions. Our educational events also frequently include a "view from the bench," which provides practitioners with insight into what our court and administrative judges need and wish to see to effect justice; (2) We keep our membership up-to-date about Section events and developments in our practice areas through the use of our website (blog), social media accounts (Facebook and LinkedIn), and our email ListSERV; (3) We share information about bills in the Washington Legislature that are relevant to environmental and land use law on a weekly basis during session; (4) We co-host networking events for law students and practitioners to support law students' interest in our practice areas. We also support law students with fellowship and scholarship awards. Not only does this expose students to the field, but it promotes involvement by attorneys and furthers civility and professionalism by creating an environment of inclusion and open communication; and (5) We offer social and networking events designed to support camaraderie and WSBA's professional networking needs. |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** |
| The ELUL Section furthers WSBA's mission to serve the public and members of the bar by supporting communication and collaboration between them. In practice, the ELUL Section supports this communication through our newsletter (blog) and events, which are open to anyone – members and the general public. We also provide regular email updates on legislative bills during the legislative session, which are shared as a member benefit. The ELUL Section ensures integrity of the legal profession by providing educational opportunities and opportunities for civil discourse on ethics and environmental and land use legal issues. Due to our membership's differing perspectives on the legal issues surrounding our practices areas, professionalism is essential to our Section's continued success in supporting communication and collaboration. Our educational events also frequently include a "view from the bench" to provide opportunities for the court and administrative judges to share insights with practitioners. We champion justice by our dedication to uplift law students and Section members in government and non-profit roles. This effort is clear through our fellowship grants and scholarships, which subsidize legal internships and/or attendance at our annual Mid-Year conference. |
| **Top 2024-2025 Section Accomplishments:** |
| We hosted multiple CLEs, including (1) the 2025 Mid-Year CLE which was held over two days at Alderbrook Resort, with a virtual option and sold out in person attendance (2) our first land use-focused CLE which was held in WSBA's conference room in Seattle; (3) two virtual mini-CLEs in November and December of 2024. Two more mini CLEs are currently being planned for the Fall of 2025. |
| Tracked and reported weekly to Section members on 372 legislative bills during the 2024 legislative session. |
| Held a well attended law student event that allowed prospective environmental practitioners the opportunity to meet and speak with members of the ELUL Section and the greater environmental law community. |
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| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* | |
| **1** | **Commitment to make ELUL CLEs accessible for all Section members, regardless of practice or geographic location.** |
| **2** | **Active engagement in law school outreach, provide scholarships, and provide law students with networking opportunities with experienced practitioners.** |
| **3** | **Provide timely legislative updates on all bills that affect environmental and land use practitioners.** |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **Increasing engagement among section members and increase membership of the section.** |
| **2** | **Decrease expenses and increase revenue to balance the section budget.** |
| **3** | Click or tap here to enter text. |
| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* | |
| **The ELUL Section is always pleased to support new and incoming attorneys. The Section provides law student fellowships to students working on an internship position each year. Additionally, the Section provides for scholarships funds to support attendance at our annual Mid-Year conference by attorneys working in government and non-profit jobs. Our Section is committed to including diverse topics for our CLEs—for example, our presentations included tribal law, environmental justice, and differing perspectives on land use regulations.** | |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions*<br>• *Involvement with Board of Governors, including assigned BOG liaison*<br>• *Ideas you have on ways WSBA can continue to strengthen/support your entity.* | |
| **We have communicated frequently with WSBA staff about budgeting issues and CLE planning. We include WSBA staff in our meeting and event invitations, and regularly communicate any updates for our Section. We are interested in upgrading the level of communications between the Board of Governors and the ELUL Executive Committee.** | |
| **Please quantify your section's 2024-2025 member benefits:** | |

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| *For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* | |
| 1 two day CLE seminar. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| 0 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 2 | Receptions/forums hosted or co-hosted |
| $6,339.51 ($1,339.51 for the Midyear and $5000 in student fellowships. | $ amount given through donations/scholarships/grants. |
| 0 | Newsletters/publications produced |
| 2 | Mini-CLEs produced |
| 2 | New Lawyer Outreach events/benefits |
| 0 | Recognitions/Awards given |
| 372 bills tracked and reported | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 749 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $33905.68 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $13170.37 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 13 voting/7 non-voting | **Full Size of Executive Committee (per Section bylaws)**: |

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| | | *Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:** *The number of vacant positions as of October 1, 2025 (FY26).* |
| | 5 | **Number of Applicants for FY26 open positions**: *Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

Health Law Survey
All Individual Data.p

WASHINGTON STATE BAR ASSOCIATION

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It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

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|---|---|
| **Name of Section:** | Health Law Section |
| **Chair or Co-Chairs:** | Elena Praggastis |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Emily Arneson |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| To achieve the Mission of the Section, the Section Executive Committee ("EC") shall have the following Purpose: (1) Facilitate engagement and dialogue among: attorneys, others who work in the broad field of health law, between Sections, and other groups having common interests in health law. (2) Provide regular opportunities to better understand health law through education and the exchange of information. (3) Receive and share updates on pending and proposed legislation affecting health law. (4) Promote cooperation between sections within the Association and between the Association and other groups having common interests in the health care system. (5) Provide such other services as may be of benefit to the members, the legal profession, and the public. | |
| **Strategy to Fulfill Purpose:** | |
| Provide MiniCLE & full/half-day CLE content to members and non-members; provide non-CLE educational content to law students; provide scholarship funds for students and attorneys attending health law-related conferences; provide in-person opportunities for networking; provide written | |

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| published content on a regular cadence - showcasing the work of the Section, certain legislative updates, and insights on various health law topics; explore mentorship and pro bono opportunities for our membership to participate in for future terms. |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** |
| Our content highlights high quality legal services and provides opportunities for our membership to learn more about the law, hone their skills, celebrate equity and inclusion, and explore the various facets that make up health law as a profession. |
| **Top 2024-2025 Section Accomplishments:** |
| 2025 Student Health Law Fair – a half-day program at UW School of Law, inviting students from multiple schools to learn about health law, and promote students' interest in health law generally; in-person presentations from members of the health law community to students; careers panel; networking hour for all presenters, planners, and attendees April, 2025). |
| 2025 Health Law Section Newsletter – a multipage compilation of achievements of the Section, makeup of the Executive Committee, opinions from members of the health law community on various pertinent legal issues, and fast facts about the Section and Executive Committee (currently w/ WSBA for publication). |
| 2025 Conference Scholarship – Funding provided for lodging, transportation, and tuition for two students or early practitioners to attend a health law-related conference with offered CLE credit; WSSHA Spring/Fall Conferences, or AHLA Conferences as examples (this Term applications were non-competitive we were able to offer one scholarship). |
| Mini & Half-Day CLEs – The Section put on content re: Legal Issues in Healthcare Operations (half-day, virtual, 9/25/24); What to Expect Under the New Administration in Health Care (mini, 3/11/25); The Corporate Practice of Medicine (virtual mini, 7/9/25); and a collaboration w/ the L&E Section, Health Law Meets Labor and Employment (virtual half-day, 8/27/25). |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* |

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| **1** | Continue hosting educational events of relevance to HLS members and others. |
| **2** | Host another successful Student Health Law Fair. |
| **3** | Provide additional scholarships for students/new practitioners to attend health law conferences, and continue to improve the Executive Committee's process for administering the scholarship program. |
| **4** | Host a networking/social event for members. |
| **5** | Distribute at least one newsletter/bulletin for members. |

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| **6** | Plan for a WSBA-curriculum based mentorship program for experienced attorneys to be paired with newer practitioners and law students interested in health law. |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | Continuity and competency of EC leadership. |
| **2** | Develop a regular and reputable program schedule that members can look forward to and count on each term year. |
| **3** | Explore strategies for getting in touch with our membership and surveying members to see what types of programing and other value the EC should prioritize year to year. |

**Please describe how this entity is addressing diversity, equity, and inclusion:**
*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?*

We have hosted CLE events focused on access to healthcare among diverse groups and related issues. We continue to provide a scholarship program to enable students and new practitioners to attend health law conferences, based on financial need. When recruiting for open positions and providing opportunities within the Executive Committee, our Executive Committee is intentional about maintaining diversity among participants. Representatives from our Executive Committee attended WSBA sessions related to diversity and inclusion. We had at least one representative from the Executive Committee attend at least on Board of Governors dinner to create touch points with the Board of Governors and leverage our connection to the benefit of our membership.

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**
*For example:*

- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

Carolyn MacGregor is an amazing staff liaison! She provides a great deal of value to our regular EC meetings and we enjoy working with her. Emily Arneson attended our regular EC meetings and consistently provided timely, succinct, and helpful summaries of various BOG issues and happenings. One thing that may be helpful is to have one assigned BOG liaison for multiple terms/years, because by the time the year is ended and we've developed a good rapport with our liaison, it seems it is already time to meet someone new. Tech support and general WSBA support for CLE events was VERY helpful and comprehensive. We continue to be frustrated by issues related to our section listserv and how best to connect with our membership.

**Please quantify your section's 2024-2025 member benefits:**

*For example:*

- *$3000 Scholarships, donations, grants awarded;*

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| • *4 mini-CLEs produced* | |
| 1 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| 1 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 1 | Receptions/forums hosted or co-hosted |
| $1,250 | $ amount given through donations/scholarships/grants. |
| 0 (we have one w/ WSBA near publishing that we've worked on this Term) | Newsletters/publications produced |
| 2 | Mini-CLEs produced |
| 1 | New Lawyer Outreach events/benefits |
| 1 | Recognitions/Awards given |
| 0 | Legislative activity (Bills reviewed, tracked, proposed) |
| 0 | Other (please describe): |
| 0 | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 393 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $9697.95 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | 9391.24 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 8 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |

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| | 1 | **Number of Vacancies for FY26:** *The number of vacant positions as of October 1, 2025 (FY26).* |
| | 9 | **Number of Applicants for FY26 open positions**: *Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

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It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

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|---|---|
| **Name of Section:** | Indian Law Section |
| **Chair or Co-Chairs:** | Andrew T. Pollom |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Christopher Bhang |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The Indian Law Section's purpose is to seek the participation of all interested members of the Bar, and of county and local bar associations, in order to benefit such members, their clients, and the general public. | |
| **Strategy to Fulfill Purpose:** | |
| (a) By providing the opportunity for exchange of ideas in the area of Indian law; to further the development of this area of the law; to communicate useful information pertaining to Indian law to members of the Bar; and to improve the application of justice in this field, all in conformity with the Bylaws of the Bar; (b) By initiating and implementing common projects; (c) By review of pending legislation and development of proposed statutory enactments to improve and to facilitate the administration of justice within the Section's area of interest; (d) By undertaking such other service as may be of benefit to the members, the legal profession and the public. | |

| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** |
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| The ILS works each year to ensure that members interested in Indian law have opportunities to further their knowledge and network together. Indigenous communities are often underserved, so championing justice is at the core of every Indian law attorney's work. ILS allows those attorneys to network together and learn for the purpose of serving those communities |
| **Top 2024-2025 Section Accomplishments:** |
| The Section held its 37th Annual Indian Law CLE in May in partnership with the Tulalip Tribes of Washington and Stokes Lawrence LLP. This year was the first time the CLE was held outside of Seattle and in partnership with a local Native Nation. This continues to generate a great amount of revenue for the section, which allows the section to provide scholarships and other services to the greater Indian Law community. |
| The Section provided financial assistance to Native American Law Student Association (NALSA) groups at Seattle University School of Law, University of Washington School of Law, Gonzaga School of Law, the Northwest Indian College, and to the SU and UW scholarship funds. Funds were utilized for attendance at Moot Court competitions and scholarships for members. The Section also sponsored a table at the UW NALSA Salmon Bingo Dinner and the UW Law annual symposium. |
| In April 2025, the Indian Law Newsletter was published for the first time in five years. |
| In December 2024, the Section hosted the first holiday reception since the COVID pandemic. |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* |

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|---|---|
| **1** | Host the 38th Annual CLE |
| **2** | Click or tap here to enter text. |
| **3** | Click or tap here to enter text. |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | Sponsor meet and greets for section members and law students |
| **2** | Sponsor opportunities to connect section members with native college students interested in law school |
| **3** | Sponsor meet and greets for section members and law students |

**Please describe how this entity is addressing diversity, equity, and inclusion:**
*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?*

Diversity is part and parcel of the ILS mission. Native Attorneys are often drawn to Indian law and frequently take leadership roles in the Section. For instance, the 2021-2023 Chair and Chair-Elect were both members of a tribe and approximately five at-large members are also Tribal members. The ILS welcomes members of other under-represented groups as well.

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**
*For example:*
- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

Our WSBA staff liaison continues to be instrumental in our Section's success. Attendance at meetings was reliable and communication was excellent. We are well-supported by this staff member. Our contact with the Board of Governor's Liaison has improved since prior year but we think attendance to at least a few meetings annually might be useful. WSBA has significantly improved its consultation with the ILS and we appreciate being included in conversations that are about Indian Law. We hope this will continue for the benefit of all.

**Please quantify your section's 2024-2025 member benefits:**

*For example:*
- *$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

| | |
|---|---|
| 0 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| 1 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 1 | Receptions/forums hosted or co-hosted |
| $50,0000 | $ amount given through donations/scholarships/grants. |
| 1 | Newsletters/publications produced |
| 0 | Mini-CLEs produced |
| 0 | New Lawyer Outreach events/benefits |
| 0 | Recognitions/Awards given |

| | |
|---|---|
| | |
| 0 | Legislative activity (Bills reviewed, tracked, proposed) |
| 0 | Other (please describe): |
| 0 | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 364 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $22677.43 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $51335.02 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 12 voting/1 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 3 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | International Practice Section |
| **Chair or Co-Chairs:** | David Freeburg |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Kristina Larry |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The International Practice Section has a broad focus that includes not only the study of current developments in the field of international law but also immigration law, international transactional work, aerospace, taxation, intellectual property, financing, services, trade regulation, exports and imports, transnational contracts, travel, and international dispute resolution. Members represent a wide variety of backgrounds and practices, including full-time and part-time practitioners, government, business, foreign lawyers, academia, internationally-focused law students, and those simply intellectually interested. | |
| **Strategy to Fulfill Purpose:** | |
| The Section provides benefits to members by engaging in CLEs and related educational activities. The Section develops contacts and communicates with WSBA members, foreign lawyers, scholars, law students, and the public through the section listserv, email and other means. The Section fosters | |

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| mentorship through its mentorship program, which pairs members with law students and foreign lawyers. The Section also initiates, sponsors, and promotes within the WSBA, court rules and legislation regarding international practice issues as appropriate, and serves as a representative of the WSBA, subject to appropriate authorization, on international practice issues. |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** |
| We help our members strengthen their representation of clients involved in the international practice of law |
| **Top 2024-2025 Section Accomplishments:** |
| We produced 4 mini-CLEs |
| We co-sponsored an in-person annual general meeting at the U.S. District Courthouse for W.D. Wash. |
| We provided $5,000 in scholarships to 2 Huneke Fellows |
| Click or tap here to enter text. |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* |

| | |
|---|---|
| **1** | **Increase the number and size our Huneke fellowship awards** |
| **2** | **Double the number of our mini-CLEs** |
| **3** | **Return to 2 in person events per year** |

| | |
|---|---|
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | Click or tap here to enter text. |
| **2** | Click or tap here to enter text. |
| **3** | Click or tap here to enter text. |

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|---|
| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* |
| **We deliberately seek out diverse leaders to serve our international clients and the public** |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions* |

| |
|---|
| • *Involvement with Board of Governors, including assigned BOG liaison*<br>• *Ideas you have on ways WSBA can continue to strengthen/support your entity.* |
| We are lucky to have the assistance of Carolyn MacGregor |
| **Please quantify your section's 2024-2025 member benefits:**<br><br>*For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* |

| | |
|---|---|
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 1 | Receptions/forums hosted or co-hosted |
| $5,000 | $ amount given through donations/scholarships/grants. |
| Click or tap here to enter text. | Newsletters/publications produced |
| 4 | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| 2 Huneke Fellowships | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

**SECTION DATA**
***To Be Completed by WSBA Sections Team***

| | | |
|---|---|---|
| **Section Membership Information:** | 217 | **Membership Size**: *As of September 30, 2025.* |
| | $8189.27 | **FY25 Revenue ($):** *As of September 30, 2025.* |
| | $2724.00 | **FY25 Direct Expenses ($)** |

| | | |
|---|---|---|
| | | *As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 14 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 9 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | WSBA IP Section |
| **Chair or Co-Chairs:** | Connie WAN |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Alain Villeneuve |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| To promote the practice of Intellectual Property Law. | |
| **Strategy to Fulfill Purpose:** | |
| To support the practitioners and communities with educational programs and pro bono support | |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** | |
| Member outreach, community outreach, and hosting CLEs | |
| **Top 2024-2025 Section Accomplishments:** | |
| Hosted 4 CLEs including free CLEs to section members | |

| | |
|---|---|
| Gave 3 $5,000 scholarships to law students from each of WA law schools | |
| Supported patent pro bono program hosted at the SU law school through $5 donation | |
| Click or tap here to enter text. | |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* | |
| **1** | Plan and present 4 CLEs |
| **2** | Work with law schools to give another 3 scholarships |
| **3** | Work with Seattle U. law school to continue the support to WA state patent pro bono program |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | Expand IP section membership through CLE programs including free CLE offers to the members |
| **2** | More community outreach by working with patent pro bono program |
| **3** | Click or tap here to enter text. |
| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* | |
| Click or tap here to enter text. | |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions*<br>• *Involvement with Board of Governors, including assigned BOG liaison*<br>• *Ideas you have on ways WSBA can continue to strengthen/support your entity.* | |
| Click or tap here to enter text. | |
| **Please quantify your section's 2024-2025 member benefits:**<br><br>*For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* | |
| 4 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |

| | |
|---|---|
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 1 | Receptions/forums hosted or co-hosted |
| 20000 | $ amount given through donations/scholarships/grants. |
| Click or tap here to enter text. | Newsletters/publications produced |
| 3 | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| 6 | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

**SECTION DATA**
***To Be Completed by WSBA Sections Team***

| | | |
|---|---|---|
| **Section Membership Information:** | 764 | **Membership Size**: *As of September 30, 2025.* |
| | $23052.16 | **FY25 Revenue ($):** *As of September 30, 2025.* |
| | 20224.00 | **FY25 Direct Expenses ($)** *As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 9 voting/1 non-voting | **Full Size of Executive Committee (per Section bylaws)**: *Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:** *The number of vacant positions as of October 1, 2025 (FY26).* |

| | | |
|---|---|---|
| | 5 | **Number of Applicants for FY26 open positions**: *Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Juvenile Law Section |
| **Chair or Co-Chairs:** | Bailey Zydek |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Kari Petrasek |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The Section will provide a forum to discuss issues of concern and act as an agent of change to improve the law and practice related to civil and criminal matters involving children and youth in Washington State. This Section welcomes advocates from all interested disciplines and a variety of fields of law, including juvenile justice, child welfare and those who represent youth in civil legal practice. The Section is concerned with all aspects of juvenile law and policy: dependency, offender, civil legal needs of youth and status offenses (children in need of services, youth at risk, and truants). | |
| **Strategy to Fulfill Purpose:** | |
| The Juvenile Law Section provides an opportunity for legal professionals who work with juveniles and their families in child welfare and juvenile justice to meet together and work collaboratively on issues facing their clients. The Section acts as an agent of change to improve the law and practice related to civil and criminal matters involving children and youth in Washington state. | |

| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** |
|---|
| The Juvenile Law Section is primarily concerned with providing community, education, collaboration, and support around areas of legal practice for indigent and underrepresented clients and families, including in practice areas such as child welfare, juvenile justice, status offenses, immigration as it relates to children and families, truancy, at-risk youth and children in need of services proceedings, as well as a variety of civil legal needs of youth. |
| **Top 2024-2025 Section Accomplishments:** |
| The JLS sponsored and held five mini-CLEs over the past year: 1) Evidence with Judge Michael Schwartz on 3/7/2025; 2) Child Development and the Impact of Trauma on the Brain on 5/9/2025; 3) DDA Intake, Eligibility, and Services, and Cross-Systems work with DCYF on 6/11/2025; 4) Building a More Equitable Profession – A Moral Imperative on 6/20/2025; 5) An Overview of Special Education in Washington State on 7/11/2025. The mini-CLEs were well-attended and provided a variety of topics for members and non-members. |
| The JLS put on, and/or participated in, outreach events to Seattle University School of Law and Gonzaga University Law School to encourage law student participation in the JLS. The events included the participation and planning by the JLS's Young Lawyer Liaison and the JLS's Treasurer. The events were also attended by other lawyers practicing in the child welfare field. As a result of these events, two law students joined the JLS and became the new law student representatives. |
| As a result of its outreach efforts (including its mini-CLEs, outreach to law schools, and scholarship opportunities), the JLS grew its memberships by approximately 50% during FY 2025. |
| The JLS amended its by-laws to stagger the terms of the Executive Committee officers. In odd numbered years, the JLS will vote for the Chair, Chair-elect, Secretary, Treasurer, one officer of each committee (Juvenile Justice, Dependency and Child Welfare, Civil Legal Needs, and Legislative), one At-Large member, and the Young Lawyer Liaison. In even numbered years, the JLS will vote for one officer of each committee, the CLE Coordinator/Publication Editor, and one At-Large member. The purpose of staggering the terms is to promote consistency in the Executive Committee and to ensure there are always officers with experience with the section during elections, which can be an unstable time. |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* |

| | |
|---|---|
| **1** | The JLS will hold monthly or bi-monthly mini-CLEs or CLEs, free to JLS membership and open to other Sections and general WSBA members, on topics relevant to the JLS (including juvenile law, dependency law, juvenile justice, civil legal needs, and race/equity/disproportionality in the juvenile justice legal space). |
| **2** | The JLS will finish its update of the JLS website. Tasks include publishing the membership directory, creating a "members only" section, moving content to appropriate parts of the website, ensuring JLS website links are correct, and updating the website. |

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| **3** | The JLS's law student representatives will use JLS resources to table at Seattle University to generate interest in the section. The law student representatives may use those resources to purchase items such as a banner, sweatshirts that advertise the section, and other promotional materials. The JLS will also hold events at the Washington State law schools to generate interest in jobs related to juvenile work and recruit members for the section. |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | The JLS will increase scholarship opportunities to provide section members specific opportunities and funding to attend trainings and CLEs relevant to the JLS. The scholarship opportunities will be relevant, attractive to JLS members, and will provide JLS members the opportunity to expand their knowledge or experience concerning issues relevant to the JLS. |
| **2** | The JLS will work to actively collaborate with other WSBA sections in planning and producing mini-CLEs and CLEs, as well as other projects that are relevant to the JLS purpose. Those sections could include the Civil Rights Law section, the Criminal Law section, the Family Law section, the Indian Law section, the LGBTQ+ Law section, the Low Bono section, the Solo and Small Practice section, and other sections. |
| **3** | The JLS will deepen its understanding of, and focus on, inclusivity, equity, and anti-racist legal practice. This will include in its selection of scholarship topics and in the planning and production of mini-CLEs and CLEs that address the disproportionate treatment and outcomes for Black, brown, Native American, and other impacted populations in the juvenile legal system. The JLS will also actively recruit practitioners who are historically underrepresented in the legal profession. |
| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* | |
| The section meetings include Diversity/Equity/Inclusion at the beginning of every agenda; in this way, we are working to ensure we are always keeping issues of disproportionality at the front and center of our practice. We held a CLE focused on equity in practice: "Building a More Equitable Profession – A Moral Imperative." We also offered two scholarships to conferences focused on disproportionately-represented populations in the system: a scholarship to attend the National Indian Child Welfare Act Protecting Our Children Conference virtually, and a scholarship to attend the National Association for Public Defense Racial Justice Conference in person. | |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions*<br>• *Involvement with Board of Governors, including assigned BOG liaison*<br>• *Ideas you have on ways WSBA can continue to strengthen/support your entity.* | |
| Our BOG liaison (now president-elect of the BOG) attends almost every meeting and provides exceptional support. Our staff section liaison also regularly attends section meetings and has always | |

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|---|---|
| been able to answer any question we have. We have greatly appreciated her dedication and support of our section. | |
| **Please quantify your section's 2024-2025 member benefits:**<br><br>*For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* | |
| | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| Click or tap here to enter text. | Receptions/forums hosted or co-hosted |
| Click or tap here to enter text. | $ amount given through donations/scholarships/grants. |
| Click or tap here to enter text. | Newsletters/publications produced |
| 5 mini-CLEs produced | Mini-CLEs produced |
| 2 New Lawyer Outreach events/benefits | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |
| Reviewed, tracked, and made recommendations to the JLS on at least 30 bills | Legislative activity (Bills reviewed, tracked, proposed) |
| Amendment of JLS by-laws related to Executive Committee officer elections | Other (please describe): Organization/structure change |
| Scholarship to National Indian Child Welfare Annual Protecting Our Children Conference, $99 Award Pending | Other (please describe): Scholarship offer |
| Scholarship offered to National Association for Public Defense Racial Justice Conference (no scholarship applicants) | Other (please describe): Scholarship offer |
| Creation of Member Directory, pending publication to JLS website | Other (please describe): Publication created; publication pending |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 223 | **Membership Size**: |

| | | |
|---|---|---|
| | | *As of September 30, 2025.* |
| | $14892.82 | **FY25 Revenue ($):** *As of September 30, 2025.* |
| | 1750.87 | **FY25 Direct Expenses ($)** *As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 16 voting/2 non-voting | **Full Size of Executive Committee (per Section bylaws)**: *Include and specify voting and non-voting positions.* |
| | 3 | **Number of Vacancies for FY26:** *The number of vacant positions as of October 1, 2025 (FY26).* |
| | 10 | **Number of Applicants for FY26 open positions**: *Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE
BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

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It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | LEGAL ASSISTANCE TO MILITARY PERSONNEL (LAMP) |
| **Chair or Co-Chairs:** | Chair: Stephen Carpenter, Past Chair: Paul Apple |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Christopher Bhang |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| LAMP addresses matters related to the rendition of appropriate and efficient legal service to members of the armed forces of the United States. | |
| **Strategy to Fulfill Purpose:** | |
| Promoting the objectives of the WSBA with respect to military affairs.<br>Establishing liaison between the WSBA, the Armed Forces of the United States, and federal, state, and local government agencies involved in military and veteran affairs to better serve the legal needs of the servicemembers and their dependents. Providing information to licensed legal professionals, both active duty and reserve. Encouraging continuing legal education to foster the ability to provide legal representation to military personnel, veterans and their dependents within the state of Washington | |

| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** | |
|---|---|
| Washington State is home to a large military community that is continually seeking legal guidance on significant assortment of legal issues. This community is composed of Veterans, Active Duty and Reserve Servicemembers and their dependents. | |
| **Top 2024-2025 Section Accomplishments:** | |
| Published articles on military areas of interest termed, "Chair`s Corner" | |
| Held Mini-CLE on Haditha Investigation (1.0 approved credit) | |
| Paul Apple Attended Charity Event for Veterans in Eastern Washington | |
| Click or tap here to enter text. | |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* | |
| **1** | Increase our membership and CLE participation |
| **2** | Click or tap here to enter text. |
| **3** | Click or tap here to enter text. |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | Partner with the ATG Military Liaison office to connect other organizations to the community with Legal Help in the form of: Pro Bono Volunteers, Legal Aid Programs, Self-help Materials, Programs in Other States. |
| **2** | Click or tap here to enter text. |
| **3** | Click or tap here to enter text. |
| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* | |
| Click or tap here to enter text. | |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions*<br>• *Involvement with Board of Governors, including assigned BOG liaison*<br>• *Ideas you have on ways WSBA can continue to strengthen/support your entity.* | |

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|---|---|
| Click or tap here to enter text. | |
| **Please quantify your section's 2024-2025 member benefits:**<br><br>*For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* | |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| Click or tap here to enter text. | Receptions/forums hosted or co-hosted |
| Click or tap here to enter text. | $ amount given through donations/scholarships/grants. |
| Click or tap here to enter text. | Newsletters/publications produced |
| Click or tap here to enter text. | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 60 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $2140.09 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $776.57 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |

| | | |
|---|---|---|
| **Section Executive Committee Information:** | 6 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 3 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Cannabis, Liquor and Psychedelics |
| **Chair or Co-Chairs:** | Fabiola Jimenez |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Allison Widney |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The purpose of the Section is to support legal professionals with a shared interest in cannabis, psychedelics, and liquor law by providing continuing legal and other education, fostering professional connections, and creating opportunities for collaboration. The Section also aims to serve as a resource for students exploring these rapidly evolving areas of law while also supporting attorneys practicing in these areas. Through educational programming, networking opportunities, and open forums for discussion, the Section encourages the exchange of ideas and engagement on issues of mutual interest. Additionally, the Section offers guidance to the Bar on proposed legislation, court rules, and other relevant matters, and provides educational resources to | |

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| legislators and regulators. Ultimately, the Section is committed to delivering services that benefit both the public and the legal profession |
| **Strategy to Fulfill Purpose:** |
| To fulfill its purpose, the Section's will implement a comprehensive strategy should focused on education, engagement, advocacy, and service. This includes organizing CLEs and webinars tailored to developments in cannabis, psychedelics, and liquor law; fostering networking opportunities through conferences and networking events to connect legal professional; and collaborate with law schools to engage students and emerging practitioners. It will establish working groups or committees to monitor and respond to legislative and regulatory developments, providing timely input to the Bar and policymakers. By staying responsive to emerging trends and community needs, the Section will ensure its initiatives continue to benefit both the legal profession and the public. |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** |
| The Section's purpose directly supports the WSBA's mission by equipping legal professionals with the education, resources, and community needed to uphold the integrity of the legal profession and champion justice in emerging and evolving areas of law. |
| **Top 2024-2025 Section Accomplishments:** |
| Click or tap here to enter text. |
| Click or tap here to enter text. |
| Click or tap here to enter text. |
| Click or tap here to enter text. |

| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* | |
|---|---|
| **1** | Increase membership to a minimum of 75 |
| **2** | Update Webpage Content: By the end of Q1 2026, update the Section's WSBA webpage to reflect current leadership, mission, resources and upcoming events. |
| **3** | Establish working groups/committee to actively engage Section members and streamline the sharing of information, resources and opportunities within the group. |

| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
|---|---|
| **1** | Launch Public Education Hub: Develop a public-facing legal education hub on the Section's website by Q4 2026, including quarterly webinars or publications. |
| **2** | Build Strategic Partnerships: Establish at least 3 formal partnerships with law schools, community organizations, or other WSBA sections by the end of 2026 to support interdisciplinary collaboration. |
| **3** | Track Emerging Trends: Implement an annual member survey starting in 2026 to identify emerging legal trends and use the data to guide programming and outreach. |

**Please describe how this entity is addressing diversity, equity, and inclusion:**
*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?*

The Section is committed to diversity, equity, and inclusion by intentionally seeking input from members with diverse backgrounds, practice areas, and geographic locations. We foster an inclusive culture through open dialogue, shared leadership opportunities, and transparent decision-making.

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**
*For example:*
- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

**Support staff has been nothing but wonderful and helpful!**

**Please quantify your section's 2024-2025 member benefits:**

*For example:*
- *$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

| | |
|---|---|
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| Click or tap here to enter text. | Receptions/forums hosted or co-hosted |
| Click or tap here to enter text. | $ amount given through donations/scholarships/grants. |

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|---|---|
| Click or tap here to enter text. | Newsletters/publications produced |
| Click or tap here to enter text. | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 67 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $1696.51 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $0 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 10 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 3 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 0 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Labor and Employment Law |
| **Chair or Co-Chairs:** | Sarah Spierling Mack |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Christopher Bhang |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The purpose of the Section shall be to seek the participation of all members of the Bar interested in labor and employment law, including plaintiff's and defense counsel from both the public and private sectors, to benefit such members, their clients, and the general public. | |
| **Strategy to Fulfill Purpose:** | |
| (A) By providing a forum for members to exchange ideas in all areas of labor and employment law. (B) By establishing an annual CLE conference and multiple smaller CLEs. (C) By providing grants to law students interested in labor and employment law. (D) By undertaking such other services as may be of benefit to the members, the legal profession, and the public. | |

| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** | |
|---|---|
| The Section coordinates events that keep practitioners informed on the latest developments in labor and employment law, which promotes competency and ethical practice in the Bar. | |
| **Top 2024-2025 Section Accomplishments:** | |
| We planned, executed and hosted our 24th Annual Labor and Employment CLE, a full day CLE event, in November of 2024. | |
| We hosted two mini CLEs. The first was about the gig economy and the second was a joint CLE with the Health Law Section, in which we contributed three topics involving employment issues in health-related settings. | |
| We provided a summer grant to a local law student from Gonzaga University, who spent their summer working in otherwise unpaid L&E positions. | |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* | |
| **1** | Host 3-4 mini CLEs, and 1 full day CLE conference |
| **2** | Provide 2-3 summer grants to law students |
| **3** | Create new position, such as social media/communication coordinator, for New Member Liaison to increase involvement on Committee |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | Increase activity on Section listserv, maybe seek dedicated social media volunteer. |
| **2** | Plan alternatives for Annual CLE conference to decrease costs and increase revenue |
| **3** | Click or tap here to enter text. |
| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* | |
| One of the Section's primary focuses in the 2024-2025 fiscal year was to increase diversity on the Executive Committee, particularly with respect to an increase in representation by attorneys outside of the Seattle metro area. We have been accomplishing that goal with members representing the east and southwest regions of the State. In addition, , in all of our activities, is to increase diversity of | |

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| membership and CLE speakers. We strive to provide speaking and other leadership and development opportunities to those from historically underrepresented backgrounds. The Section also continues to strive to increase access to member benefits and programs for lawyers of moderate means and in the central and eastern parts of the State. |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions*<br>• *Involvement with Board of Governors, including assigned BOG liaison*<br>• *Ideas you have on ways WSBA can continue to strengthen/support your entity.* |
| Click or tap here to enter text. |
| **Please quantify your section's 2024-2025 member benefits:**<br><br>*For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* |

| | |
|---|---|
| Sponsored mini CLE on gig economy | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Co-sponsored mini CLE with Health Law Section | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| Produced and sponsored full-day annual CLE | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| $7500 granted to summer law school grantee | $ amount given through donations/scholarships/grants. |
| Click or tap here to enter text. | Newsletters/publications produced |
| 2 | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| SECTION DATA<br>*To Be Completed by WSBA Sections Team* | | |
|---|---|---|
| **Section Membership Information:** | 978 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $45550.52 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $16395.33 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 18 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 4 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | LGBTQ+ Section |
| **Chair or Co-Chairs:** | Adriena Clifton |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Alain Villeneuve |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The Lesbian, Gay, Bisexual, and Transgender Law Section strives to support understanding among WSBA members of the legal needs of lesbian, gay, bisexual, and transgender residents of Washington, assist LGBT residents and those who represent them, better understand how their legal needs can be met, support research, education and collaboration by section members on issues of sexual orientation and gender identification. Promote the study of LGBTQ+ law and report on changing law and regulations as they affect LGBT people and communities, assist in legislative work and act as a liaison between the WSBA its Board of Governors, LGBTQ+ Organizations, and the public. | |
| **Strategy to Fulfill Purpose:** | |
| The Section fulfills this purpose through direct community engagement opportunities,including social and networking opportunities for members. The Section also provides at least SectionsOctober 1, 2023 – September 30, 2024 (FY24)one CLE for WSBA members each year. The Section has also | |

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| worked with other community focused organizations to promote collaboration on social and networking events. |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** |
| The Section's involvement in research and presentation on changing areas of LGBTQ+-specific law promotes continuing knowledge development/sharing and community-specific competence within the legal community – thereby promoting ethical and professional practice, which has an immediate effect on justice for the community and community members as litigants, educators, counsel, judges, and members of the profession generally. The Section further promotes respect and civility within the legal community and between judges, lawyers, staff, and clients. The Section's educational programming includes discussions of best practices to ensure we are meeting the needs of all LGBTQ+ Washingtonians, including addressing implicit and explicit bias and homophobic and transphobic behavior and language in the courtroom. In addition, at our annual meeting each year we strive to discuss issues of professionalism that members may have come in contact with over the past year, ensuring that we are consistently serving our members' needs and addressing membership concerns. We also devote a significant portion of our educational programming to address respectful and inclusive language that further promotes the overall integrity and inclusivity of the profession |
| **Top 2024-2025 Section Accomplishments:** |
| Name Change and Estate Planning CLE |
| Mocktail Mixer |
| Digital Privacy CLE |
| LGBTQ+ Social |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* |

| | |
|---|---|
| **1** | **Host more mini CLES** |
| **2** | **Host more socials** |
| **3** | **Host a drag show in partnership with UW or SU Law** |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **Boost membership** |
| **2** | **Forge connections with QLaw Association** |
| **3** | **Continue to establish relationships with law schools** |

**Please describe how this entity is addressing diversity, equity, and inclusion:**
*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?*

**The Section is focused on serving lawyers and legal professionals who serve the LGBTQ+ community, which in itself is a very diverse community comprising individuals and families from various racial, ethnic, religious, national origin, gender, and socioeconomic backgrounds. Our efforts over the past year continued to focus on better serving Section members outside the Seattle area, as well as those in Seattle. We continue to encourage members of the WSBA of all backgrounds to consider joining our section, as well as our section's Executive Committee!**

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**
*For example:*
- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

5271.46 The monthly Section meetings have included informative updates on broader issues facing the WSBA, as well as the potential impact of these issues on the Section membership, as well as the legal profession within Washington and have helped to ensure that Section members are aware of opportunities to get involved. We look forward to further working with both of our BOG Liaisons and the WSBA staff and Staff Liaison over the coming year.

**Please quantify your section's 2024-2025 member benefits:**

*For example:*
- *$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

| | |
|---|---|
| $5271.46 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| $1497.24 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 2 | Receptions/forums hosted or co-hosted |
| Click or tap here to enter text. | $ amount given through donations/scholarships/grants. |
| Click or tap here to enter text. | Newsletters/publications produced |
| 2 | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |

| | |
|---|---|
| Click or tap here to enter text. | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 125 | **Membership Size**:<br>*As of September 30, 2025.* |
| | Click or tap here to enter text. | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | Click or tap here to enter text. | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 10 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 4 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 4 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

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It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Litigation Section |
| **Chair or Co-Chairs:** | Tiffany Wilke |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Allison Widney |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The purpose of the Section shall be to seek the participation of all interested members of the Bar, and of state and local bar associations, in order to benefit such members, their clients and the general public: a. b. c. d. e. 1.3 Limitations By providing the opportunity and forum for the interchange of ideas in the areas at trial advocacy, practice and procedure; By initiating and implementing common projects within said areas; By review of pending legislation and development of proposed statutory enactments to improve and facilitate the administration of justice; By assisting the courts in establishing rules and methods for the more certain and expeditious administration of justice; and By undertaking such other services as may be of benefit to the members, the legal profession and the public. | |
| **Strategy to Fulfill Purpose:** | |

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| By conducting CLEs, encouraging mentor/mentee relationships, and hosting "litigation events" to encourage member participation. | |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** | |
| The Litigation Section is focused on providing access to the justice system by way of education through CLEs, and access through mentor/mentee relationships. | |
| **Top 2024-2025 Section Accomplishments:** | |
| Scholarships to all three WA law schools | |
| Yearly judicial dinner with the WA Supreme Court | |
| Hosted CLEs | |
| Hosted "fireside chat" with the Hon. Michelle Peterson | |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* | |
| **1** | Resume mentor/mentee program with our mentors – goal is to encourage participation and place 1-3 mentees with mentors in our section. This is likely to be a goal that will last throughout all of 2025-2026. |
| **2** | Another CLE for members and non-members alike which will involve speakers from both our section and from other firms and groups – this will likely take place virtually by October 2026. |
| **3** | Plans for another 2026 judicial event with a judicial speaker for networking. Ideally, this will occur by summer 2026. |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| 1 | More engagement with our members and beyond by way of LinkedIn updates and social media. |
| **2** | A focus on generating revenue by way of CLEs. |
| **3** | Reviving the mentor/mentee programs. |
| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* | |

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|---|
| Our section is comprised of a wide variety of demographics in the legal profession (gender, race, practice areas, ages) and we encourage active participation amongst all groups to host, engage, and otherwise lead section-related events. |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions*<br>• *Involvement with Board of Governors, including assigned BOG liaison*<br>• *Ideas you have on ways WSBA can continue to strengthen/support your entity.* |
| We really appreciate WSBA staff attending our meetings! You all are a great help when it comes to knowing specific bylaws and rules that we must abide by, which helps us plan our events and boost our engagement. |
| **Please quantify your section's 2024-2025 member benefits:**<br><br>*For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* |

| | |
|---|---|
| Full-day CLE (September 2025) | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| Judicial networking event with Hon. Michelle Peterson; Judicial Dinner with WA Supreme Court | Receptions/forums hosted or co-hosted |
| Law school scholarships totaling $6,000 | $ amount given through donations/scholarships/grants. |
| WSBA Litigation Section Quarterly Newsletter | Newsletters/publications produced |
| Click or tap here to enter text. | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| SECTION DATA<br>*To Be Completed by WSBA Sections Team* | | |
|---|---|---|
| **Section Membership Information:** | 982 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $29070.64 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $6112.00 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 11 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 1 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 5 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Low Bono |
| **Chair or Co-Chairs:** | Jaymi Trimble |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Kevin Fay |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The underlying purpose of "low bono" is to increase the availability of legal representation and legal services to clients of moderate means. Clients of moderate means are individuals who have a need or a want for legal representation or legal services, but who cannot qualify or pro bono legal assistance and who typically cannot afford the cost of traditional law firm representation or legal services. These individuals comprise the majority of those seeking resolution of, or planning for, legal issues and legal matters. The Low Bono Section is a community of lawyers, LLLTs, other legal professionals, and law students committed to identifying solutions, creating systems, and developing projects to increase the overall availability and affordability of legal representation and legal services. | |
| **Strategy to Fulfill Purpose:** | |
| See Bylaws 2.1 Developing and providing resources for members, regardless of field or area of practice, who are dedicated and committed to providing low bono legal services, defined as legal and | |

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| law-related services provided with the intent to increase accessibility of legal services for people of moderate financial means. 2.2 Providing a forum and opportunity for education, training, and sharing of forms, practice tips, client counseling techniques, alternative forms of conflict resolution, and other resources to and among members of the Section. 2.3 Developing "best practices" and "alternative practices" for providing competent, current, efficient, and economical professional services while being mindful of the clients' moderate means. |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** |
| The Low Bono Section provides a forum and opportunity for education, training, sharing of forms, practice tips, client counseling techniques, and alternative techniques for conflict resolution. The section provides its members with free mentorship opportunities, discounted admission to low-bono-oriented CLEs, networking and referral opportunities with other low bono professionals, leadership development opportunities, and more. |
| **Top 2024-2025 Section Accomplishments:** |
| Increased membership levels surpassing last year. |
| Participated in numerous legislative bills affecting section members. |
| Significantly expanded social media and actively posted about the section and related events. |
| Offered several CLEs of interest to members and non-members. |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* |

| | |
|---|---|
| **1** | **Increase Membership by targeting legal practitioners through content-rich CLEs and partnership events. The section is considering awards for the legal practitioners that offer the most low-bono assistance. Track progress quarterly to gauge membership growth. Developing a list of low-bono practitioners.** |
| **2** | **Host content-rich, CLEs that provide benefit to section members and encourage non-members to join the section.** |
| **3** | **Actively participate in the review of legislative bills affecting family law and the low-bono community.** |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **Develop a list of low bono professionals.** |
| **2** | **Consider an award for the low bono legal practitioner(s) of the year.** |
| **3** | **Continue to advocate for legislative change.** |

**Please describe how this entity is addressing diversity, equity, and inclusion:**
*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?*

**Our Executive Committee remains committed to fostering participation from a diverse group of individuals. All meetings are accessible remotely, with meeting details published in advance to ensure broad participation. To accommodate members with varying schedules, including those with small children, Executive Committee meetings are held later in the day, typically on the second Wednesday of each month. We also continue to host virtual and in-person socials after these meetings, inviting all Section Members to attend both the meetings and the post-meeting gatherings.**

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**
*For example:*
- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

**The Low Bono Section receives excellent support from WSBA staff.**

**Please quantify your section's 2024-2025 member benefits:**

*For example:*
- *$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

| | |
|---|---|
| 0 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| 0 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 0 | Receptions/forums hosted or co-hosted |
| 0 | $ amount given through donations/scholarships/grants. |
| 0 | Newsletters/publications produced |
| 9 | Mini-CLEs produced |
| 0 | New Lawyer Outreach events/benefits |
| 10 | Recognitions/Awards given |

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| 25 | Legislative activity (Bills reviewed, tracked, proposed) |
| 0 | Other (please describe): |
| 0 | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 128 | **Membership Size**:<br>*As of September 30, 2025.* |
| | 10082.85 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | 4253.09 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | Up to 13 Voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 1 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 6 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Real Property, Probate & Trust |
| **Chair or Co-Chairs:** | Nathan Smith |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Matthew Dresden |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The purpose of the Section is to: (a) Assist our members in achieving the highest standards of competence, professionalism, and ethics in their practices,(b) Assist the Legislature in the enactment and improvement of the laws affecting real property, probate, trusts, and estates and to assist the Judiciary in the just administration of those laws, (c) Support the WSBA with regard to those matters which concern the practice of law in the areas of real property, probate, trusts and estates, and (d) Otherwise serve our members by helping them realize their professional goals. | |
| **Strategy to Fulfill Purpose:** | |
| For FY 2024-2025, the RPPT Section will continue to work with the WSBA to engage and educate members and lawyers in general with high quality online CLEs and an in-person Mid-Year meeting, continue to prepare timely newsletters and provide a listserv and other opportunities for members and lawyers in the community to get involved with education and the general improvement of the | |

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| practice of our areas of law. The Section will further engage with newer members of the Section to advance their practices and encourage their participation in Section activities. The Section will continue to work closely with legislative leaders, the Section's legislative subcommittee and executive committee to ensure that the laws affecting real property, probate, trusts and estate continue to evolve with the practice and provide a good framework for practitioners and meet the needs of the state's general population. |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** |
| The Section provides opportunities for member engagement, education, mentoring, and practical support for its members and Washington lawyers in general with an emphasis on providing timely resources for the ever-changing practice of law, responding to requests from legislators and otherwise reviewing pending legislation to address access to justice issues, and developing the next generation of practitioners. |
| **Top 2024-2025 Section Accomplishments:** |
| (1) The Section had a very successful and well-attended Midyear meeting at Semiahmoo in Blaine and continued to provide for hybrid learning through seasonal CLE offerings. |
| (2) Members of the Section worked together with WSBA leaders and legislators on multiple subcommittees to review and comment on bills for review by the legislature, and to communicate with members regarding pending bills. |
| (3) The Section engaged new and young lawyers through both its Fellow Program and its Young Lawyer Liaison to the Board of Governors. |
| (4) The Section continued the publication of its Newsletter by publishing 3 issues. |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* |

| | |
|---|---|
| **1** | **Publishing quarterly Newsletters to section members** |
| **2** | **Clarifying the purpose and content of both the RPPT website and the WSBA RPPT Section page, establishing a file storage and sharing system, and improving the functionality of the RPPT listservs through a new vendor** |
| **3** | **Continuing outreach to new lawyers through sponsoring events** |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **The Section remains committed to growing its membership enrollment by providing for direct member benefits in continuing education and networking opportunities.** |

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| **2** | **The Section is interested in developing leadership among new lawyers in its ranks through the use of its Fellows program as a way to increase engagement and participation.** |
| **3** | **Continue to work closely with the legislature and WSBA leaders and staff to ensure a robust partnership for the benefit of Washington lawyers and the public on matters of real property, probate and trust.** |

**Please describe how this entity is addressing diversity, equity, and inclusion:**
*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?*

**The Section focuses on diversity, equity and inclusion by using multiple means of communicating with members (e.g., Listserv, member emails, newsletter). The Section provides scholarships to members to offset the costs of attending the midyear with a focus on enabling members to attend who otherwise would not be able to.**

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**
*For example:*
- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

**WSBA staff provides outstanding support to the Section for its activities, initiatives and CLE planning. We appreciate our BOG liaison's involvement by attending meetings and sharing ways that we can provide feedback to the BOG.**

**Please quantify your section's 2024-2025 member benefits:**

*For example:*
- *$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

| | |
|---|---|
| Co-sponsored the RPPT Midyear Meeting at Semiahmoo in Blaine and 4 online full-day CLE seminars with WSBA. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 1 reception at the Section Midyear meeting. | Receptions/forums hosted or co-hosted |
| $5,675 | $ amount given through donations/scholarships/grants. |
| 3 newsletters published (Summer 2024, Winter 2024, Spring 2025) | Newsletters/publications produced |

| | |
|---|---|
| Click or tap here to enter text. | Mini-CLEs produced |
| 1 event at the Section Midyear meeting | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |
| The section continued support of the Legislative Tracker project in collaboration with law students, which has been a successful way to increase opportunities for engagement among members and students. The Real Property Council engaged with the following bills, among others: 1081, 1096, 1403, 5129, 5559, 5611 and 5686. The Probate and Trust Council engaged with the following bills, among others: SB 5037, HB 1215, ESSB 5813. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 2174 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $87893.80 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $79800.39 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 13 voting/7 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 5 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for* |

| | | |
|---|---|---|
| | | *vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Senior Lawyers |
| **Chair or Co-Chairs:** | David Sprinkle (Chair) |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Lester Parvin Price Jr. |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| To provide experienced lawyers a chance to reconnect and provide the larger legal community with news of legal developments of interest to older lawyers and others | |
| **Strategy to Fulfill Purpose:** | |
| Sponsoring and presenting continuing legal education courses | |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** | |
| Dissemination of information of special interest to seniors and others | |
| **Top 2024-2025 Section Accomplishments:** | |

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| Newsletter publication |
| CLEs |
| Click or tap here to enter text. |
| Click or tap here to enter text. |

| | |
|---|---|
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* | |
| **1** | **Recruit a newsletter editor to replace the editor who retired** |
| **2** | **Explore rebranding by changing the name of the Section** |
| **3** | **Continuing to provide legal education along the lines outlined above** |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **To recruit a larger number of older lawyers and others to the Section and to the Executive Committee** |
| **2** | **To honor Brian Comstock's vision for the future of the Section. RIP.** |
| **3** | Click or tap here to enter text. |

**Please describe how this entity is addressing diversity, equity, and inclusion:**
*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?*

**Trying our best to recruit new members from all backgrounds.**

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**
*For example:*

- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

**WSBA personnel have been very helpful in our efforts to produce quality and interesting CLEs, and in keeping us informed about Bar initiatives of interest. Carolyn MacGregor and Rachel Matz have been outstanding.**

**Please quantify your section's 2024-2025 member benefits:**

*For example:*

- *$3000 Scholarships, donations, grants awarded;*

| | |
|---|---|
| • *4 mini-CLEs produced* | |
| 1 CLE seminar with reduced fees for Section members | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| Click or tap here to enter text. | Receptions/forums hosted or co-hosted |
| Click or tap here to enter text. | $ amount given through donations/scholarships/grants. |
| Publication of our "Life Begins" newsletter – 3 issues | Newsletters/publications produced |
| Click or tap here to enter text. | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 231 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $9952.49 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $850.00 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 13 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |

| | | |
|---|---|---|
| | 5 | **Number of Vacancies for FY26:** *The number of vacant positions as of October 1, 2025 (FY26).* |
| | 8 | **Number of Applicants for FY26 open positions**: *Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

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It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | Solo and Small Practice Section |
| **Chair or Co-Chairs:** | Darcel Lobo |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Kari Petrasek |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| To help solo and small practice attorneys ethically conduct a profitable, satisfying business by acting as a clearing house for qualified law practice management and technology information. | |
| **Strategy to Fulfill Purpose:** | |
| Through online resources, educational materials, networking events and mentoring opportunities | |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** | |
| Our CLEs help lawyers run the business end of their practices ethically and efficiently which in turn fosters better relations with other counsel and the courts. In particular, effective use of | |

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| technology helps lawyers meet their obligations, manage trust accounts and manage communications with clients and opposing counsel. On our list-serve, members frequently solicit advice and share experiences regarding legal issues and how to deal with opposing counsel, courts and staff. |
| **Top 2024-2025 Section Accomplishments:** |
| Hosted 8 mini-CLEs |
| In Person multi-day conference |
| Exceeded budget projections for our section |
| Continued to develop section member resources in members-only website |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* |

| | |
|---|---|
| **1** | **Increase membership to 1,000 by 12/31/26** |
| **2** | **9 free mini CLEs per year** |
| **3** | **Increase in person attendance at annual conference to at least 100 by FY 2024-2025 conference** |

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|---|---|
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | Click or tap here to enter text. |
| **2** | Click or tap here to enter text. |
| **3** | Click or tap here to enter text. |

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| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* |
| **Our membership is as diverse as WSBA membership. We invite minority bar associations to provide liaisons to our EC. We have intentionally reached out across the State to recruit applicants for our EC. Note: At least three of our existing EC members are also members of minority bar associations. Diversity is always one of our goals when selecting speakers for our CLE and webinars.** |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions* |

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|---|
| • *Involvement with Board of Governors, including assigned BOG liaison*<br>• *Ideas you have on ways WSBA can continue to strengthen/support your entity.* |
| **WSBA Liaison has been very helpful. Communication with our section members regarding technology changes/updates could be improved.** |
| **Please quantify your section's 2024-2025 member benefits:**<br><br>*For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* |

| | |
|---|---|
| 1 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 1 | Receptions/forums hosted or co-hosted |
| $4000 | $ amount given through donations/scholarships/grants. |
| Click or tap here to enter text. | Newsletters/publications produced |
| 8 | Mini-CLEs produced |
| 2 | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Numerous resources provided to members via our members-only website | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

**SECTION DATA**
***To Be Completed by WSBA Sections Team***

| | | |
|---|---|---|
| **Section Membership Information:** | 929 | **Membership Size**: *As of September 30, 2025.* |
| | $41812.30 | **FY25 Revenue ($):** *As of September 30, 2025.* |

| | | |
|---|---|---|
| | $13530.82 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 12 voting/4 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 1 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 6 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | WSBA Tax Section |
| **Chair or Co-Chairs:** | Cat Connell |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Nam Nguyen (District 10) |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The purposes of the Section are to further the knowledge of the members of the Section and the Bar in areas of the law involving federal, state, and local taxation, and to assist in the activities of WSBA and otherwise to further the interest of the WSBA and of the legal profession as a whole. | |
| **Strategy to Fulfill Purpose:** | |
| The Section strives to foster visibility of, and conversation concerning, the practice of tax law. The Section is organized with multiple subcommittees which include various areas of tax law practice. Through those subcommittees, the Section is able to provide more specific, substantive service to members while also providing broad benefit through the Section as a whole. Through Section hosted events, which typically are little to no cost to members, members are provided opportunities involving networking, continuing legal education, and access to notable speakers from across the | |

country (including in recent years multiple US Tax Court judges, the IRS Commissioner, and IRS Chief Counsel).

**How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?**

Over the years, the Section has made donations to and worked closely with both the UW Law and Gonzaga Law Low-Income Taxpayer Clinics, whose purposes are to provide free representation to low-income taxpayers with federal tax issues. Additionally, the Section has had discussions with both the Washington Department of Revenue and the LITCs about the possibility of developing low-income taxpayer clinics that would provide free representation concerning Washington state tax issues. The Section also sponsors an annual scholarship to a law student who has a demonstrable economic need and interest in practicing tax law in Washington. Further, through the Section's co-chair model, the Section encourages collaboration and conversation by partnering government practitioners with private practice practitioners on both the state and federal side.

**Top 2024-2025 Section Accomplishments:**

The Taxation Section has continued to build out the Diversity, Equity, and Inclusion subcommittee, which we understand was the first DEI committee among the WSBA sections. This increased investment in DEI led to the development of the PATH mentorship program, which launched in FY24 and continued to grow throughout FY25.

The Section continued its renovation of the website, efforts of which are currently focused on making more educational materials available for members' access, which includes (to the extent possible) archiving past CLE presentations and materials.

The Section was effective in providing timely CLE updates on significant changes in tax law during FY25, which included a significant Washington Supreme Court decision, Washington's May budget bill, OBBBA, and the significant changes to federal taxing authority workforces and structural organizations.

Click or tap here to enter text.

**Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**
*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*
*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.*

| | |
|---|---|
| **1** | **The Section will work towards expanding its member events beyond the greater Seattle area, with a particular focus on Spokane. This was an emphasis identified during FY25, which included plans for a US Tax Court meet-and-greet (which unfortunately had to be cancelled due to the Judge's availability). This expanded outreach will include both opportunities for Section members as well as Gonzaga Law students.** |
| **2** | **The Section intends to reinstitute an annual law student event. Prior to the COVID-19 Pandemic, the Section had a long history of hosting an annual breakfast with law students. This gave students the opportunity to meet practitioners from across tax practice and gain exposure and insight into the** |

| | |
|---|---|
| | **various types of work and opportunities available across tax law, while also giving practitioners the opportunity to meet the next generation of attorneys.** |
| **3** | **The Section intends to sponsor DEI-focused events and CLEs, ideally in collaboration with other sections.** |
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **Expansion of the PATH Mentorship Program for young tax professionals and law students.** |
| **2** | **Establish an annual half-day CLE.** |
| **3** | **Establish regular, direct connection and outreach with members beyond western Washington.** |

**Please describe how this entity is addressing diversity, equity, and inclusion:**
*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?*

**In recent years, the Section created its DEI Committee which developed and launched the PATH Mentorship Program for young tax professionals and law students. Having identified exposure and visibility of tax law as a potential barrier to entry into the practice, the Section intends to explore potential outreach opportunities with universities and high schools, with a focus on underserved and marginalized communities.**

**Please share feedback regarding the support and engagement provided by WSBA staff and leadership**
*For example:*
- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

**The Section's appreciation and gratitude for Carolyn MacGregor and Noah Baetge's efforts in supporting our operations cannot be overstated.**

**Please quantify your section's 2024-2025 member benefits:**

*For example:*
- *$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

| | |
|---|---|
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |

| | |
|---|---|
| 2 | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| 1 (included WA State tax law update) | Receptions/forums hosted or co-hosted |
| $5,000 scholarship | $ amount given through donations/scholarships/grants. |
| Click or tap here to enter text. | Newsletters/publications produced |
| 2 | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| 1 | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Sponsor NASBTS membership | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 603 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $20086.25 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |
| | $13963.38 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 27 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |

| | | |
|---|---|---|
| | 24 | **Number of Applicants for FY26 open positions**: *Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE BAR ASSOCIATION

# WSBA SECTION ANNUAL REPORT

**FY 2025: October 1, 2024 – September 30, 2025**

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards[i]), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2024 – September 30, 2025. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, October 17**: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

| | |
|---|---|
| **Name of Section:** | World Peace Through Law |
| **Chair or Co-Chairs:** | Bridgett Fisher |
| **Staff Liaison:** *(include name, job title, and department if known)* | Carolyn MacGregor, Sections Program Specialist, Advancement Department |
| **Board of Governors Liaison:** | Allison Widney |
| **Purpose:**<br>*May be stated in Bylaws, Charter, Court Rule, etc.* | |
| The World Peace Through Law section promotes education on and discussion of law, peace, and human rights. The Section seeks to promote the rule of law and peaceful dispute resolution among states. The section promotes fostering education on public international law and human rights. | |
| **Strategy to Fulfill Purpose:** | |
| The Section provides a forum for ideas and collaboration about law, peace, and human rights. The Section offers educational opportunities, such as Continuing Legal Education (CLE) as well as non-CLE programs and supports other efforts to study and promote law, peace, and human rights. | |
| **How does the section's purpose help further the mission of the WSBA "to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice"?** | |

| |
|---|
| The WPTL Section's purpose is to serve the public and members of the Washington State Bar Association by advocating the need to protect worldwide human rights through the law. |
| **Top 2024-2025 Section Accomplishments:** |
| The Section produced CLEs free of charge for members. |
| The Section built connections with possible speakers and other sections for future collaboration and content. |
| The Section collaborated with other sections to produce and co-sponsor CLE content with broader appeal across sections. |
| Click or tap here to enter text. |
| **Next Fiscal Year: 2025-2026 Top SMART Goals & Priorities:**<br>*Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound*<br>*Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.* |

| | |
|---|---|
| **1** | **Sponsor and promote CLEs with WSBA's MCLE Department and collaborate with other sections of the WSBA.** |
| **2** | **Actively recruit more members to participate in the Section.** |
| **3** | **Continue to improve upon the number of programming initiatives from past years.** |

| | |
|---|---|
| **Looking Ahead:** *Please share any long-term goals and/or priorities that your entity aims to address.* | |
| **1** | **Increase engagement with Section members by holding networking events.** |
| **2** | |
| **3** | Click or tap here to enter text. |

| |
|---|
| **Please describe how this entity is addressing diversity, equity, and inclusion:**<br>*How have you elicited input from a variety of perspectives in decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive and eventually lead in the profession? Other?* |
| **The Section has an active Listserv where we continuously seek input from our members. Our Executive Committee made an active effort to include CLEs and other programs which highlighted diverse populations.** |
| **Please share feedback regarding the support and engagement provided by WSBA staff and leadership**<br>*For example:*<br>• *Quality of WSBA staff support/services, including technology solutions*<br>• *Involvement with Board of Governors, including assigned BOG liaison* |

| |
|---|
| • *Ideas you have on ways WSBA can continue to strengthen/support your entity.* |
| **The Section collaborates well with the WSBA staff. The WSBA staff members are responsive and are always available to assist the Section. We wouldn't be able to achieve our goals without the help and support of the WSBA staff. We're looking forward to another year of strong partnership and collaboration.** |

| **Please quantify your section's 2024-2025 member benefits:**<br><br>*For example:*<br>• *$3000 Scholarships, donations, grants awarded;*<br>• *4 mini-CLEs produced* | |
|---|---|
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA |
| Click or tap here to enter text. | Co-sponsored half-day, full-day and/or multi-day CLE seminars with *non*-WSBA entity. |
| Click or tap here to enter text. | Receptions/forums hosted or co-hosted |
| Click or tap here to enter text. | $ amount given through donations/scholarships/grants. |
| Click or tap here to enter text. | Newsletters/publications produced |
| 2 | Mini-CLEs produced |
| Click or tap here to enter text. | New Lawyer Outreach events/benefits |
| Click or tap here to enter text. | Recognitions/Awards given |
| Click or tap here to enter text. | Legislative activity (Bills reviewed, tracked, proposed) |
| Click or tap here to enter text. | Other (please describe): |
| Click or tap here to enter text. | Other (please describe): |

| **SECTION DATA**<br>***To Be Completed by WSBA Sections Team*** | | |
|---|---|---|
| **Section Membership Information:** | 104 | **Membership Size**:<br>*As of September 30, 2025.* |
| | $3595.22 | **FY25 Revenue ($):**<br>*As of September 30, 2025.* |

| | | |
|---|---|---|
| | $224.00 | **FY25 Direct Expenses ($)**<br>*As of September 30, 2025. This does not include the Per-Member-Charge.* |
| **Section Executive Committee Information:** | 9 voting/0 non-voting | **Full Size of Executive Committee (per Section bylaws)**:<br>*Include and specify voting and non-voting positions.* |
| | 0 | **Number of Vacancies for FY26:**<br>*The number of vacant positions as of October 1, 2025 (FY26).* |
| | 4 | **Number of Applicants for FY26 open positions**:<br>*Applications submitted in the Spring of 2025 for vacant positions and terms beginning October 1, 2025 (FY26)* |

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors
Budget and Audit Committee

From: Terra Nevitt, Executive Director

Date: April 13, 2026

Subject: FY 2026 Budget Reallocations for Q2

Background

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

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

President Adewale was notified of the monthly reallocations on February 9, March 9, and April 13.

For FY 2026, the WSBA's annual operating budget is $27,892,774, and the Executive Director's limit for reallocation is up to $1,394,639 (5%). The total amount of funds reallocated from October 1 through March 31st are $214,888.15 (0.77% of annual operating budget).

FY26 Budget Reallocations for Q2

1) ***Justice Gap Scoping Work Group*** was approved by the Board of Governors at their January 16, 2026 meeting. This is a collaborative effort between the Board of Governors and the Access to Justice Board, and it was not originally included in the fiscal year 2026 budget. An estimated $6,200 is needed to support in-person activities, including three retreats. Funds were reallocated from the Access to Justice Board expense, and BOG Elections budgets to support this need.

2) ***BOG Travel & Outreach*** This expense line was incorrectly budgeted for FY26 and an estimated additional $25,000 is needed to support the remaining outreach events planned for the year including Local Hero Award luncheons and meetings with various entities planned around the Board of Governors meeting schedule. Funds were reallocated from the BOG Meetings budget line, which had savings from three meetings that had been planned as 2-day events but only required 1-day.

3) ***Council on Public Defense*** expenses to host an in-person strategic planning retreat was not originally planned for in FY26. To support this need, funds were reallocated equally from the Access to Justice

Board and Diversity Events and Projects budgets. Going forward, the Council is planning to host this retreat regularly and will be including this in their annual budget request for FY27.

WASHINGTON STATE BAR ASSOCIATION

**To:** Board of Governors

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

**Date:** April 7, 2026

**Re:** **Summary of Media Contacts**, Feb. 10-April 6, 2026

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| Date | Journalist and Media Outlet | Inquiry |
|---|---|---|
| Feb. 20 | Neetish Basnet, Puget Sound Business Journal | Working on special section for legal services, including AI in Law. Referenced Legal Tech Task Force's report and survey. |
| March 5 | Ben Adlin, Law360 | Sought comment about disbarred lawyer. |
| March 6 | Don Jenkins, Capital Press | Referring SB5925, inquired about WSBA's role in the disciplinary process. |
| March 11 | Alexandra Duggan, Spokesman-Review | Inquired about a grievance against a member. Sent standard media response. |
| March 24 | Jen Miller, The New York Times | Working on a story for the Real Estate section about how to deal with troublesome neighbors. Looking for a real estate attorney versed in tree law. Forwarded inquiry to RPPT's Real Property Council director. |

**News Releases**

- "WSBA Honors Olympia Attorney Trevor Zandell with Local Hero Award," March 6.

# # #

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

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**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

**SUGGESTED AMENDMENTS TO THE ADMISSION AND PRACTICE RULES**

**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).

(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

**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

**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.]



Washington State Bar Association
1325 4th Ave Ste 600
Seattle, WA 98101-2539

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.

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

**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 or District of Columbia 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 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 Counsel

Jordan Couch, Governor At-Large

**DATE:** April 7, 2026

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

---

**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.

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.
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

~~"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:

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

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# 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

**CC:** Terra Nevitt, Executive Director

**FROM:** Renata Garcia, Chief Regulatory Counsel
Catherine Biestek, Managing Regulatory Counsel

**DATE:** April 7, 2026, revised April 15, 2026

**RE:** Application Filing Deadlines - Proposed Amendments to WSBA Admissions Policies Regarding LPO exam and NextGen Bar Exam Application Deadlines

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**ACTION**: Presented for adoption are proposed amendments to the WSBA Admissions Policies relating to application filing deadlines.

The primary purpose for the proposed amendments is to change the application filing deadlines for the Limited Practice Officer (LPO) exam and add one additional deadline for applications for the NextGen bar exam. Each issue will be addressed separately.

LPO Exam Application Deadlines

The proposed amendments establish new application filing deadlines for the LPO exam. Going forward, the WSBA will administer the LPO exam on the first Monday in October and April instead of the Monday prior to the bar exam in February and July. The primary reason for changing the LPO exam dates is for the benefit of the applicants. July is a busy time for the real-estate industry so fewer people are able to take time off for the LPO exam at that time. In addition, because the LPO exam will be able to be held at the WSBA offices, there will be substantially less direct costs associated with the LPO exam administration. Because the dates of the exam are changing, the application deadlines and deadline to apply for testing accommodations on the LPO exam need to be adjusted.

Additional Application Deadline for NextGen Bar Exam

At this time, the WSBA expects to release results from the first administration of the NextGen bar exam later than has been done in the past for the legacy UBE. Due to the timing of the expected release of the July exam results, repeat applicants who failed the July exam might receive those results after the first deadline. In order to avoid penalizing them with a late fee, the proposed amendments add a repeat failing deadline without the late fee assessment.

*April 15, 2026 update*: In response to feedback in the equity analysis, the proposed deadline language was revised to "Deadline for Applicants Who Did Not Pass Immediately Preceding WA Exam – With No Late Fee." This deadline does not apply to all repeat applicants. The revised language clearly provides that this deadline only applies to applicants who did not pass the immediately preceding bar exam in Washington and that no late fee will be applied.

Information for Fiscal Analysis

The proposed amendments have very little financial impact on the WSBA. The dates of the LPO exam were approved by the Executive Director, the amendments simply establish the filing deadlines. Indirectly, however,

there are several thousands of dollars saved annually for holding the LPO exam at the WSBA offices.

Information for Equity Analysis

Although not directly attributed to the proposed amendments, the new LPO exam dates reduce barriers for applicants and allows applicants to prepare for the exam when they have more time to do so.

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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 to application filing deadlines are expected to have financial implications across multiple segments of the WSBA's budget. The recommendation to introduce an additional application deadline for the NextGen bar exam will permit individuals who do not pass the summer exam to apply for the winter exam without incurring a late fee, provided they submit their applications by the new December 5 deadline. At present, all applicants—including those who do not pass the summer exam—who apply after the initial October 5 deadline for the winter exam are assessed a $300 late fee. By establishing this supplementary deadline, certain applicants who would previously have been subject to the late fee will now be exempt. Consequently, there will be a reduction in late fee revenue. Historical financial data suggest that approximately 30 applicants per year will benefit from this change, resulting in an estimated annual decrease in late fee collections of $9,000.

The primary impact on indirect expenses concerns 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 resources from other internal departments.

As mentioned above, the proposed LPO exam application deadlines are a result of a change to the exam dates. With the change of the dates, the exam location has been moved to be hosted at the WSBA office which results in cost savings of approximately $9,000 annually. However, the proposal itself does not directly generate a fiscal impact.

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 the WSBA admissions policies on application filing deadlines do not pose significant equity concerns.

The proposed changes related to the date and timing of the LPO exams appear to be informed by the unique experiences of LPO applicants. By aligning exam dates according to times when applicants are likely to have more time for study and preparation, the proposed changes have a potential to have a positive impact on pass rates.

The proposed changes to the application deadline for the NextGen bar exam also have the potential to improve fairness in the admissions process. Recent 2025 data revealed that people who are first-generation college students, or whose primary language is not English, and people from communities that are marginalized and underrepresented in the legal profession are less likely to pass the bar exam, likely due to increased barriers to resources and time required to prepare.

One minor concern about the policy is around the language used in the policy itself. To improve inclusivity and clarity of language, the Board may consider revising the language from "Failed the Immediately Preceding WA Exam Deadline With No Late Fee" to "Deadline For Repeat Bar Examinees" or similar language.
*[Note: The recommendation was modified to address this input]*

Attachments

1. Proposed Amendments to the WSBA Admissions Policies – Markup

**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.

**I. [Unchanged.]**

**II. APPLICATION REQUIREMENTS**

A. Application Submission Policy

**[Unchanged].**

B. Exam Application Filing Deadlines

Only applications for an exam (excluding petitions for reinstatement under APR 25) have a filing deadline. Applications for admission by bar exam are accepted beginning February 1 for the summer bar exam and September 1 for the winter bar exam. Applications for admission by LPO exam are accepted beginning June 15 for the fall LPO exam and December 15 for the spring LPO exam. Filing deadlines for applications to take an examination are as follows:

| **Bar Examination** | **Applications Accepted** | **First Deadline** | **Late Filing Deadline** | **~~Failed the~~ Deadline for Applicants Who Did Not Pass Immediately Preceding ~~Winter~~ WA Exam - ~~Deadline~~ With No Late Fee** |
|---|---|---|---|---|
| Summer Bar Exam | February 1 | March 5 | April 5 | May 5 |
| Winter Bar Exam | September 1 | October 5 | November 5 | ~~N/A~~December 5 |

| **LPO Examination** | **Applications Accepted** | **First Deadline** | **Late Filing Deadline** |
|---|---|---|---|
| Fall LPO Exam | June 15 | July 15 | August 15 |
| Spring LPO Exam | December 15 | January 15 | February 15 |

The deadline will be the next business day when a deadline falls on a Saturday, Sunday or holiday.

Late filing requires payment of a late filing fee as provided in the fee schedule. No applications will be accepted after the late filing deadline except for applicants who failed the immediately preceding ~~winter~~ Washington bar exam and are applying for the following ~~summer~~ Washington bar exam; those applicants are not required to pay the late filing fee and the deadline will be May 5 for the summer bar exam and December 5 for the winter bar exam.

Applications, including payment, must be submitted online by 11:59 P.M. (PST/PDT) the day of the deadline. Applications, or payments, submitted after the first deadline will incur a late filing fee.

Exam applications not submitted by the late filing deadline will be deleted.

C. Non-Exam Application Deadlines

**[Unchanged.]**

D. Other Deadlines

Request testing accommodations on bar exam .....80 days prior to first day of exam.
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.

E. Other Non-Exam Deadlines

**[Unchanged.]**

**III.-V. [Unchanged.]**

**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. 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. [Unchanged.]**

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**CC:** Terra Nevitt, Executive Director

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

Bobby Henry, Associate Director for Regulatory Services, Paris Eriksen, Manager of Volunteer Engagement

**DATE:** April 2, 2026

**RE:** Board of Bar Examiners

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**ACTION**: The WSBA Regulatory Services Department (RSD) requests that the BOG expand the pool of examiners on the Board of Bar Examiners from 50 to 75 members to support grading of the NextGen Bar exam and portfolio items submitted from applicants seeking admission by portfolio evaluation (the proposed experiential alternative to the bar exam).

Background

Rule 2(a)(1) of the Admission and Practice Rules (APR) requires the Board of Governors to appoint a Board of Bar Examiners (BOBE) to grade the bar exam and maintain the Washington Law Component test and materials. Examiners receive a stipend for grading the bar exam and reviewing the Washington Law Component materials. The Committees and Boards Policy allow for a pool of 50 examiners who serve for a four-year term on the BOBE. Although the BOBE currently has 44 examiners, it can be difficult to schedule enough examiners for a bar exam grading session due to the examiners' schedules and other obligations.

The recent adoption of, and transition to, the NextGen bar exam together with the anticipated adoption of admission by portfolio evaluation as a new alternative to the bar exam present significant changes for the Board of Bar Examiners. This means examiners must adapt to new types of assessments and develop expertise in grading the new exam format and the new portfolio materials. In addition to grading, examiners will be responsible for writing new ethics prompts for the portfolio evaluation, further expanding their role. This will place increased demands on examiner availability and flexibility.

To maintain flexibility in scheduling, reduce strain on current examiners, and support consistent scoring quality and work product, we ask that the pool of examiners on the BOBE be expanded from 50 to 75. Increasing the number of examiners will ensure there are enough examiners with the expertise needed to ensure examiners are available for frequent grading sessions and able to competently grade the bar exam answers, assess the portfolio items, and write ethics prompts. This expansion will support a smooth transition as the Board of Bar Examiners takes on these expanded responsibilities.

**Information for Fiscal Analysis**

Provide information to help inform the Fiscal Analysis.

- Increasing the size of the pool of examiners, does not in itself have a fiscal impact. There will be a fiscal impact for the actual grading but that will be included in an assessment of the admissions application fees and included in the annual budget process for fiscal year 2027.

**Information for Equity Analysis**

Provide information to help inform the Equity Analysis:

- Increasing the size of the pool of examiners will provide an opportunity for a more diverse pool of examiners.

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 fiscal impact of the proposed change is primarily on costs associated with indirect expenses for staff time dedicated to drafting the proposal, updating applicable records, disseminating information regarding changes to stakeholders, and administrative work to support recruitment and management of the increased number of volunteers. 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, while not directly caused by the proposed changes, there will be in increase in direct expenses for portfolio evaluations by examiners (which are offset by application fees) beginning in FY 2027.

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 changes to expand the pool of bar examiners is primarily related to efficiency and does not appear to present any concerns with regard to equity, inclusion, or diversity.

Attachment

Proposed Amendments to Committees and Boards Policy - Markup

WASHINGTON STATE
BAR ASSOCIATION

# Committees and Boards Policy

**Effective with 1993-94 Committee Appointments. Amended July 19, 1996; Mar, 28, 1997; Feb. 13, 1999; May 19, 2000; Jan. 19, 2002, Oct. 2002; Apr. 2003; Feb. 2004; Mar. 11, 2005; Jan. 2012; Sept. 2012; Jan. 2013; July 2013; Sept. 2015; Sept. 2020; July 2022; Jan. 16, 2026; May 1, 2026.**

**Diversity:** To further the WSBA policy of advancing and promoting diversity, equality, and cultural understanding, the Board of Governors shall take into consideration the makeup of a committee or board in terms of diversity when considering appointments to it. (Committee Membership Selection Advisory Policy.) To assist the Board in fulfilling this policy, all applicants and appointees to committees and boards will be required to complete the Committee/Board/Panel Application Form. This form shall, on a voluntary basis, solicit information including, but not limited to, the person's ethnicity, gender, sexual orientation, disability status, area of practice, years of practice, employer, and number of WSBA members in law firm.

**Size of Committees and Boards:**

1. Committees:
    - Committee on Professional Ethics: 9
    - Court Rules and Procedures Committee: 28
    - Editorial Advisory Committee: 14
    - Judicial Recommendation Committee: 22
    - Legislative Review Committee: 35 maximum
    - Pro Bono and Public Service Committee: 18
    - Washington New Members Committee: 18
2. Boards:
    - Board of Bar Examiners: ~~50~~ 75 lawyers maximum
    - Character and Fitness Board: 10 WSBA members minimum (at least one from each district) and 3 public members (APR 23(a))
    - Law Clerk Board: 13 lawyers
    - Client Protection Board: 11 WSBA members and 2 public members (APR 15(b)(2))

**Membership Requirements:** All members of WSBA committees and boards must be active members of the WSBA or inactive, pro bono, or emeritus as deemed appropriate by the applicable committee or board, with the following exceptions: (a) Up to two Emeritus/Pro Bono members are permitted to serve on the Pro Bono and Public Service Committee and may be appointed to serve as the Chair, Co-Chair or Vice-Chair (WSBA Bylaws IX.B.1.a.); (b) Members of the Character and Fitness Board must have been members of the WSBA for seven years before their term begins (APR 20(b), ELC 2.3(b)(2));) (c) Members of the Washington New Members Committee must meet the WSBA new member criteria on the start date of their term (WSBA Bylaws XIIB); (d) Faculty of Washington state law schools who are not active

members of the WSBA are permitted to serve on the Committee on Professional Ethics (WSBA Bylaws IX.B.1.a.); (e) Judicial members may serve on the Board of Bar Examiners (APR 2(a)(1)); and (f) Judicial members may serve on the Law Clerk Board (APR 2(a)(2)). No WSBA staff member will be appointed to serve as a WSBA committee or board member.

**Selection of Members:** Nominations for open positions on each standing committee and board will be made by a nomination team comprising the chair, vice-chair or chair-elect, staff liaison and BOG liaison, in consultation with WSBA diversity and inclusion staff. In addition, each district-based BOG member may nominate one applicant from his or her district to any committee or board that does not have a continuing member from that district. At large BOG members may, as a group, nominate one applicant to each committee or board. If this process results in more nominations than there are open positions on a committee or board, nominations from BOG members will take priority over nominations from the nomination teams. If nominations from BOG members alone exceed the number of open positions, the nomination teams will make recommendations to the BOG as a whole. Exceptions: The Judicial Recommendation Committee, Washington New Members Committee, Legislative Committee and Committee on Professional Ethics have unique member selection procedures which are described in separate policy documents. The nomination teams will make recommendations for non-lawyer appointments, as these nominations are made by the BOG as a whole and forwarded to the Supreme Court for appointment. (APR 20(a), ELC 2.3(b)(1).) The Board of Governors will make most committee and board appointments (and nominations of non-lawyers to the two boards cited above) at the July Board of Governors meeting. At the same time, the Board of Governors will approve a list of alternate appointees for each committee and board. The alternate lists will be effective for one year. If any committee or board member positions remain open after the July Board of Governors meeting, they will be filled as soon as possible.

**Definition of Membership:** Although WSBA committees operate under an "open meeting" policy that allows any member of the WSBA or public to attend a meeting (See (12) below), in order to be recognized as a member of a committee or board an individual must be appointed to the committee or board.

**Selection of Chair and Vice-Chair:** The President-elect shall nominate committee and board Chairs, Co-Chairs, Chair-elects, and Vice-Chairs for appointment by the Board of Governors for the year in which the President-elect will serve as President. (WSBA Bylaws, IX.B.1.c.) Committee chairs are generally limited to a single year term, except in unusual circumstances, in which they may be appointed for an additional year. If an individual is appointed as committee Chair but is not a new or returning member of the committee, he or she will also be appointed as a member for one year, which may temporarily increase the size of the committee. Exception: The Washington New Members Committee has a member position set aside for leadership described in a separate policy document.

The President-elect shall commit to diversity in nominating Chairs, Co-Chairs and Vice-Chairs, taking into consideration the makeup of a committee or board and the potential impact of appointing a particular individual as Chair.

**Expenses:** Committee and board member expenses shall be reimbursed in accordance with the WSBA Expense Reimbursement Policy as adopted by the Board of Governors. Reimbursement of travel expenses for out-of-state committee or board members to attend committee or board meetings is limited to the

approximate cost of in-state travel. Participation in meetings by telephone conference call or videoconferencing is encouraged when possible because it saves significant travel time and expense.

**Terms:** Except as indicated below, committee appointments shall be for 2-year terms. A member's service on any committee shall be limited to two consecutive terms, after which the member cannot be reappointed to that committee for three years, subject to individual exceptions as approved by the Board of Governors. Appointments to the WSBA Legislative Committee shall be made pursuant to the written Board of Governors policy for that committee. (WSBA Bylaws, IX.B.1.b.)

The following committees and boards shall have more than a 2-year term:

- Board of Bar Examiners: 4 years, no limit on number of terms (subject to Chair approval and completion of mandatory training)
- Character and Fitness Board: 3 years (APR 20(i)) (one-term limit)
- Committee on Professional Ethics: 3 years (two-term limit)
- Judicial Recommendation Committee: 3 years (JRC Guidelines I(A)(1))
- Law Clerk Board: 3 years (three-term limit)
- Client Protection Board: 3 years, no limit on number of terms (APR 15)
- Washington New Members Committee: 3 years

**Recommendations for Discipline-System Appointments:** Under ELC 2.2(c), a former WSBA officer, WSBA executive director, or Board of Governors member may not serve as a hearing officer, Disciplinary Board member, or Conflicts Review Officer until three years have expired after the former officer or member's departure from office. To ensure the proper implementation of the policy underlying ELC 2.2(c), the Board of Governors shall not recommend a former WSBA officer, WSBA Executive Director, or Board of Governors member for appointment as a hearing officer, Disciplinary Board member, or Conflicts Review Officer sooner than two years following such an individual's departure from office.

**Vacancies and Removal:** In the event of the resignation, death or removal of the Chair of a committee, the Board of Governors may appoint a successor to serve for the unexpired term. (WSBA Bylaws, IX.B.1.d.) In the event of the resignation, death or removal of a member of a committee or board, the nomination team may appoint a replacement from the alternate list that has been pre-approved by the Board of Governors. If there is no candidate on the alternate list that meets the committee's or board's needs, the nomination team may recruit a new applicant to be appointed by the Board of Governors.

Any member who fails to attend two consecutive regularly called meetings of the committee may be removed by the Board of Governors, in the absence of an excuse approved by the Chair of the committee or board. (WSBA Bylaws, IX.B.3.g.2).

**Notice of Vacancies:** The annual Committee/Board/Panel application form will be available in myWSBA and on the WSBA website starting in early January, and publicized via Washington State Bar News and broadcast email. Notice of non-lawyer committee and board openings also will be sent to nonlawyer organizations each winter. Mid-year vacancies will be publicized only if suitable applicants cannot be identified from the existing applicant pool.

**Exceptions:** These policies as a whole do not apply to the following entities, although individual provisions may apply: (a) WSBA panels; (b) The Supreme Court-created boards administered by the WSBA; (c) The Council on Public Defense; (d) discipline-system appointments, except as addressed in item (9); (e) WSBA state bar delegates to the ABA House of Delegates who are eligible for reappointment to three consecutive two-year terms; (f) Boards or commissions or other outside organizations to which the WSBA nominates or appoints members or representatives; (g) Diversity, Equity, and Inclusion Council.

**Open Meetings:** The WSBA is committed to conducting the regular and special meetings of the WSBA, its Board of Governors, and its divisions, committees, boards, task forces, and sections in an open and public manner. Through such openness, the WSBA intends to make information available to the people of Washington that will allow them to become informed about matters regarding the provision of legal services and other matters falling under the WSBA's authority. Exceptions to the "open meeting" policy are stated in court rules and regulations and the WSBA Bylaws. (WSBA Bylaws, VII.B.) Meetings and materials related to boards generally are governed by court rules and regulations that in many cases require confidentiality of all or parts of the meetings and all or parts of the board materials.

WASHINGTON STATE
BAR ASSOCIATION

**TO:** Board of Governors

**FROM:** Terra Nevitt, Executive Director
Paris Eriksen, Manager of Volunteer Engagement

**DATE:** April 8, 2026

**RE:** WSBA President-elect Candidate Interview & Selection Process

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**ACTION:** Elect the 2026-2027 President-elect.

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

**Interview Process**:
While there is only one applicant, it is organizational practice for uncontested candidates for president-elect to be interviewed and formally elected by the Board of Governors. To that end, the candidate interview will take place the morning of Friday, May 1. The candidate will be interviewed in public session and permitted fifteen minutes total for self-introduction and to answer questions. Governors may use the pool of interview questions provided but are not limited to these questions and may ask others should time permit.

**Voting Process**:

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

**Relevant WSBA Bylaws**:

*D. ELECTIONS BY BOARD OF GOVERNORS*

*1. Office of President-Elect.*

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

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

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

*3. Election Procedures*

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

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

**Attachments**:

Pool of Interview Questions

Nam Nguyen, candidate materials

WASHINGTON STATE
BAR ASSOCIATION

# Pool of Interview Questions for WSBA President-elect Candidates

*April 2025*

**Background**

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

**Interest and Commitment**

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

**Skills and Expertise**

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

**Current Topics and Member Engagement**

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

**Nam D Nguyen**

[redacted] Olympia, WA 98501
Phone: [redacted] ♦nam.wsba@gmail.com

March 31, 2026

Re: Statement of Interest for President-Elect of the Washington State Bar Association (WSBA)

My Fellow Governors:

If elected, as President of the WSBA, I would focus on two simple ideas – justice and joy. Justice because I believe that all legal professionals are in the business of justice and joy because we, as legal professionals, need a reminder that the practice often leads to personal and emotional fulfillment.

My campaign statement for the Board of Governors ended with "[as a Governor], my goal is for Washingtonians to view the legal profession as a facilitator for justice, because no matter your practice area, we are in the justice industry." By this, I wanted to convey that whether practicing litigation, transactions, or as legal counsel, every lawyer is working toward a fair and just outcome for clients, and the WSBA, as the legal profession's regulatory body, must promote justice within the profession and access to justice for all. I am proud that this Board has, over my tenure, supported initiatives to improve access to justice, such as opening the profession by developing alternative pathways to licensure and asserting the right to counsel by setting new standards for indigent defense. Most important, the Board has stood up for the rule of law through official statements and amicus briefs. As President of the WSBA, I am committed to supporting the Board on continuing to increase access to justice and on affirming the rule of law.

I will also thrive to continue the civility that we are showing toward each other on the Board. We have debated heavy issues, some relating to our core identity, such as our identity as immigrants or LGBTQ+ or simply as Americans. We have done so mostly with patience and grace toward each other.

But in focusing on these important issues, I fear that we may have neglected the joy. Most lawyers that I know do not just practice law for an income but also as a path to personal and emotional fulfillment. Most of us have felt the joy in helping a client obtain justice or guiding one through a transaction or a regulatory scheme, and other moments where practicing is not just work but also a pleasure. The profession must not neglect joy, especially when many of us are anxious over, among other things, the independence of the legal system, the rule of law, and how AI will affect the practice. As President of the WSBA, I will find ways to highlight those joyful moments and to remind attorneys and show the public (and the young people considering the law) that their work is not only important to our democracy but is also often enjoyable.

Thank you for your consideration,

Nguyen Nam D

Nam Nguyen

# Nam D Nguyen

[redacted]
Phone: [redacted]

## PROFESSIONAL SUMMARY

Dedicated public service attorney with 12+ years of experience litigating cases in Federal and State courts including 25+ appellate cases and multiple class actions. Skilled in leading efficient and high performing teams to advance organizational goals. Recognized for building consensus and coalitions (especially within state government), fostering innovations, and leading with integrity in government, legal, and non-profit settings.

## CORE COMPETENCIES

Executive Leadership • Legal Counsel and Compliance • Litigation • Organizing and Managing Committees and Workgroups • Strategic Planning • Budget Development & Fiscal Management • Legislative Advocacy • Building Relationships with State Agencies • Developing and Administering Administrative Processes • Problem Solving

## PROFESSIONAL EXPERIENCE

WASHINGTON STATE COMMISSION ON ASIAN PACIFIC AMERICAN AFFAIRS | Olympia, WA

**Director** | July 2024 - Present

- **Executive Leadership**: Leading a cabinet-level state agency, with a 12-member board, that advises government officials on issues impacting the Asian American & Native Hawaiian/Pacific Islander (AA&NH/PI) community
- **Grant Management**: Directing $500,000+ in state grants and contracts to community organizations and state agencies for outreach, education, data analysis and cultural programming
- **Budget & Operations Management**: Overseeing a $1.5 million budget while leading a multidisciplinary team of staff, consultants, and volunteers to advance AA&NH/PI rights and well-being across Washington State

OFFICE OF THE ATTORNEY GENERAL OF WASHINGTON | Tumwater, WA

**Assistant Attorney General** | March 2015 - July 2024

- **Litigation**: Litigated public pension and revenue cases, including 25+ appeals and multiple class actions
- **Public Pension Law Expert**: Counseled the Department of Retirement Systems on public pension law issues including tax, statutory interpretation, bankruptcy, family, administrative, and public disclosure law
- **Transactions Counsel**: Advised the Department of Revenue and the Department of Enterprise Services on legal issues relating to procurement and contracting, public records, and real estate leasing
- **Intern Management:** Supervised Revenue and Finance Division interns from 2018 to 2024

DAVIS WRIGHT TREMAINE LLP | Bellevue, WA

**Attorney** | September 2014 - March 2015

- **Real Estate Transactions Management**: Analyzed title reports, leases, contracts, amendments, and drafted risk assessments for a high volume of telecommunication real estate transactions

DENSON & TANG LAW FIRM | Houston, TX

**Attorney** | May 2013 – June 2014

- **Business Law Practice**: Provided legal/general counsel services for small and midsize businesses, including managing litigation, contract negotiations, financial transactions, business acquisitions, and real estate acquisitions

CAO LAW FIRM | Houston, TX

**Attorney** | January 2012 – March 2013

- **Business Development**: Established and managed branch office for former New Orleans congressman's law firm
- **Mass Tort Litigation**: Filed, managed, and negotiated settlements for hundreds of BP Oil Spill cases

AMERICORPS VISTA | Bayou La Batre, AL

**Volunteer** | December 2010 – December 2011

- **Program Development**: Created work training/re-training programs for hundreds of unemployed and underemployed workers displaced by the BP Oil Spill

## ACADEMIC

BOSTON UNIVERSITY SCHOOL OF LAW | Boston, MA
**Juris Doctor |** August 2007 − May 2010

- Editor, Legislative Drafting Clinic: Drafted, edited, and revised legislation for local and foreign governments
- Student Attorney: Handled complex immigration case, including appeal, that attempted to set a precedent on refugee status and mental illness
- Clinical Experience: Interned in the General Counsel's Office of the Joslin Diabetes Center
- Graduation Thesis: Islamic Banking and Finance in the United States

UNIVERSITY OF MICHIGAN | Ann Arbor, MI
**Master of Public Policy**

- Concentrations: Foreign Policy, Quantitative Analysis, and Public Administration
- Co-authored consulting paper for the US Navy on change management

UNIVERSITY OF WASHINGTON | Seattle, WA
**Bachelor of Arts in Law, Society and Justice**

- Awarded diplomacy fellowship by the Department of State, which included two summer-long training academies on foreign relations, policy and data analysis, and leadership
- Studied abroad in Cairo, Egypt for three semesters

## COMMUNITY SERVICE and OTHER ACTIVITIES

**Current Roles:**

- **Washington State Bar Association (WSBA)** - *District 10 Governor | 2022 to Current | Treasurer | Current*
- **Family Support Center of South Sound** – *Member of the Board of Directors & Treasurer | Current*
  Olympia, WA area's largest non-profit serving homeless families
- **The Judicial Institute –** *Treasurer | Current*
  Non-profit organization dedicated to diversifying Washington State's judiciary
- **Commission on Asian and Pacific American Affairs** – *Commissioner | 2017 – 2024 | Chair | 2020 – 2023*

**Past Leadership Roles**

- **Boys and Girls Scouting -** *Scoutmaster and Troop Leader | 2007 – 2017*
  Volunteered for scouting programs in Boston, Houston and Washington State
- **Washington Leadership Institute (WLI)** – *Fellow | Class of 2017*
  University of Washington Law School's and WSBA's leadership program for young attorneys
- **Washington Immigrant Network** - *Past Chair | 2020 – 2021*
  Statewide business resource group for immigrant Washington State workers.
- **Tumwater Planning Commission** – *Member | 2018 to 2022.*
- **WSBA Diversity Committee/Council** – *Member | 2017 to Current | Chair | Current*
- Member of the Washington State Governor's Working Group on Poverty and the Washington State Legislative Poverty Reduction Taskforce from 2018 to 2024

**Additional Qualifications**

- **Language**: Fluent in Vietnamese
- **Bar Admission**: Active - Washington State; Inactive - Massachusetts, New York, Texas

Sunitha Anjilvel
[redacted]
Redmond, WA 98052
[redacted]

April 6, 2026

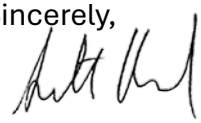
To Whom it May Concern,

It is with unbridled enthusiasm that I write this letter recommending Nam Nguyen for presidency of the Washington State Bar. I have known Nam for seven years through my work with the WSBA DEI Council and the WSBA Board of Governors, and my current role of Immediate Past President. I am so excited that Nam is stepping up to an opportunity to assume the role of President. Were he to become President it would be a win for WSBA, the legal community at large and the entire state.

What makes Nam an excellent fit for this role is the wealth of his knowledge and experience in statewide policy and law. His experience includes leadership positions at WSBA including roles as Co-Chair of the DEI Council, Treasurer of the Board of Governors and numerous chair ships of WSBA's important committees and councils. Nam has demonstrated time and time again not only the depth of his knowledge but also his singular ability to harness that knowledge for the benefit of any entity he leads.

Nam has a thoughtful, calm, effective leadership style. He is always willing to listen and actually hear different sides of a particular issue, and he is able to build bridges and unite rather than divide. He has helped shape a culture of respect and civility within the Board of Governors and I have no doubt that under his leadership the Board will continue to flourish and grow.

Sincerely,



Sunitha Anjilvel

WASHINGTON STATE BAR ASSOCIATION

# President-elect Application Form

## INSTRUCTIONS

1) Complete this application form. If you are nominating someone else, ask them to sign it below and submit it along with the required attachments.
2) Other Materials:
    - Statement of Interest
    - Resume
    - Letters of Support (may be submitted individually)
3) Sign, scan and email the signed form and attachments to barleaders@wsba.org. **Applications must be received by 5 p.m. PST on Tuesday, April 7, 2026. Late materials will *not* be accepted.**
4) Letters of support, if any, can be sent directly to barleaders@wsba.org by the author.

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

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

| Nam Nguyen | 47402 |
|---|---|
| Name of candidate (please print) | WSBA Bar # |

Signature of Candidate

Signature of Nominator (if relevant) WSBA Bar #

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

**This form must be filed in the Office of the Executive Director of the WSBA no later than 5 p.m. PST on April 7, 2026. Filing may be accomplished by emailing the form and attachment(s) to barleaders@wsba.org.**

WASHINGTON STATE BAR ASSOCIATION

**TO:** Board of Governors

**FROM:** Terra Nevitt, Executive Director

Paris Eriksen, Manager of Volunteer Engagement

**DATE:** April 8, 2026

**RE:** WSBA Board of Governors Congressional Districts and President-elect Interview & Appointment Process

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**ACTIONS:**

- Elect the Congressional District 7 North Governor for a one-year term.
- Elect the Congressional District 8 Governor for a one-year term.
- Elect the Congressional District 2 Governor for a two-year term.

**Summary**

The Board of Governors is asked to elect individuals to fill four positions on the board. The relevant information, candidate materials, interview and voting processes are described below.

*Congressional District 7 North and Congressional District 8*

The WSBA received no applications by the original deadline for these two positions (February 17, 2026). In accordance with the Bylaws, when no application is made for a seat, the Board will appoint the position until the next election cycle.

Therefore, the application deadline was extended to April 7 and recruitment continued through additional eblast communications, information sessions and other outreach. WSBA received applications from the following individuals:

Congressional District 7 North

- Norma Linda Ureña
- Alexander Wisbey

Congressional District 8

- Timothy E. Allen
- Julie K. Fowler
- Brian F. McMahon
- Aaron Richter
- Makan Shetabi
- Qian Ying

The term for the Congressional District 7 North and Congressional District 8 positions will be for one year beginning at the conclusion of the final regularly scheduled BOG meeting of the fiscal year (September 2026) through to the conclusion of the same meeting the following year (likely September 2027).

*Congressional District 2*

President-elect Kari Petrasek has resigned her Congressional District 2 position effective at the conclusion of the September 2026 Board meeting. The application deadline for this position was April 7. WSBA received applications from the following individuals:

- Peter H. Arkison
- Min K. Kang
- Kenneth Zirkman

In accordance with the WSBA Bylaws, if a vacancy occurs with more than 12 months remaining, the Board elects a candidate to complete the term until the next election for that position. Therefore, the term for the Congressional District 2 positions will be for two years beginning at the conclusion of the final regularly scheduled BOG meeting of the fiscal year (September 2026) through to the conclusion of the same meeting the following year (likely September 2028).

**Interview Process**:
Candidate interviews will take place on Friday, May 1. The candidates will be interviewed in public session and permitted fifteen minutes total for self-introduction and to answer questions. Governors may use the pool of interview questions provided but are not limited to these questions and may ask others should time permit.

**Voting Process**:

The election will be conducted through a secret electronic ballot. After all interviews, Board members will be asked to indicate their choices for all three positions through the e-ballot. All votes will remain secret and made available only to three persons appointed by the President, one of which will be the Executive Director. Results will be announced immediately following the election.

**Relevant WSBA Bylaws**:

*IV.4.B(2)*
*If a vacancy occurs due to resignation, death or removal of a Governor by the BOG, and more than 12 months remain in the Governor's term, the BOG must elect a candidate eligible for that position to serve as Governor until the next regularly scheduled election for that Governor position.*

*IV.4.B(4)*
*In the event no application is made for a seat, the position will be treated, advertised, and filled by Board appointment until the next election cycle only, in which the position will be included in the election cycle for the remainder of the term.*

**Attachments**:

Pool of Interview Questions
Congressional District 7 North, candidate materials, redacted
Congressional District 8, candidate materials, redacted
Congressional District 2, candidate materials, redacted

WASHINGTON STATE BAR ASSOCIATION

## Pool of Interview Questions

*Updated April 2026*

*Background*

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

*Interest and Commitment*

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

*Skills and Expertise*

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

*Current Topics and Member Engagement*

13. WSBA's goals span governance, public service, technology and equity. Which goal do you think will be the most challenging for the Board to advance and why?
14. What do you see as the biggest technology-related opportunities and risks for the legal profession, and how can WSBA help members navigate them?
15. What does effective, transparent governance look like to you, and how would you help the Board strengthen trust and accountability?
16. How could you serve as a link between the organization and the legal community?
17. How should WSBA balance innovation with its responsibility to protect the public?
18. What emerging or persistent barriers to legal access do you see in Washington, and how should WSBA respond?
19. What does a culture of belonging within the legal profession mean to you, and how should WSBA and the Board help cultivate it?
20. How do you think WSBA can better support communities historically underrepresented in the legal profession?

My name is Norma Linda Ureña, and I am a proud member of the Washington State Bar Association. I grew up working in the sugar beet and potato fields of Southern Idaho, where I learned the value of hard work, perseverance, and service. Those early lessons, combined with a deep sense of justice, have shaped my legal career and commitment to our profession.

I practice family law in King, Pierce, and Snohomish Counties. Before focusing exclusively on family law and domestic violence cases, I served clients through Idaho Legal Aid, the Northwest Justice Project, and Columbia Legal Services. I have also contributed to the profession through service on WSBA committees, including the Disciplinary Committee and Judicial Evaluation Committee.

Beyond the practice of law, I am committed to community engagement and have served with organizations such as the Jackson Street Music Project and the Latino Community Fund. I believe lawyers have both the ability and responsibility to advance justice beyond our individual practices.

I would be honored to serve as a Governor for District Seven-North and welcome your ideas, concerns, and vision for the future of our Bar. Thank you for your consideration.

**EXPERIENCE:**

***Amaya Family Law* (June 2024-present) Bellevue Washington.** 100% Family Law practice *(RCW 26.09 and RCW 7.05 previously RCW 26.50); (King and Pierce County) (Temporary Orders' Parenting Plans; Orders of Child Support; Asset/Debt Property Distribution; Relocation; Adequate Cause; Parenting Plan Modifications; Disestablishment of Parentage; Child Custody; Restraining Orders; Domestic Violence Protection Orders; Anti-Harassment; Orders to Show Cause/Contempt; Spousal Maintenance; and Attorney Fees in matters of Dissolution of Marriage; Legal Separations)*

- Objectively identify, analyze and interpret legal issues, principles and arguments in complex family law litigation; draft concise and professional pleadings;
- Communicate effectively and efficiently in oral motion hearings; present professional and effective courtroom decorum for successful outcomes.

***Wechsler Becker, LLP*, (October 2020-June 2024) Seattle Washington.** 100% Family Law practice *(RCW 26 and RCW 26.50); (King, Snohomish and Pierce County) (Temporary Orders' Parenting Plans; Orders of Child Support; Asset/Debt Property Distribution; Relocation; Adequate Cause; Parenting Plan Modifications; Disestablishment of Parentage; Child Custody; Restraining Orders; Domestic Violence Protection Orders; Orders to Show Cause/Contempt; Spousal Maintenance; and Attorney Fees in matters of Dissolution of Marriage; Legal Separations)*

- Objectively identify, analyze and interpret legal issues, principles and arguments in complex family law litigation; draft concise and relevant legal analysis;
- communicate effectively and efficiently in oral motion hearings; present professional and effective courtroom decorum for successful outcomes. E-File using KCScript.
- Successfully arbitrated a complex financial post-dissolution matter through 2 appeals (reconsiderations and appeal to superior court).

***Ureña Law Offices, PLLC, (January 2002-October 2020). Seattle, Washington.*** Family Law (95%) and Wage Claim (5%) Practice*. (RCW 26 et al; and RCW 26.50); (King, Snohomish, Skagit, Island, Pierce, Thurston, Kitsap) Temporary Orders' Parenting Plans; Orders of Child Support; Asset/Debt Property Distribution; Adequate Cause; Parenting Plan Modifications; Determination of Parentage; Disestablishment of Parentage; Child Custody; Restraining Orders; Domestic Violence Protection Orders; Orders to Show Cause/Contempt; Spousal Maintenance; Attorney Fees in matters of Dissolution of Marriage; Legal Separations; Declaration of Invalidity pursuant to*

- Objectively identify, analyze and interpret legal issues, principles and arguments in complex family law litigation; communicate effectively and efficiently in oral motions arguments; draft and write pleadings in a concise and professional manner; effectively handle and balance the pressures from clients; present professional courtroom decorum and present in an effective manner for success.
- Proficiently use court-based technology programs, including KC Script to E-File. Managed a high volume family law caseload efficiently and effectively.
- Successfully litigated an Invalidity case receiving impressive findings at trial for my client;
- Appointed as the LEGAL ADVISOR TO THE MEXICAN CONSULATE (2002 to 2007) to represent Mexican nationals in civil matters.
- Regular appearance on TV and radio programs to provide legal information to the public in King County, Snohomish County and Skagit County.

***Columbia Legal Services* (February 2001-January 2002). Seattle, Washington.** 50% Family law (domestic violence), 25% education and 25% employment. Co-authored amicus brief to the Washington State Supreme Court on uncompensated meal and rest breaks. Successfully co-managed a child support legal clinic. Organized a low-wage worker to strategize solutions. Advised parents on educational legal issues. Participant in proposed rulemaking for child support issues. Co-founder of 245(i) Coalition providing outreach to the entire state of Washington on immigration law. Outreach efforts recognized nationally by American Immigration Lawyers Association.

***Northwest Justice Project* (November 1996-February 2001). Seattle Washington/Pasco Washington**
Held two positions: Seattle and Pasco. **(Seattle)** Conducted 15 client consultations per day for the state-wide CLEAR network. (Family law, employment and poverty law); Drafted legal briefs for pro se litigants as needed. Served as the farmworker attorney representative for the Seattle/King County office. Coordinated legal education segment for Spanish language radio stations. **(Pasco)** (50% Family law, employment and poverty law) Managed office, supervised support staff and attorney. Represented clients in bilingual education, employment, family law, civil rights and housing cases. Outreach in Eastern Washington to farmworkers. Outreach efforts received national award for contribution efforts to the U.S. Housing of Urban Development.

***Idaho Legal Aid Services* (June 1994-October 1996). Idaho Falls, Idaho and Boise Idaho.** Held 2 positions: Idaho Falls and Boise. **Idaho Falls:** 50% family law, 25% employment, 25% poverty law. Developed outreach to

farmworkers in five-county rural area. Successfully advocated the Idaho State Legislature to eliminate the exemption for farmworkers under the Labor and Industries. Successfully litigated a family law trial for the first time. **Boise:** 100% civil rights: Managed a state-wide investigation and testing center for civil rights violations in housing. Trained real estate developers and management companies on federal and state fair housing compliance issues. Recruited and trained "testers" in all Idaho cities. Supervised a panel of over fifty testers and their work across the state of Idaho. Organized legal track for Idaho Hispanic Issues Conference. Appeared on live television show monthly addressing housing legal issues.

**TRIER of FACT**

**WSBA Adjunct Disciplinary Counsel Panel Member (October 2022-September 2027) and (December 2011–September 2016);** Adjudicated a grievance filed by a claimant against a WSBA member appropriately applying the Rules of Professional Conduct.

**Disciplinary Board,** *Washington State Bar Association* **(2007-2010).** Adjudicated over 100 disciplinary cases as part of a board; read voluminous pleadings and participated in hearings/trials as a trier of fact deciding the appropriate disciplinary relief pursuant to the Rules of Professional Conduct exercising appropriate judicial temperament and demeanor.

**Fee Dispute Arbitrator,** *Washington State Bar Association.* **(2003–2008).** Investigated, researched and successfully adjudicated a complaint filed by a claimant regarding the fees charged by a WSBA member in a personal injury case.

**VOLUNTEER and BOARDS**

**Family Law Section Executive Committee Member (October 2013-September 2015)**

**Disciplinary Advisory Round Table Member (October 2019 – September 2024)**

**Coordinator, King County Bar Association's Bilingual Spanish Clinic (August 1999-February 2001**). Managed, coordinated, supervised and trained a panel of forty (40) volunteer attorneys. Doubled the number of volunteer attorneys.

**Washington State Senate Committee Services Intern: (June 1993-September 1993). Olympia, Washington.** Served on Governor's Task Force on Washington's Health Care Reform Plan. Prepared training book for Senators on Health Care Issues facing the Senate.

**International Medical Research Analyst, *University of Washington, Public Health*, Seattle Washington, and Guadalajara, Jalisco Mexico (June-September 1990).** Conducted research on children suffering from malnutrition. Coordinated comparison of contributing factors. Study provided to World Health Organization.

**Enforcement of Lawyer Conduct Task Force,** *Washington State Bar Association,* 2009 - 2011.

**Community Advisory Board,** *Centers for Population Health and Health Disparities.* 2011-2013.

**Jackson Street Music Project,** *Jazz in the City.* 2008-present.

**Judicial Recommendation Committee,** *Washington State Bar Association.* 2002-2008. Chair 2006-2007.

**President,** *Washington State Hispanic Bar Association* 1999-2001.

**Editorial Advisory Committee,** *Washington State Bar Association.* 2003-2005.

**Legislative Committee,** *Northwest Women's Law Center,* 2000-2003.

**Committee for Diversity***, Washington State Bar Association***.** 2000-2001.

**Volunteer Attorney,** *Cross-Cultural Family Law Clinic***,** 1997-1999.

**PRESENTATIONS:**

**Unique Issues Representing Immigrants in Family Law Cases** (2017 Family Law Midyear; Snohomish County Bar; King County Bar; McKinley Irvin; various others)

**Drafting Parenting Plans for non-English speakers,** *Presentation to Superior Court Judges* 2010

**Immigration Issues in Family Law Cases,** *various CLEs* 2010 - present

**Panelist, International aspects of family law: Military and Immigration Issues** *KCBA* 2009

**Humanizing the Immigration Debate** *Seattle University* April 2008

**Do you understand me? Legal, social and cultural issues facing immigrant victims of domestic violence.** *Domestic Violence Conference, Longview, Washington* March 2004

**Access to Justice in the 21st Century: Will Access to Justice in the 21st Century Resuscitate, Shun or Re-Tool Its Historic Fundamental Rights Jurisprudence? Panelist** *WSBA's Symposium.* September 2000

**Welcome Address,** *Seattle University Orientation,* Freshman Class 2002.

**PUBLISHED ARTICLES:**

**No Immigration without Emigration.** *Published in WSBA Bar News January 2007*; re-published in 2007 in *InMotion.org* (human rights online magazine) and also by *CenGage* for college political science reading.

**An Inauguration for All Americans.** *King County Bar News February 2009;*

**EDUCATION:**

Juris Doctor, **University of Washington**, School of Law 1994

Bachelor of Arts: Political Science (International Relations in Middle East), **Seattle University,** 1989

# WASHINGTON STATE BAR ASSOCIATION

## Board of Governors Congressional District - Application Form

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---

| Applicant Information | |
|---|---|
| **Name** | Norma Linda Ureña |
| **WSBA Bar #** | 26770 |
| **Email Address** | [redacted] |
| **Phone Number** | [redacted] |
| **Congressional District Position:** | ☒ District 7 North<br>☐ District 3<br>☐ District 6<br>☐ District 8 |

### Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor from the above indicated district.

Norma Linda Ureña 26770

Name of Candidate (please print) WSBA Bar #

Signature of Nominator (if applicable) WSBA Bar #

Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form

Board of Governors District 7 North

**Candidate Statement for Alexander Wisbey**

I am a Seattle-based litigation partner at Dickson Frohlich Phillips Burgess, PLLC, where I lead and manage a team of attorneys and paralegals handling matters ranging from pre-litigation through trial in both state and federal court. I also advise clients on transactional and regulatory matters, giving me a broad perspective on the challenges facing practitioners across practice settings.

I earned my J.D. from the University of Washington School of Law, where I served as Managing Editor of the Washington Law Review, and hold a Master's degree in International Law and Public Policy. I have been a Washington State Bar member since 2015.

I bring to this role real-world experience in courtrooms, boardrooms, and law firm management. I understand the pressures facing litigators, the needs of small and mid-size firms, and the importance of a bar association that is both accessible and responsive to its members.

If appointed, I am committed to serving the lawyers and legal professionals of District 7 North with transparency, diligence, and a genuine commitment to the WSBA's mission to serve the public and ensure the integrity of the legal profession. I would be honored to earn the Board's confidence.

Alexander Wisbey

# Alexander Wisbey

[redacted] ♦ [redacted] ♦ [redacted]

**Experienced trial attorney with a demonstrated history of working in both law firms and as in-house counsel. Master's degree in international law and pnblic policy. Currently leading the litigation department for my firm's Seattle office and managing a team of three other attorneys and three paralegals, while also advising clients in transactional and regulatory matters.**

Highlighted First Chair Trial Results and Settlements:

- Plaintiff proposed award of $23,000,000.00. I proposed award of $12,000.00. Jury awarded $12,000.00.
- Plaintiff proposed award of $120,000.00. I proposed award of $6,000.00. Jury awarded $4,000.00.
- Plaintiff proposed award of $141,500.00. I proposed a defense verdict. Jury awarded a defense verdict.
- $3,500,000.00 personal injury settlement.

## Legal Experience

***Dickson Frohlich Phillips Burgess, PLLC*, Partner** **2020 to present**

I am currently a partner at a medium size Seattle law firm specializing in real estate related matters and general civil litigation. I am responsible for managing 75 to 125 cases from pre-litigation to trial in both state and federal court. I also manage three attorneys and three paralegals—as well as general management of the Seattle office. In addition to my work as a litigator, I advise individual and corporate clients on a wide range of transactional and regulatory matters.

***Cole | Wathen | Leid | Hall, P.C.*, Attorney** **2018 to 2020**

I previously worked as an attorney at a medium size Seattle law firm specializing in first and third-party insurance defense. I was responsible for managing 20 to 25 cases from pre-litigation to trial in both state and federal court. I had the opportunity to take several cases to trial and have extensive negotiation experience.

***Law Offices of Sweeney & Dietzler*, Attorney** **2017 to 2018**

I previously worked as in-house litigation counsel for a national insurance company. In that role, I handled 15 to 20 of my own cases at all times and I regularly appeared on behalf of other attorneys at my office—at depositions, mediations, arbitrations, and trials.

***Floyd, Pflueger & Ringer, P.S.*, Attorney** **2015 to 2017**

Following law school, I worked as an associate at a medium size Seattle law firm specializing in civil litigation defense. I was responsible for defending cases from pre-litigation to trial with a dedicated team of attorneys and support staff. I also worked with dozens of medical providers to navigate through Washington's Quality Assurance Commission process.

## Bar Admission

**Washington State**, 2015

## Education

**University of Washington School of Law**, Seattle, WA Juris Doctor, June 2015

*Select Activities: Washington Law Review* Managing Editor | *Moot Court Honor Board* Member | *Vis International Commercial Arbitration Moot* Team Member | Provost's Graduate and Professional Student Fellow | University Disciplinary Committee Graduate Student Representative

*Select Honors:* Mediation Finalist | Mediation Second Place Speaker Award Winner | Peterson, Wampold, Rosato, Luna, & Knopp 2L/3L Mock Trial Competition Chair | Hillis, Clark, Martin, & Peterson 1L Appellate Advocacy Semifinalist | Contract Negotiation Semifinalist | 1L Mock Trial Semifinalist

**Internships and Work During Law School**

*Phillips Law Group*, Law Clerk, 2014 to 2015 | *King County Prosecuting Attorney's Office*, Legal Intern, 2015 | *MultiCare Health Systems*, Law Clerk, 2014 | *Washington State Health Care Authority*, Legal Intern, 2013

**The American University of Paris**, Paris, FR

Master's of Arts Public Policy and International Law *summa cum laude,* July 2012

*Select Activities:* University of Oxford "International Human Rights Law" Program | Senate Judiciary Chair

**La Sierra University,** Riverside, CA
Bachelor of Arts in Management *summa cum laude* University Honors Program, June 2011 Bachelor of Arts in History *summa cum laude* University Honors Program, June 2011
*Selected Honors:* La Sierra University Outstanding Undergraduate Senior of the Year in History for 2011 | La Sierra University Judicial Senator of the Year 2007 and 2008 | Student Honors Council Chair and Member | Academic Integrity Committee Representative | La Sierra University Judicial Senator | Certificate for Basic Mediation Skill Training

## Non-Legal Experience

***La Sierra University,* Resident Assistant** **2009 to 2011**
Served as both mentor and administrator, planned social events, performed room checks, mediated and resolved disputes.

***La Sierra University,* Student Director of the *International Visitors Program*** **2007 to 2009**
Attended functions on behalf of the Dean, promoted La Sierra University and the University SIFE Team, escorted international visitors through a program with the U.S. State Department, coordinated schedules, basic office duties.

***Regency Pacific,* Personal Aide to James Clay, President of *Regency Pacific*** **2007 and 2009**
Shadowed Mr. Clay, provided analysis concerning healthcare trends, prepared for meetings, scheduled appointments, provided ideas and opinions, designed detailed business plan for alternative fuel car facility.

**International Experiences and Interests**
Languages: French—beginning to intermediate knowledge; Spanish—beginning to intermediate knowledge
Extensive international experience in Europe, the Americas, the Pacific, Africa, Asia and the Middle East
Interests: spending time with my wife, cooking, television, water sports, traveling, *Star Wars,* bartending, and hiking

**References**
Available upon request

# WASHINGTON STATE BAR ASSOCIATION

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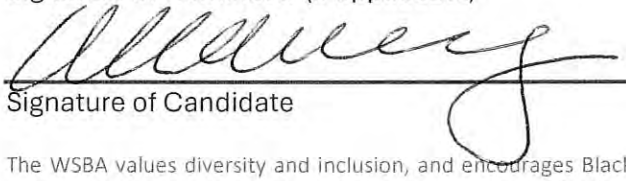
| Applicant Information | |
|---|---|
| **Name** | Alexander James Randal Wisbey |
| **WSBA Bar #** | 49696 |
| **Email Address** | awisbey@dfpblaw.com |
| **Phone Number** | [redacted] |
| **Congressional District Position:** | District 7N |

### Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor from the above indicated district.

Alexander Wisbey — 49696
Name of Candidate (please print) — WSBA Bar #

Signature of Nominator (if applicable) — WSBA Bar #



Signature of Candidate — 4/7/26

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on April 7, 2026. Filing may be accomplished by emailing the form to barleaders@wsba.org. For questions, please email barleaders@wsba.org.

I am pleased to apply for the open District 8 position on the Board of Governors. I would be honored to enhance my volunteerism with the WSBA by serving in this position.

My background is detailed in the attached resume. I came to the law as a second career, after being a Professor of Political Philosophy for sixteen years. I entered the University of Washington School of Law in 2001 at age 41. I was hired as a medical negligence defense associate at Bennett Bigelow & Leedom, PS, in Seattle out of law school. After five years I made partner, and I remained at BB&L for seven years. I then formed a law firm with two partners which continued to provide medical negligence defense work for another seven years. In 2024 I formed my own law firm where I continue to practice medical negligence defense as well as having an active plaintiff practice. I am a trial lawyer by trade.

I am in my second five-year term as Adjunct Disciplinary Counsel to the ODC. I am also serving as the APR 6 Tutor to my daughter at my law firm who is in the first year of the program.

# Timothy E. Allen

Allen & Associates Law

2025 112th Avenue NE, Suite 101
Bellevue, Washington 98004
206.401.9193
tallen@allenassociateslaw.com

Tim is a seasoned trial lawyer and is regularly recognized as a Washington Super Lawyer, an honor limited to the top 5% of attorneys in Washington. He is respected for his ability to navigate complex litigation on both sides of the bar. He represents defendant healthcare providers in medical negligence cases, but also represents plaintiffs in significant personal injury, civil rights, and insurance coverage/bad faith actions. Tim is licensed to practice in Washington and Oregon and represents clients in both state and federal courts.

**DEFENSE**

As a defense attorney, Tim has obtained defense verdicts, dismissals, and favorable settlements for clients including health care providers in over twenty-five different specialties, hospitals, clinics, employers, universities, product manufacturers, building contractors, insurance brokers, and insurance companies. Tim also represents healthcare providers in licensing proceedings. As examples, Tim has defended clients in the following medical specialties:

- Cardiac Surgery
- Cardiology
- Emergency Medicine
- Emergency Medical Services/Transport
- Gastroenterology
- General Surgery
- Hematology
- Internal Medicine
- Interventional Radiology
- Neurology
- Neuroradiology
- Neurosurgery
- Nursing
- Obstetrics/Gynecology
- Oncology
- Orthopedic Surgery
- Pediatrics
- Physician Assistant — Certified
- Plastic Surgery
- Primary Care
- Psychiatry
- Psychology
- Pulmonology
- Radiology
- Rehabilitation Medicine

**PLAINTIFF**

When representing plaintiffs, Tim has helped achieve multi-million-dollar verdicts and settlements in product liability and insurance bad faith actions. He has successfully resolved through trial or settlement cases alleging breach of contract, professional negligence, sexual assault and abuse, personal injury, and property damage arising from motor vehicle accidents. He has also obtained forms of non-monetary relief in a wide variety of contexts. Examples of plaintiff cases on which Tim has either served as lead counsel or assisted on the trial team include the following:

- $15.5 million product liability verdict in Federici v. U-Haul et al.
- $12.95 million bad faith settlement in Howard v. Royal Specialty Underwriting, Inc.
- $4.4 million settlement in midst of trial in coverage action against excess insurer
- $1.5 million summary judgment recovery in breach of surety action arising from purchase of hospital facility
- $700,000 settlement on behalf of victim of arrow shot into and retained in head
- $600,000 verdict in breach of contract action against Port of Tacoma
- $334,000 judgment entered in action regarding ownership of retired racehorse
- $333,000 settlement with police department for civil rights lawsuit alleging wrongful death where victim killed within 78 seconds of contact with officers
- $188,500 UIM policy limits recovery without necessity of filing lawsuit
- $100,000 UIM policy limits recovery without necessity of filing lawsuit
- Confidential settlement on behalf of victim of sexual and physical assault
- Confidential settlement obtained on behalf of academic institution against insurance broker
- Confidential settlement in accounting malpractice action
- Confidential settlement with professional sports team for personal injury sustained on premises
- Successful action to change ballot measure title resulting in defeat of ballot measure
- Obtained permanent injunction against release by state agency of client's proprietary trade secrets to unsuccessful contract bidder
- Successful return to rightful owners of property wrongfully taken or detained by others, including patient medical records as well as valuable horses
- Obtained temporary restraining order excluding former patient from premises of healthcare clinic
- Successfully settled claim for contractual and equitable indemnity where hospital sued for actions of contracted physicians

**PERSONAL**

Prior to becoming a lawyer, Tim was a professor of political philosophy and argumentation at Western Washington University, as well as the director of the university's debate program. During law school, Tim served as a Rule 9 Attorney for the Whatcom County Public Defender. Tim is currently serving his second five-year term on the WSBA's Adjunct Disciplinary Counsel Panel, which assists the WSBA's Office of Disciplinary Counsel. Tim is married, owns dogs and horses, lives in Duvall on a shy ten acres, and takes immense pleasure in working with and mentoring his daughter Lolita, a paralegal at A&A Law. When he was younger, he worked his way through college as a professional musician, and spent almost twenty years as a fanatical mountain climber before grinding his knees into dust. He finally figured out it was easier to get into the mountains on horseback.

**LEGAL CAREER**

- Owner and Sole Partner, Allen & Associates Law PLLC, Bellevue, Washington (12.1.2024-Present)
- Partner, Mullin, Allen & Steiner, PLLC, Seattle, Washington (2.1.2017-11.30.2024)
- Partner, Bennett Bigelow & Leedom, P.S., Seattle, Washington (1.1.2010-1.30.2017)
- Associate, Bennett Bigelow & Leedom, P.S., Seattle, Washington (10.21.2004-12.31.2009)

**EDUCATION**

- University of Washington School of Law, J.D. with honors, 2004 (Law Review, Moot Court Board)
- Boston University, A.B.D., Political Philosophy, 1986
- Western Washington University, M.A. with Distinction, Political Science, 1983
- Western Washington University, B.A., Cum Laude**,** Political Science, 1981

**ADMITTED TO PRACTICE**

- Washington
- Oregon
- United States Court of Appeals for the Ninth Circuit
- United States District Court for the Western District of Washington
- United States District Court for the Eastern District of Washington

**PUBLICATIONS**

- "The Foreseeability of 'Transference': Extending Employer Liability Under Washington Law for Therapist Sexual Exploitation of Patients," *Washington Law Review,* 78:2 (2003)

WASHINGTON STATE BAR ASSOCIATION

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| Applicant Information | |
|---|---|
| **Name** | Timothy E. Allen |
| **WSBA Bar #** | 35337 |
| **Email Address** | tallen@allenassociateslaw.com |
| **Phone Number** | 206.401.9193 |
| **Congressional District Position:** | ☐ District 2<br>☐ District 3<br>☐ District 6<br>☒District 8 |

## Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor from the above indicated district.

Timothy E. Allen — 35337

Name of Candidate (please print) — WSBA Bar #

Signature of Nominator (if applicable) — WSBA Bar #

*s/Timothy E. Allen*

Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on April 7, 2026. Filing may be accomplished by emailing the form to barleaders@wsba.org. For questions, please email barleaders@wsba.org.

JKF | Julie K. Fowler
ATTORNEY AND COUNSELOR AT LAW

April 7, 2026

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

Re: 8th District Candidate Statement for Julie K. Fowler

To Whom It May Concern:

I am applying for the governor position for the 8th District. I have been a practicing attorney for twenty-six years. I am in good standing with the bar. I operate a solo practice in Bellevue, Washington handling primarily family law and estate planning matters. I serve on the WSBA Solo and Small Practice Section Executive Committee as well as volunteer for other state bar activities. I serve on the King County Bar Association's Judicial Evaluation Committee.

I have served on various bar committees and bar leadership roles both within the WSBA and in local bar associations. I serve on the judicial evaluation committee because it vets the judges running for and being appointed to the State Supreme Court. Those judges preside over the state bar association. Governance of attorneys in Washington is important to me. Bar leadership is about improving the support and flourishing of attorneys which is also important to me.

I have worked successfully with other bar leaders. I want to represent myself and other lawyers in this association. I have years of litigation practice, law office management, bar volunteer service and professional relationships within and without the WSBA to be an asset to the board of governors.

Respectfully,

Julie K. Fowler

14205 SE 36th Street, Ste 100, Bellevue, WA 98006
Phone (425) 990-9975 Facsimile (425) 451-2687
julie@juliefowlerlaw.com

**Julie K. Fowler**
14205 SE 36th Street, Ste 100, Bellevue, WA 98006
(o) 425-990-9975 – (c) 206-617-3043
julie@juliefowlerlaw.com

**Attorney at Law** Law Office of Julie K. Fowler, P.S. October 2000 – present

**Admitted** Washington State, US District Court for the Western District of Washington

## General Legal Experience

- Family Law, Civil, Estate Planning/Probate legal practitioner and litigator for twenty six years
- Former deputy prosecuting attorney for the King County Prosecutor's Office under Rule 9
- Published articles in the ABA's GPSolo Magazine and the King County Bar Bulletin
- Speaker at continuing legal education seminars for the Washington State Bar Association, King County Bar Association, Wyoming State Bar Association and American Bar Association.
- Speaker at University of Washington and Seattle University Law Schools, and National Association of Insurance and Financial Advisors
- Recipient of the King County Bar Association Young Lawyer's Division Outstanding Mentor Award (2009)
- Community Partner Award from Northwest Family Life for work with domestic violence victims

## Noteworthy Cases

*Cowan v. Cowan* 540 P.3d 158 (2023)
*Marriage of Laidlaw*, 2 Wash. App. 2d 381, 409 P.3d 1184 (1018)
*Fowler v. Olver,* 168 P.3e 348, 161 Wn.2d655

## Association Memberships and Positions Served

**Washington State Bar Association:** Family Law and Solo and Small Practice Sections (Past President and Past & Current Executive Committee Member of the SSPS);
**King County Bar Association:** (Current Member of the Judicial Evaluation Committee, Past Trustee, Past Young Lawyer Division Trustee);
**Domestic Relations Attorneys of Washington**
**East King County Bar Association:** (Past President and Trustee);

WASHINGTON STATE BAR ASSOCIATION

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---

| Applicant Information | |
|---|---|
| **Name** | Julie K. Fowler |
| **WSBA Bar #** | 30108 |
| **Email Address** | julie@juliefowlerlaw.com |
| **Phone Number** | 425-990-9975 |
| **Congressional District Position:** | ☐ District 2<br>☐ District 3<br>☐ District 6<br>☒ District 8 |

## Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor from the above indicated district.

Julie K. Fowler — 30108

Name of Candidate (please print) — WSBA Bar #

Signature of Nominator (if applicable) — WSBA Bar #

Signature of Candidate

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April 7, 2026

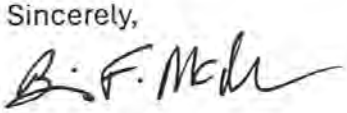
Board of Governors
Washington State Bar Association
1325 Fourth Ave., Suite 600
Seattle, WA 98101-2539

Dear Members of the Board of Governors:

**Re:** Candidate Statement of Brian F. McMahon, District 8

I am interested in serving on the WSBA Board of Governors as the District 8 Governor because I understand there has been limited interest in this position, and I want to ensure the Board has the option of selecting a qualified and committed applicant who is prepared to serve—at minimum—for the first year of the term. If appointed, I will approach this responsibility as a public trust: listening carefully to members in District 8, engaging respectfully with colleagues across the state, and contributing thoughtfully to the Board's policy, leadership, and oversight work. I believe strongly in public service and in the obligation to serve honorably, with diligence and full commitment. If selected, I will be prepared to devote the necessary time and attention to the work of the Board, participate fully in meetings and related responsibilities, and uphold the mission of the WSBA to serve the public and the members of the Bar.

Sincerely,



Brian F. McMahon
WSBA No. 45739
[redacted]
bfmcmahon@gmail.com

Brian F. McMahon
[redacted] | bfmcmahon@gmail.com | www.linkedin.com/in/bfmcmahon

**WORK EXPERIENCE:**

In-House Counsel Experience:

*Microsoft Corporation* — *Redmond, WA*
Senior Copyright Counsel, Intellectual Property Group — March 2024-Present

- Counselor/Advisor: Provide guidance and opinions on domestic and international copyright law to various products and services teams located globally; provide informed briefing to senior leadership on issues pertaining to developing copyright law as applied to artificial intelligence.
- Subject Matter Expert: Serve as designated team subject matter expert on all matters relating to competitive intelligence, trade secrets, and confidential/proprietary information; develop and deliver presentations relating to same
- Service Advocate: Serve on Leadership Committee for "DICE" (Disability In Corporate, Executive, and legal affair group); develop and drive community partnerships between Microsoft and disability-rights groups throughout Washington.
- Community Leader: Co-Lead of Microsoft's Disability Inclusion in CELA (Corporate, External, & Legal Affairs) Employee Network, a volunteer disability-inclusion network open to all employees dedicated to building community, promoting awareness and education, and improving accessibility for all disabled community members.

Law Firm Experience:

*Christensen O'Connor Johnson Kindness, PLLC* ("COJK") — *Seattle, WA*
Non-Equity Member, Litigation Group Vice Chair — April 2012-February 2024

- Counselor/Advisor: Provided guidance and opinions, both formal and informal, to COJK Executive Committee and Managing Partners on various matters including but not limited to conflicts of interest, professional ethics, statutory and regulatory interpretation, contract interpretation, contract negotiations, labor and employment law, DEIA initiatives, intellectual property enforcement and transfer, resource and asset distribution, training, management, and leadership.
- Team Leader: Served as Vice Chair of COJK Litigation and Conflicts Group to successfully manage and advance all active Group matters to resolution; assumed and executed all internal direct report responsibilities to COJK Executive Committee and external direct report responsibilities to designated client liaisons; supervised and mentored junior attorneys and staff.
- Problem Solver: Established COJK's Alternative Dispute Resolution Group and successfully mediate third-party intellectual property disputes; served as Rule 39.1 Neutral for the U.S. District Court for the Western District of Washington and its ADR Program.

*Morrison & Foerster, LLP* — *Los Angeles, CA*
Senior Associate, Litigation — April 2010-April 2012
Junior Associate, Litigation — January 2006-July 2007
(Break in tenure due to family medical circumstances requiring temporary relocation)

- Dedicated Team Member: Served in support of dynamic and fast-paced litigation team to provide factual diligence, legal research, memoranda, trial briefs, appellate briefs, deposition outlines and preparation materials. Orchestrated large-scale, long-term document review project to manage and supervise attorney-review team comprised of over 60 attorneys across several states and various remote locations.
- Motivated Advocate: Co-founded firm's Pro Bono Program for Displaced Disabled Veterans, focused on assisting displaced veterans with obtaining disability benefits.

*Alston & Bird, LLP* — *Charlotte, NC*
Associate, Litigation — July 2007-March 2010

- Proactive Contributor: Developed highest annual book of business in class (over $500,000/year) while supporting a variety of federal district court, appellate court, and administrative proceedings.

*Latham & Watkins, LLP* — *Los Angeles, CA*
Junior Associate, Patent Litigation — October 2004-January 2006

Government/Non-Profit Experience:

*West Point Association of Graduates* ("WPAOG") *Remote/Seattle, WA*
Advisor to the Board of Directors, WPAOG January 2014-December 2016

- Class Representative: Competitively selected as Class Representative for the Class of 1996 to serve a three-year term as Advisor, Ethics Committee, WPAOG. Responsible for providing Board of Directors with informed opinions pertaining to charitable gifts/donations, conflicts, and corporate governance.

*U.S. Court of Appeals for the Federal Circuit* *Washington, DC*
Law Clerk for then-Chief Judge H. Robert Mayer September 2003-September 2004

- Senior Law Clerk: Served one-year term as senior law clerk to assist chambers with matters pertaining to patent law, government contracts/procurement, veterans' benefits decisions, civil service termination decisions, and other issues arising from the Court's exclusive statutory appellate jurisdiction.

Military Service Experience:

*United States Army* *Various Locations*
Second Lieutenant June 1996-October 1997

- Honorably Discharged Veteran: Received medical discharge prior to graduating from Armor Basic Course; Disability Rating from U.S. Dep't Veterans Affairs: 100%.

Cadet, United States Military Academy June 1992-June 1996

- Distinguished Graduate: Graduated in the top 10% of class; served as Cadet Company Commander; awarded Brigade Soldier of the Quarter distinction.

Private First Class, Airborne Infantry (Spec. Ops.) May 1991-June 1992

- Served overseas in Ranger Company, Long Range Surveillance Detachment.

**EDUCATION:**

Law School: Georgetown University Law Center, J.D. September 2000-May 2003
Undergraduate Studies: United States Military Academy, B.S. June 1992-June 1996

**LICENSES/ADMISSIONS/CERTIFICATIONS:**

State Bar Memberships: New York, California, Washington (active); North Carolina (inactive).
Federal Court Admissions: U.S. Supreme Court; U.S. Court of Appeals for the Ninth Circuit; U.S. Court of Appeals for the Federal Circuit; U.S. District Court for the Western District of Washington; U.S. District Court for the Northern District of California; U.S. District Court for the Central District of California; U.S. District Court for the Southern District of California; U.S. District Court for the Eastern District of California.

**SELECT PUBLICATIONS/PRESENTATIONS:**

- "Copyright in the Age of AI: Navigating New Frontiers,"CenterForce IP Strategy Summit; panelist (Seattle, WA April 2025).
- "Defining Moments in AI Copyright Litigation," AI, Big Data, and Cloud Conference; panelist (Seattle, WA November 2025)
- "The status of willful infringement jurisprudence in the aftermath of *SRI v Cisco*," Washington State Patent Law Association; panelist (Seattle, WA January 2022).
- "Ethics for Patent Practitioners," National Association of Patent Practitioners, Annual Meeting & Conference (Seattle, WA July 2019).
- "Intellectual Property: From Fundamentals to Enforcement," Seattle University School of Law, Summer Practice Academy (Seattle, WA, July 2015 and July 2017).
- "The Biologics Price Competition and Innovation Act of 2009: Legislative Imprudence, Patent Devaluation, and the False Start of a Multi-Billion Dollar Industry," *Kentucky Law Journal*, Vo. 100, No. 3 (2011-2012).

**PRO BONO:**

- Advocate, Qualified Suitable Representative, Developmental Disabilities Advocacy Project, Northwest Justice Project (2025 to Present)
- Volunteer Member, WSBA Judicial Recommendation Committee (2025 to Present)

# WASHINGTON STATE BAR ASSOCIATION

## Board of Governors Congressional District - Application Form

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| Applicant Information | |
|---|---|
| **Name** | Brian F. McMahon |
| **WSBA Bar #** | 45739 |
| **Email Address** | bfmcmahon@gmail.com |
| **Phone Number** | [redacted] |
| **Congressional District Position:** | ☐ District 2<br>☐ District 3<br>☐ District 6<br>☒ District 8 |

### Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor from the above indicated district.

Brian F. McMahon — 45739
Name of Candidate (please print) — WSBA Bar #

N/A
Signature of Nominator (if applicable) — WSBA Bar #

B. F. McM
Signature of Candidate

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| Applicant Information | |
|---|---|
| **Name** | Aaron Richter |
| **WSBA Bar #** | 41405 |
| **Email Address** | Aaron.richter@lewisbrisbois.com |
| **Phone Number** | 206-876-2958 |
| **Congressional District Position:** | ☐ District 2<br>☐ District 3<br>☒ District 8 |

## Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor from the above indicated district.

Aaron Richter #41405

Name of Candidate (please print) WSBA Bar #

Signature of Nominator (if applicable) WSBA Bar #

/s/Aaron Richter

Signature of Candidate

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WASHINGTON STATE BAR ASSOCIATION

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| Applicant Information | |
|---|---|
| **Name** | Makan Shetabi |
| **WSBA Bar #** | 25989 |
| **Email Address** | patentsecurity@gmail.com |
| **Phone Number** | [redacted] |
| **Congressional District Position:** | ☐ District 2<br>☐ District 3<br>☐ District 6<br>☒ District 8 |

## Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor from the above indicated district.
Makan Shetabi

Name of Candidate (please print) WSBA Bar #

Signature of Nominator (if applicable) WSBA Bar #

*Makan Shetabi*

Signature of Candidate

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## Candidate Statement

As a Bellevue business attorney and resident of Sammamish, I am honored to run for District 8 Governor. As the Founder and Immediate Past President of the Seattle Chinese Bar Association (SCBA), I built a vibrant 501(c)(3) non-profit organization of 130+ members, launching legal seminars and scholarships that continue to thrive under new leadership.

My practice serves the diverse Eastside economy— from startups at the forefront of AI innovation to local artists, musicians, and restaurant owners. This breadth gives me a unique perspective on the evolving technological and practical challenges facing solo and small-firm practitioners today.

Beyond my practice, I am a dedicated community builder. Following the success of the 2025 AAPI Heritage Month Judicial Panel, I am currently collaborating with fellow minority bar leaders to organize the 2026 AAPI Heritage Month Event this May.

On the Board, I will champion access to justice, attorney well-being, and forward-thinking policies. I bring a 'builder’s mindset' and a proven track record of uniting diverse voices to solve complex challenges. Supported by my husband and two children, I am eager to ensure the WSBA remains a supportive, inclusive, and transparent resource for all members. I respectfully ask for your vote.

# WASHINGTON STATE BAR ASSOCIATION

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| Applicant Information | |
|---|---|
| **Name** | Qian Ying |
| **WSBA Bar #** | 50710 |
| **Email Address** | qying@fdlaws.com |
| **Phone Number** | [redacted] |
| **Congressional District Position:** | ☐ District 2<br>☐ District 3<br>☐ District 6<br>☒ District 8 |

### Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor from the above indicated district.

Qian Ying — 50710

Name of Candidate (please print) — WSBA Bar #

Signature of Nominator (if applicable) — WSBA Bar #

Signature of Candidate

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LAW OFFICES OF
PETER H. ARKISON

1722 SUNUP LOOP
BELLINGHAM, WASHINGTON 98226-8289
[360] 671-0300
PETER@ARKISON.COM

April 7, 2026

Board of Governors
Washington State Bar Association
1325 Fourth Avenue, Suite 600
Seattle, WA 98101

Greetings:

Here is my application to fill the vacant position in District 2.

Respectfully submitted,

Peter H. Arkison

Peter H. Arkison

# WASHINGTON STATE BAR ASSOCIATION

## Board of Governors Congressional District - Application Form

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| Applicant Information | |
|---|---|
| **Name** | Click or tap here to enter text. PETER H. ARKISON |
| **WSBA Bar #** | Click or tap here to enter text. 5530 |
| **Email Address** | Click or tap here to enter text. PETER H. ARKISON |
| **Phone Number** | Click or tap here to enter text. 360 671 0300 |
| **Congressional District Position:** | ☒ District 2<br>☐ District 3<br>☐ District 6<br>☐ District 8 |

### Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor from the above indicated district.

PETER H. ARKISON — 5530

Name of Candidate (please print) — WSBA Bar #

Signature of Nominator (if applicable) — WSBA Bar #

Peter H Arkison

Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on April 7, 2026. Filing may be accomplished by emailing the form to barleaders@wsba.org. For questions, please email barleaders@wsba.org.

Statement in Support of Application for Appointment to fill the vacant position in District 2.

Lawyers have long been given a higher status in society. There are number of reasons for this, going back at least as far the Middle Ages. They earned this status because of the services they rendered to the Kings and Queens. They were far better educated than most people of those times.

That status came to the Colonies just a part of society, such as merchants. As the Colonies evolved into a new country, rules of society needed to be established, legislation setting forth property rights and criminal laws. Lawyers were important and had a higher status in society.

Although it was not formally written, the status which lawyers were given required that they provide services to the government and to help society, often at no costs to the person.

In the last 50 years the people began to look at lawyers with less and less as higher in society and more and more as a business.

If I am selected for the Board, I would like to see the Bar Association encourage lawyers to move away from just being a business and back to highly respected members of society

It is a calling not a job.

**APPENDIX**

The following is a listing of published opinions in which I was a party and/or the attorney. Lower court opinions in a case, even though published, are not included. Unpublished opinions, of which there are several, which can be found on the internet, are not included if there is not a book citation. A few of these cases have been cited numerous times in other cases.

Below each citation has a cryptic summary of what the issue was.

**UNITED STATES SUPREME COURT:**

*Executive Benefits v. Arkison,* 573 U.S. 25, 134 S.Ct. 2165 (2014)
(Jurisdictional limitations on Article I Courts)

**WASHINGTON SUPREME COURT:**

*State v. Thompson,* 88 Wash. 2d 546 (1977)
(Criminal law concerning the length of a knife)

*Arkison v. Ethan Allen, Inc.,* 160 Wash 2d 535 (2007)
(Judicial estoppel against a Trustee)

**U.S. COURT OF APPEALS FOR THE NINTH CIRCUIT:**

*In re Pederson,* 875 F.2d 781 (9th Cir. 1989).
Cited in *Ferry v. Sanderfoot,* 111 S.Ct. (1991)
(Avoidance of judicial lien in a divorce)

*In re Gitts, 116 B.R. 174 (9th BAP 1990), aff'd and adopted 927 F.2d 1109 (9th Cir. 1991)*
(Timely perfection of chosen homestead exemption)

*In re Plata,* 958 F.2d 918 (9th Cir. 1992)
(Exemption claim in converted Chapter 12 case)

*In re Madson,* 983 F. 2d 1076 (Table) (9th Cir. 1993)
(Dismissal for failure to prosecute)

*In re Rueter,* 11 F.3d 850 (9th Cir. 1993)
(Voluntary payment to retirement account exempt)

*In re Anderson, 21 F.3d 355 (9th Cir. 1994).*
Cited: Hamilton v. Lanning, 130 S.Ct. 2464 (2010)
(Interpretation of "projected disposable income")

In re Cascade Roads, Inc., 34 F.3d 576 (9th Cir. 1994)
(Federal tax question)

In re Baer, 350 Fed. Appx. 184, (9th Cir. 2009)
(Timeliness of an appeal)

*In re Griffin*, 719 F.3d 1126 (9th Cir. 2013).
(Evidence required to support a motion re: stay)

*Castleman v. Burman*, 75 F.4th 1052 (9th Cir. 2023)
(Appreciation of Property goes to the Trustee)

U.S. BANKRUPTCY APPELLATE PANEL FOR THE NINTH CIRCUIT:

*In re Fuller*, 134 B.R. 945 (9th BAP 1992)
(IRS tax lien did not reach this inheritance)

*In re Nelson*, 180 B.R. 584 (9th BAP 1995).
(Whether RCW 6.15.020 had been preempted by ERISA)

*In re Skagit Pacific Corp.*, 316 B.R. 330 (9th BAP 2004)
(Validity of prepetition security interest)

*In re Wilson*, 341 B.R. 21 (9th BAP 2006).
(Ability to claim homestead exemption)

**U.S. DISTRICT COURT FOR THE WESTERN DISTRICT OF WASHINGTON:**

*In re Islands Bakery Part*, 117 B.R. 243 (DC Wash. 1995)
(Need for a stay pending appeal)

*In re Kerr*, 237 B.R. 488 (WD Wash. 1999)
(Trustee gets tax exemptions)

**U.S. BANKRUPTCY COURT FOR THE WESTERN DISTRICT OF WASHINGTON**

*In re Swift*, 81 B.R. 621 (Bankr. WD Wash. 1987)
(Exemption in funds held by Ch. 13 Trustee)

*In re Schneider*, 99 B.R. 52 (Bankr. WD Wash. 1989)
(Fraud transfer action-transferee is needed party)

*In re Jones, 142 B.R. 950* (Bankr. WD Wash. 1992)
(Ability of Trustee to reach ERISA qualified plan)

*In re Hickenbottom*, 143 B.R. 931 (Bankr. WD Wash. 1992)
(Ability of Debtors to exempt IRA account)

Syllabus

# EXECUTIVE BENEFITS INSURANCE AGENCY *v.* ARKISON, CHAPTER 7 TRUSTEE OF ESTATE OF BELLINGHAM INSURANCE AGENCY, INC.

## CERTIORARI TO THE UNITED STATES COURT OF APPEALS FOR THE NINTH CIRCUIT

No. 12–1200. Argued January 14, 2014—Decided June 9, 2014

Bellingham Insurance Agency, Inc. (BIA), filed a voluntary Chapter 7 bankruptcy petition. Respondent Peter Arkison, the bankruptcy trustee, filed a complaint in the Bankruptcy Court against petitioner Executive Benefits Insurance Agency (EBIA) and others alleging the fraudulent conveyance of assets from BIA to EBIA. The Bankruptcy Court granted summary judgment for the trustee. EBIA appealed to the District Court, which affirmed the Bankruptcy Court's decision after *de novo* review and entered judgment for the trustee. While EBIA's appeal to the Ninth Circuit was pending, this Court held that Article III did not permit a Bankruptcy Court to enter final judgment on a counterclaim for tortious interference, even though final adjudication of that claim by the Bankruptcy Court was authorized by statute. *Stern* v. *Marshall*, 564 U. S. 462, 487. In light of *Stern*, EBIA moved to dismiss its appeal for lack of jurisdiction. The Ninth Circuit rejected EBIA's motion and affirmed. It acknowledged the trustee's claims as "*Stern* claims," *i. e.*, claims designated for final adjudication in the bankruptcy court as a statutory matter, but prohibited from proceeding in that way as a constitutional matter. The Court of Appeals nevertheless concluded that EBIA had impliedly consented to jurisdiction. The Court of Appeals also observed that the Bankruptcy Court's judgment could instead be treated as proposed findings of fact and conclusions of law, subject to *de novo* review by the District Court.

*Held*:

1. Under the Bankruptcy Amendments and Federal Judgeship Act of 1984, federal district courts have original jurisdiction in bankruptcy cases and may refer to bankruptcy judges two statutory categories of proceedings: "core" proceedings and "non-core" proceedings. See generally 28 U. S. C. § 157. In core proceedings, a bankruptcy judge "may hear and determine . . . and enter appropriate orders and judgments," subject to the district court's traditional appellate review. § 157(b)(1). In non-core proceedings—those that are "not . . . core" but are "otherwise related to a case under title 11," § 157(c)(1)—final judgment must be entered by the district court after *de novo* review of the bankruptcy

judge's proposed findings of fact and conclusions of law, *ibid.*, except that the bankruptcy judge may enter final judgment if the parties consent, § 157(c)(2).

In *Stern*, the Court confronted an underlying conflict between the 1984 Act and the requirements of Article III. The Court held that Article III prohibits Congress from vesting a bankruptcy court with the authority to finally adjudicate the "core" claim of tortious interference. The Court did not, however, address how courts should proceed when they encounter a *Stern* claim. Pp. 30–35.

2. *Stern* claims may proceed as non-core within the meaning of § 157(c). Lower courts have described *Stern* claims as creating a statutory "gap," since bankruptcy judges are not explicitly authorized to propose findings of fact and conclusions of law in a core proceeding. However, this so-called gap is closed by the Act's severability provision, which instructs that where a "provision of the Act or [its] application . . . is held invalid, the remainder of th[e] Act . . . is not affected thereby." 98 Stat. 344. As applicable here, when a court identifies a *Stern* claim, it has "held invalid" the "application" of § 157(b), and the "remainder" not affected includes § 157(c), which governs non-core proceedings. Accordingly, where a claim otherwise satisfies § 157(c)(1), the bankruptcy court should simply treat the *Stern* claim as non-core. This conclusion accords with the Court's general approach to severability, which is to give effect to the valid portion of a statute so long as it "remains 'fully operative as a law,'" *Free Enterprise Fund* v. *Public Company Accounting Oversight Bd.*, 561 U. S. 477, 509, and so long as the statutory text and context do not suggest that Congress would have preferred no statute at all, *ibid.* Pp. 35–37.

3. Section 157(c)(1)'s procedures apply to the fraudulent conveyance claims here. This Court assumes without deciding that these claims are *Stern* claims, which Article III does not permit to be treated as "core" claims under § 157(b). But because the claims assert that property of the bankruptcy estate was improperly removed, they are self-evidently "related to a case under title 11." Accordingly, they fit comfortably within the category of claims governed by § 157(c)(1). The Bankruptcy Court would have been permitted to follow that provision's procedures, *i. e.*, to submit proposed findings of fact and conclusions of law to the District Court for *de novo* review. Pp. 37–38.

4. Here, the District Court's *de novo* review of the Bankruptcy Court's order and entry of its own valid final judgment cured any potential error in the Bankruptcy Court's entry of judgment. EBIA contends that it was constitutionally entitled to review by an Article III court regardless of whether the parties consented to bankruptcy court adjudication. In the alternative, EBIA asserts that even if such con-

Syllabus

sent were constitutionally permissible, it did not in fact consent. Neither contention need be addressed here, because EBIA received the same review from the District Court that it would have received had the Bankruptcy Court treated the claims as non-core proceedings under § 157(c)(1). Pp. 38–40.

702 F. 3d 553, affirmed.

THOMAS, J., delivered the opinion for a unanimous Court.

*Douglas Hallward-Driemeier* argued the cause for petitioner. With him on the briefs were *Elizabeth N. Dewar* and *Ryan McManus.*

*John A. E. Pottow* argued the cause for respondent. With him on the brief were *G. Eric Brunstad, Jr.*, and *Kate M. O'Keeffe.*

*Curtis E. Gannon* argued the cause for the United States as *amicus curiae* urging affirmance. With him on the brief were *Solicitor General Verrilli, Assistant Attorney General Delery, Deputy Solicitor General Stewart, Michael S. Raab,* and *Jeffrey Clair.**

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*Briefs of *amici curiae* urging reversal were filed for Certain *TOUSA* Defendants by *Jonathan D. Hacker, Andrew M. Leblanc, Atara Miller,* and *Gabrielle L. Ruha*; for Kerr-McGee Corp. by *David B. Salmons, P. Sabin Willett, Bryan M. Killian, Melanie Gray,* and *Lydia Protopapas*; and for the Robert R. McCormick Foundation et al. by *Charles Fried* and *John P. Sieger.*

Briefs of *amici curiae* urging affirmance were filed for the State of New Hampshire et al. by *Joseph A. Foster,* Attorney General of New Hampshire, *Ann M. Rice,* Deputy Attorney General, and *Peter C. L. Roth,* Senior Assistant Attorney General, and by the Attorneys General for their respective States as follows: *David M. Louie* of Hawaii, *Catherine Cortez Masto* of Nevada, *Ellen F. Rosenblum* of Oregon, *Alan Wilson* of South Carolina, *Robert E. Cooper, Jr.,* of Tennessee, and *Robert W. Ferguson* of Washington; for the American Bar Association by *James R. Silkenat, Catherine Steege, Barry Levenstam, Melissa Hinds,* and *Sonia O'Donnell*; for the American College of Bankruptcy by *Stephen D. Lerner, Pierre H. Bergeron,* and *D. J. Baker*; for the Commercial Law League of America by *Jeffrey T. Kuntz, Michael D. Lessne,* and *Peter M. Gannott*; for the National Association of Bankruptcy Trustees by *Lynne F. Riley*; for the National Association of Chapter Thirteen Trustees by *Henry E. Hilde-*

JUSTICE THOMAS delivered the opinion of the Court.

In *Stern* v. *Marshall*, 564 U. S. 462 (2011), this Court held that even though bankruptcy courts are statutorily authorized to enter final judgment on a class of bankruptcy-related claims, Article III of the Constitution prohibits bankruptcy courts from finally adjudicating certain of those claims. *Stern* did not, however, decide how bankruptcy or district courts should proceed when a "*Stern* claim" is identified. We hold today that when, under *Stern*'s reasoning, the Constitution does not permit a bankruptcy court to enter final judgment on a bankruptcy-related claim, the relevant statute nevertheless permits a bankruptcy court to issue proposed findings of fact and conclusions of law to be reviewed *de novo* by the district court. Because the District Court in this case conducted the *de novo* review that petitioner demands, we affirm the judgment of the Court of Appeals upholding the District Court's decision.

## I

Nicolas Paleveda and his wife owned and operated two companies—Aegis Retirement Income Services, Inc. (ARIS), and Bellingham Insurance Agency, Inc. (BIA). By early 2006, BIA had become insolvent, and on January 31, 2006, the company ceased operation. The next day, Paleveda used BIA funds to incorporate Executive Benefits Insurance Agency, Inc. (EBIA), petitioner in this case. Paleveda and

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*brand III*; for the *TOUSA* Liquidation Trustee by *Lawrence S. Robbins, Roy T. Englert, Jr.*, and *Michael L. Waldman*; for Richard Aaron et al. by *Richard Lieb* and *John Collen*; for S. Todd Brown et al. by *Craig Goldblatt, Danielle Spinelli*, and *Sonya L. Lebsack*; and for Irving H. Picard by *David B. Rivkin, Jr., Andrew M. Grossman, Lee A. Casey*, and *David J. Sheehan.*

Briefs of *amici curiae* were filed for the Business Law Section of the Florida Bar by *Paul Steven Singerman*; and for NVIDIA Corp. by *Mark S. Davies, Frederick D. Holden, Jr., Karen G. Johnson-McKewan*, and *Justin M. Lichterman.*

others initiated a scheme to transfer assets from BIA to EBIA. The assets were deposited into an account held jointly by ARIS and EBIA and ultimately credited to EBIA at the end of the year.

On June 1, 2006, BIA filed a voluntary Chapter 7 bankruptcy petition in the United States Bankruptcy Court for the Western District of Washington. Peter Arkison, the bankruptcy trustee and respondent in this case, filed a complaint in the same Bankruptcy Court against EBIA and others. As relevant here, the complaint alleged that Paleveda used various methods to fraudulently convey BIA assets to EBIA.[1] EBIA filed an answer and denied many of the trustee's allegations.

After some disagreement as to whether the trustee's claims should continue in the Bankruptcy Court or instead proceed before a jury in Federal District Court, the trustee filed a motion for summary judgment against EBIA in the Bankruptcy Court. The Bankruptcy Court granted summary judgment for the trustee on all claims, including the fraudulent conveyance claims. EBIA then appealed that determination to the District Court. The District Court conducted *de novo* review, affirmed the Bankruptcy Court's decision, and entered judgment for the trustee.

EBIA appealed to the United States Court of Appeals for the Ninth Circuit. After EBIA filed its opening brief, this Court decided *Stern*, *supra*. In *Stern*, we held that Article III of the Constitution did not permit a bankruptcy court to enter final judgment on a counterclaim for tortious interference, *id.*, at 487, even though final adjudication of that claim by the Bankruptcy Court was authorized by statute, see Part II–B, *infra*.[2] In light of *Stern*, EBIA moved to dismiss

[1] The trustee asserted claims of fraudulent conveyance under 11 U. S. C. § 548, and under state law, Wash. Rev. Code, ch. 19.40 (2012).

[2] As we explain below, see Part II–B, *infra*, the statutory scheme at issue both in *Stern* and in this case grants bankruptcy courts the authority to "hear and determine" and "enter appropriate orders and judgments" in

its appeal in the Ninth Circuit for lack of jurisdiction, contending that Article III did not permit Congress to vest authority in a bankruptcy court to finally decide the trustee's fraudulent conveyance claims.

The Ninth Circuit rejected EBIA's motion and affirmed the District Court. *In re Bellingham Ins. Agency, Inc.*, 702 F. 3d 553 (2012). As relevant here, the court held that *Stern*, *supra*, and *Granfinanciera, S. A.* v. *Nordberg*, 492 U. S. 33 (1989),[3] taken together, lead to the conclusion that Article III does not permit a bankruptcy court to enter final judgment on a fraudulent conveyance claim against a noncreditor unless the parties consent. 702 F. 3d, at 565. The Ninth Circuit concluded that EBIA had impliedly consented to the Bankruptcy Court's jurisdiction, and that the Bankruptcy Court's adjudication of the fraudulent conveyance claim was therefore permissible. *Id.*, at 566, 568. The Court of Appeals also observed that the Bankruptcy Court's judgment could instead be treated as proposed findings of fact and conclusions of law, subject to *de novo* review by the District Court. *Id.*, at 565–566.

We granted certiorari, 570 U. S. 916 (2013).

## II

In *Stern*, we held that Article III prohibits Congress from vesting a bankruptcy court with the authority to finally adjudicate certain claims. 564 U. S., at 487. But we did not address how courts should proceed when they encounter one of these "*Stern* claims"—a claim designated for final adjudication in the bankruptcy court as a statutory matter, but

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"core" proceedings. 28 U. S. C. § 157(b)(1). The statute lists counterclaims like the one brought in *Stern* as "core" claims. § 157(b)(2)(C).

[3] *Granfinanciera* held that a fraudulent conveyance claim under Title 11 is not a matter of "public right" for purposes of Article III, 492 U. S., at 55, and that the defendant to such a claim is entitled to a jury trial under the Seventh Amendment, *id.*, at 64.

prohibited from proceeding in that way as a constitutional matter.[4]

As we explain in greater detail below, when a bankruptcy court is presented with such a claim, the proper course is to issue proposed findings of fact and conclusions of law. The district court will then review the claim *de novo* and enter judgment. This approach accords with the bankruptcy statute and does not implicate the constitutional defect identified by *Stern*.

A

We begin with an overview of modern bankruptcy legislation. Prior to 1978, federal district courts could refer matters within the traditional "summary jurisdiction" of bankruptcy courts to specialized bankruptcy referees.[5] See *Northern Pipeline Constr. Co.* v. *Marathon Pipe Line Co.*, 458 U. S. 50, 53 (1982) (plurality opinion). Summary jurisdiction covered claims involving "property in the actual or constructive possession of the [bankruptcy] court," *ibid.*, *i. e.*, claims regarding the apportionment of the existing bankruptcy estate among creditors. See Brubaker, A "Summary" Statutory and Constitutional Theory of Bankruptcy Judges' Core Jurisdiction After *Stern* v. *Marshall*, 86 Am. Bkrtcy. L. J. 121, 124 (2012). Proceedings to augment the bankruptcy estate, on the other hand, implicated the district court's plenary jurisdiction and were not referred to the bankruptcy courts absent both parties' consent. See *Mac-*

[4] Because we conclude that EBIA received the *de novo* review and entry of judgment to which it claims constitutional entitlement, see Part IV–B, *infra*, this case does not require us to address whether EBIA in fact consented to the Bankruptcy Court's adjudication of a *Stern* claim and whether Article III permits a bankruptcy court, with the consent of the parties, to enter final judgment on a *Stern* claim. We reserve that question for another day.

[5] Bankruptcy referees were designated "judges" in 1973. See *Northern Pipeline Constr. Co.* v. *Marathon Pipe Line Co.*, 458 U. S. 50, 53, n. 2 (1982) (plurality opinion).

*Donald* v. *Plymouth County Trust Co.*, 286 U. S. 263, 266 (1932); see also Brubaker, *supra*, at 128.

In 1978, Congress enacted sweeping changes to the federal bankruptcy laws. See 92 Stat. 2549. The Bankruptcy Reform Act eliminated the historical distinction between "'summary'" jurisdiction belonging to bankruptcy courts and "'plenary'" jurisdiction belonging to either a district court or an appropriate state court. *Northern Pipeline*, *supra*, at 54 (plurality opinion); see also 1 W. Norton & W. Norton, Bankruptcy Law and Practice § 4:12, p. 4–44 (3d ed. 2013). Instead, the 1978 Act mandated that bankruptcy judges "shall exercise" jurisdiction over "all civil proceedings arising under title 11 or arising in or related to cases under title 11." 28 U. S. C. §§ 1471(b)–(c) (1976 ed., Supp. IV). Under the 1978 Act, bankruptcy judges were "vested with all of the 'powers of a court of equity, law, and admiralty,'" with only a few limited exceptions. *Northern Pipeline*, 458 U. S., at 55 (plurality opinion) (quoting § 1481). Notwithstanding their expanded jurisdiction and authority, these bankruptcy judges were not afforded the protections of Article III—namely, life tenure and a salary that may not be diminished. *Id.*, at 53.

In *Northern Pipeline*, this Court addressed whether bankruptcy judges under the 1978 Act could "constitutionally be vested with jurisdiction to decide [a] state-law contract claim" against an entity not otherwise a party to the proceeding. *Id.*, at 53, 87, n. 40. The Court concluded that assignment of that claim for resolution by the bankruptcy judge "violates Art. III of the Constitution." *Id.*, at 52, 87 (plurality opinion); see *id.*, at 91 (Rehnquist, J., concurring in judgment). The Court distinguished between cases involving so-called "public rights," which may be removed from the jurisdiction of Article III courts, and cases involving "private rights," which may not. See *id.*, at 69–71 (plurality opinion); *id.*, at 91 (Rehnquist, J., concurring in judgment). Specifically, the plurality noted that "the restructuring of

debtor-creditor relations, which is at the core of the federal bankruptcy power, must be distinguished from the adjudication of state-created private rights," which belong in an Article III court. *Id.*, at 71–72, and n. 26.

B

Against that historical backdrop, Congress enacted the Bankruptcy Amendments and Federal Judgeship Act of 1984—the Act at issue in this case. See 28 U. S. C. § 151 *et seq.* Under the 1984 Act, federal district courts have "original and exclusive jurisdiction of all cases under title 11," § 1334(a), and may refer to bankruptcy judges any "proceedings arising under title 11 or arising in or related to a case under title 11," § 157(a).[6] Bankruptcy judges serve 14-year terms subject to removal for cause, §§ 152(a)(1), (e), and their salaries are set by Congress, § 153(a).

The 1984 Act largely restored the bifurcated jurisdictional scheme that existed prior to the 1978 Act. The 1984 Act implements that bifurcated scheme by dividing all matters that may be referred to the bankruptcy court into two categories: "core" and "non-core" proceedings. See generally § 157.[7] It is the bankruptcy court's responsibility to determine whether each claim before it is core or non-core. § 157(b)(3); cf. Fed. Rule Bkrtcy. Proc. 7012. For core proceedings, the statute contains a nonexhaustive list of examples, including—as relevant here—"proceedings to determine, avoid, or recover fraudulent conveyances." § 157(b)(2)(H). The statute authorizes bankruptcy judges

[6] In addition, district courts may also withdraw such matters from the bankruptcy courts for "cause shown." § 157(d).

[7] In using the term "core," Congress tracked the *Northern Pipeline* plurality's use of the same term as a description of those claims that fell within the scope of the historical bankruptcy court's power. See 458 U. S., at 71 ("[T]he restructuring of debtor-creditor relations, which is at the *core* of the federal bankruptcy power, must be distinguished from the adjudication of state-created private rights . . . " (emphasis added)).

to "hear and determine" such claims and "enter appropriate orders and judgments" on them. § 157(b)(1). A final judgment entered in a core proceeding is appealable to the district court, § 158(a)(1), which reviews the judgment under traditional appellate standards, Rule 8013.

As for "non-core" proceedings—*i. e.*, proceedings that are "not . . . core" but are "otherwise related to a case under title 11"—the statute authorizes a bankruptcy court to "hear [the] proceeding," and then "submit proposed findings of fact and conclusions of law to the district court." § 157(c)(1). The district court must then review those proposed findings and conclusions *de novo* and enter any final orders or judgments. *Ibid.* There is one statutory exception to this rule: If all parties "consent," the statute permits the bankruptcy judge "to hear and determine and to enter appropriate orders and judgments" as if the proceeding were core. § 157(c)(2).

Put simply: If a matter is core, the statute empowers the bankruptcy judge to enter final judgment on the claim, subject to appellate review by the district court. If a matter is non-core, and the parties have not consented to final adjudication by the bankruptcy court, the bankruptcy judge must propose findings of fact and conclusions of law. Then, the district court must review the proceeding *de novo* and enter final judgment.

C

*Stern* v. *Marshall*, 564 U. S. 462, confronted an underlying conflict between the 1984 Act and the requirements of Article III. In particular, *Stern* considered a constitutional challenge to the statutory designation of a particular claim as "core." The bankrupt in that case had filed a common-law counterclaim for tortious interference against a creditor to the estate. *Id.*, at 470. Section 157(b)(2)(C), as added by the 1984 Act, lists "counterclaims by the estate against persons filing claims against the estate" as a core proceeding, thereby authorizing the bankruptcy court to adjudicate the

claim to final judgment. See *supra*, at 34. The respondent in *Stern* objected that Congress had violated Article III by vesting the power to adjudicate the tortious interference counterclaim in bankruptcy court. *Stern*, 564 U. S., at 471.

We agreed. *Id.*, at 487. In that circumstance, we held, Congress had improperly vested the Bankruptcy Court with the "'judicial Power of the United States,'" just as in *Northern Pipeline*. *Stern*, 564 U. S., at 487, 503. Because "[n]o 'public right' exception excuse[d] the failure to comply with Article III," we concluded that Congress could not confer on the Bankruptcy Court the authority to finally decide the claim. *Id.*, at 487.

## III

*Stern* made clear that some claims labeled by Congress as "core" may not be adjudicated by a bankruptcy court in the manner designated by § 157(b). *Stern* did not, however, address how the bankruptcy court should proceed under those circumstances. We turn to that question now.

The Ninth Circuit held that the fraudulent conveyance claims at issue here are *Stern* claims—that is, proceedings that are defined as "core" under § 157(b) but may not, as a constitutional matter, be adjudicated as such (at least in the absence of consent), see n. 4, *supra*. See 702 F. 3d, at 562. Neither party contests that conclusion.

The lower courts, including the Ninth Circuit in this case, have described *Stern* claims as creating a statutory "gap." See, *e. g.*, 702 F. 3d, at 565. By definition, a *Stern* claim may not be adjudicated to final judgment by the bankruptcy court, as in a typical core proceeding. But the alternative procedure, whereby the bankruptcy court submits proposed findings of fact and conclusions of law, applies only to non-core claims. See § 157(c)(1). Because § 157(b) does not explicitly authorize bankruptcy judges to submit proposed findings of fact and conclusions of law in a *core proceeding*, the argument goes, *Stern* created a "gap" in the bankruptcy

statute. See 702 F. 3d, at 565. That gap purportedly renders the bankruptcy court powerless to act on *Stern* claims, see Brief for Petitioner 46–48, thus requiring the district court to hear all *Stern* claims in the first instance.

We disagree. The statute permits *Stern* claims to proceed as non-core within the meaning of § 157(c). In particular, the statute contains a severability provision that accounts for decisions, like *Stern*, that invalidate certain applications of the statute:

> "If any provision of this Act or the application thereof to any person or circumstance is held invalid, the remainder of this Act, or the application of that provision to persons or circumstances other than those as to which it is held invalid, is not affected thereby." 98 Stat. 344, note following 28 U. S. C. § 151.

The plain text of this severability provision closes the so-called "gap" created by *Stern* claims. When a court identifies a claim as a *Stern* claim, it has necessarily "held invalid" the "application" of § 157(b)—*i. e.*, the "core" label and its attendant procedures—to the litigant's claim. Note following § 151. In that circumstance, the statute instructs that "the remainder of th[e] Act . . . is not affected thereby." *Ibid.* That remainder includes § 157(c), which governs non-core proceedings. With the "core" category no longer available for the *Stern* claim at issue, we look to § 157(c)(1) to determine whether the claim may be adjudicated as a non-core claim—specifically, whether it is "not a core proceeding" but is "otherwise related to a case under title 11." If the claim satisfies the criteria of § 157(c)(1), the bankruptcy court simply treats the claims as non-core: The bankruptcy court should hear the proceeding and submit proposed findings of fact and conclusions of law to the district court for *de novo* review and entry of judgment.

The conclusion that the remainder of the statute may continue to apply to *Stern* claims accords with our general ap-

proach to severability. We ordinarily give effect to the valid portion of a partially unconstitutional statute so long as it "remains '"fully operative as a law,"'" *Free Enterprise Fund* v. *Public Company Accounting Oversight Bd.*, 561 U. S. 477, 509 (2010) (quoting *New York* v. *United States*, 505 U. S. 144, 186 (1992)), and so long as it is not "'evident'" from the statutory text and context that Congress would have preferred no statute at all, 561 U. S., at 509 (quoting *Alaska Airlines, Inc.* v. *Brock*, 480 U. S. 678, 684 (1987)). Neither of those concerns applies here. Thus, § 157(c) may be applied naturally to *Stern* claims. And, EBIA has identified "nothing in the statute's text or historical context" that makes it "evident" that Congress would prefer to suspend *Stern* claims in limbo. 561 U. S., at 509.[8]

## IV

### A

Now we must determine whether the procedures set forth in § 157(c)(1) apply to the fraudulent conveyance claims at issue in this case. The Court of Appeals held, and we assume without deciding, that the fraudulent conveyance claims in this case are *Stern* claims. See Part III, *supra*. For purposes of this opinion, the "application" of both the "core" label and the procedures of § 157(b) to the trustee's claims has therefore been "held invalid." Note following § 151. Accordingly, we must decide whether the fraudulent conveyance claims brought by the trustee are within the scope of § 157(c)(1)—that is, "not . . . core" proceedings but "otherwise related to a case under title 11." We hold that

[8] To the contrary, we noted in *Stern* that removal of claims from core bankruptcy jurisdiction does not "meaningfully chang[e] the division of labor in the current statute." 564 U. S., at 502. Accepting EBIA's contention that district courts are required to hear all *Stern* claims in the first instance, see Brief for Petitioner 46–48, would dramatically alter the division of responsibility set by Congress.

this language encompasses the trustee's claims of fraudulent conveyance.

First, the fraudulent conveyance claims in this case are "not . . . core." The Ninth Circuit held—and no party disputes—that Article III does not permit these claims to be treated as "core." See Part III, *supra*. Second, the fraudulent conveyance claims are self-evidently "related to a case under title 11." At bottom, a fraudulent conveyance claim asserts that property that should have been part of the bankruptcy estate and therefore available for distribution to creditors pursuant to Title 11 was improperly removed. That sort of claim is "related to a case under title 11" under any plausible construction of the statutory text, and no party contends otherwise. See, *e. g.*, *Celotex Corp.* v. *Edwards*, 514 U. S. 300, 307, n. 5, 308 (1995) ("Proceedings 'related to' the bankruptcy include . . . suits between third parties which have an effect on the bankruptcy estate"). Accordingly, because these *Stern* claims fit comfortably within the category of claims governed by § 157(c)(1), the Bankruptcy Court would have been permitted to follow the procedures required by that provision, *i. e.*, to submit proposed findings of fact and conclusions of law to the District Court to be reviewed *de novo*.

B

Although this case did not proceed in precisely that fashion, we affirm nonetheless. A brief procedural history of the case helps explain why.

As noted, § 157 permits a bankruptcy court to adjudicate a claim to final judgment in two circumstances—in core proceedings, see § 157(b), and in non-core proceedings "with the consent of all the parties," § 157(c)(2). In this case, the Bankruptcy Court entered judgment in favor of the bankruptcy trustee without specifying in its order whether it was acting pursuant to § 157(b) (core) or § 157(c)(2) (non-core with consent). EBIA immediately appealed to the District Court, see § 158, but it did not argue that the Bankruptcy

Court lacked constitutional authority to grant summary judgment. As a result, the District Court did not analyze whether there was a *Stern* problem and did not, as some district courts have done, relabel the bankruptcy order as mere proposed findings of fact and conclusions of law. See, *e. g.*, *In re Parco Merged Media Corp.*, 489 B. R. 323, 326 (Me. 2013) (collecting cases). The District Court did, however, review *de novo* the Bankruptcy Court's grant of summary judgment for the trustee—a legal question—and issued a reasoned opinion affirming the Bankruptcy Court. The District Court then separately entered judgment in favor of the trustee. See 28 U. S. C. § 1334(b) ("[T]he district courts shall have original but not exclusive jurisdiction of all civil proceedings . . . related to cases under title 11").

EBIA now objects on constitutional grounds to the Bankruptcy Court's disposition of the fraudulent conveyance claims. EBIA contends that it was constitutionally entitled to review of its fraudulent conveyance claims by an Article III court regardless of whether the parties consented to adjudication by a bankruptcy court. Brief for Petitioner 25–27. In an alternative argument, EBIA asserts that even if the Constitution permitted the Bankruptcy Court to adjudicate its claim with the consent of the parties, it did not in fact consent. *Id.*, at 38.

In light of the procedural posture of this case, however, we need not decide whether EBIA's contentions are correct on either score. At bottom, EBIA argues that it was entitled to have an Article III court review *de novo* and enter judgment on the fraudulent conveyance claims asserted by the trustee. In effect, EBIA received exactly that. The District Court conducted *de novo* review of the summary judgment claims, concluding in a written opinion that there were no disputed issues of material fact and that the trustee was entitled to judgment as a matter of law. In accordance with its statutory authority over matters related to the bankruptcy, see § 1334(b), the District Court then separately

entered judgment in favor of the trustee. EBIA thus received the same review from the District Court that it would have received if the Bankruptcy Court had treated the fraudulent conveyance claims as non-core proceedings under § 157(c)(1). In short, even if EBIA is correct that the Bankruptcy Court's entry of judgment was invalid, the District Court's *de novo* review and entry of its own valid final judgment cured any error. Cf. *Carter* v. *Kubler*, 320 U. S. 243, 248 (1943) (bankruptcy commissioner's error was cured after the District Court "made an independent and complete review of the conflicting evidence").

Accordingly, we affirm the judgment of the Court of Appeals.

*It is so ordered.*

April 5, 2026

To the WSBA Board of Governors:

I write to express my sincere interest in the WSBA Board of Governors position for District 2 – where I live and am invested deeply in its legal and civic fabric.

My candidacy is grounded in a conviction with the WSBA's goals and mission – that a strong bar association must actively advance justice and hold our profession to its highest ethical standards. I pursue that through consistent engagement: as a member of my firm's DEI Committee and Asian Pacific American Affinity Network; active involvement with KABA of Washington, the Snohomish County Bar Association, JAJEC, and various other local affinity groups; and as Adjunct Disciplinary Counsel for WSBA.

I also mentor emerging attorneys and law students, because the most enduring way to further WSBA's goals is to develop the next generation of lawyers who are equipped – and expected – to carry that work forward.

I am dedicated to serving our community beyond professional obligations to meaningful involvement with local needs, while advancing the legal profession. As a Board Governor, I would actively support such progress, helping to grow and use member engagement not as an end in itself, but as a means by which WSBA fulfills its obligation to the public we serve.

Thank you for your time and consideration,

*Min Kang*

Min Kang

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April 6, 2026

Washington State Bar Association
Board of Governors
barleaders@wsba.org

Re: Appointment of Min Kang to the
Washington State Board of Governors, District 2

Dear Board of Governors,

I enthusiastically endorse Min Kang in her application for the open position on the Washington State Board of Governors for District 2. Though licensed as an attorney in Washington State from 2008, Ms. Kang only returned to Washington State where she grew up in 2021 after having successfully practiced law for years in the state of California.

Ms. Kang has a wide range of law practice experience as researcher, investigator, advisor, and litigator and has worked in various leadership and training capacities to earn her place as shareholder/partner in her past and present law firms. As well, she has shown and taken leadership positions not only in her firms but also on the national and local stages of the cultural and ethnic minority bar associations to which she belongs.

Ms. Kang continues to live out her comitment to building and strengthening her personal and professional communities in Washington. She currently serves as a Board Member of the Snohomish County Bar Association (SCBA), and remains active in local, regional and national minority bar associations. Her commitment is reflected in her actions that seek to promote, pursue, and honor personal and professional relationships in and among the many communities of which she is a part. Her ability to honor, appreciate and yet work to improve her many and growing connections and relationships behoove us all.

Ms. Kang is a known and recognized leader in and of the Korean American Bar Association of Washington (KABA) having served as president and now as an advisory board member; an active, connected leader in the general Korean American community in Western Washington; a known and recognized participant and leader in the Joint Asian Judicial Evaluation Committee (JAJEC); a known and recoginized leader in the National Asian Pacific American Bar Assocatio (NAPABA); known and active member of the Vietnamese American Bar Association of Washington (VABAW); a member of the Washington Women Lawyers (WWL), Snohomish Chapter; and a member or Association of Southern California Defense Council (ASCDC). Her exemplary involvement in and service to her personal and professional communities can not be overstated. I have come to know Ms. Kang in the years since she returned to her home State of Washington.

I respectfully and humbly submit this letter expressing my most sincere and wholehearted support for Ms. Min Kang's application to serve the Washington State Bar Association as a Governor in the open position for District 2.

With Ms. Kang's record of leadership and involvement, I know she will undoubtedly enhance and enrich the WSBA Board of Governors, its role and its operations, as a member of the Board of Governors from District 2. I ask the Board of Governors to give Ms. Kang's application its most thoughtful and highest consideration.

Very truly yours,

Sharon A. Sakamoto
Attorney

SAS:st

# DICKINSON LAW FIRM, PLLC

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

LISA J. DICKINSON*
* Admitted in Washington and Idaho

Phone: (509) 326-0636

lisa@dickinsonlawfirm.com


April 1, 2026

WSBA Board of Governors

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

RE: Min Kang candidate for BOG Governor

Dear Governors:

I am writing in my personal capacity to recommend that you select Min Kang as the WSBA Governor for the vacancy in District 2. I have had the privilege of getting to know Min both personally and professionally in our mutual network of affinity bar associations. Over the years I've known her, I have witnessed Min's exceptional contributions to our legal community from multiple perspectives—as a colleague, a referral partner, and a fellow advocate for advancement of the legal profession and our legal community in this state. She will be a great representative on the Board of Governors not only to attorneys in her district, but also state-wide.

One of Min's most impressive qualities is her generous spirit in building and supporting our professional community. As someone who has participated in various bar association events at which Min has also participated, I can attest to her commitment to fostering collaboration among legal professionals. Min consistently goes above and beyond to connect colleagues with opportunities, resources, and partnerships that advance both individual careers and the broader legal community. Her willingness to share knowledge and create connections has been particularly valuable for attorneys navigating new practice areas or geographic markets. Min understands that our profession thrives when we support each other's success, and she actively works to create those connections.

Min's leadership in local legal organizations demonstrates her commitment to advancing our community's interests. Her roles as (prior) Co-Chair of the Joint Asian Judicial Evaluation Committee and (prior) President of the Korean American Bar Association of Washington, participation as a member of the Asian Bar Association of Washington, and recent joining of the Board of Trustees for the Snohomish County Bar Association reflect her dedication to connecting, growing and strengthening our legal community while helping to improve the legal profession for all practitioners. These leadership positions require the collaborative skills and strategic thinking that define Min's approach to professional service. I know that she is a hard worker, a quick study, and will get the work done. In her current work role as a partner at Hinshaw & Culbertson, she is known as an excellent litigator and will be able to manage the

standard of excellence expected in her volunteer work as well. She is also a pleasure to work with!

I highly recommend Min Kang for the Board of Governors position for District 2 and am confident that she will continue to make exceptional contributions to our profession and community in such capacity. Please do not hesitate to contact me at any time with any questions about her candidacy!

Very truly yours,

LISA J. DICKINSON
LJD/bm
C:\Documents and Settings\Lisa\My Documents\ltr.doc

**MIN K. KANG, ESQ.**
[redacted] | [redacted] | [redacted]

## SUMMARY

Accomplished litigation leader with 20 years of experience in business litigation, insurance coverage and bad faith, and regulatory compliance across multi-jurisdictional environments. Proven track record of leading and mentoring legal teams, managing high-volume caseloads, and aligning litigation strategies with business goals. Skilled in legal risk assessment, policy oversight, and cross-functional collaboration with claims and compliance teams. Adept at driving operational excellence, fostering a high-performing culture, and delivering cost-effective outcomes through strategic case management and continuous improvement initiatives.

## CORE COMPETENCIES

**Legal Expertise:** Business Litigation, Insurance Coverage and Bad Faith, Appellate Work, Regulatory Compliance, Personal Injury
**Leadership & Strategy:** Legal Team Management, Business Development, Cross-Functional Collaboration, Litigation Strategy, Mentoring and Training
**Operations & Risk:** Legal Risk Assessment and Mitigation, Policy Oversight, Budget Management, Operational Efficiency
**Compliance:** Regulatory, Licensing and Insurance Compliance

## PROFESSIONAL EXPERIENCE

**Hinshaw & Culbertson, LLP** – Remote; Mukilteo, WA
*Partner | Dec 2023 – Present*

- **Lead** strategic litigation teams across high-exposure insurance and defense matters, advising clients on risk reduction and regulatory compliance.
- **Develop** and implement teamwide litigation plans tailored to client goals, aligning with budget and legal risk parameters.
- **Mentor** junior and senior attorneys, fostering their professional development.
- **Contribute** to DEI strategic initiatives as a committee member, reinforcing a culture of accountability and inclusion. Awarded the firm's 2024 DEI Ambassador Award.

**Coddington Hicks & Danforth, APC** – Remote; Santa Monica, CA / Mukilteo, WA
*Shareholder | Jan 2016 – Nov 2023*

- **Managed** a high-volume, litigation portfolio of defense cases including insurance coverage and bad faith, personal injury, and regulatory disputes, aligning strategies with enterprise risk priorities.
- **Hired, trained, and supervised** a legal team, setting clear performance benchmarks and streamlining case review workflows.
- **Provided strategic counsel** to enterprise-level clients on legal risk exposure in insurance, coverage, training and licensing, and e-commerce, helping shape corporate policy and compliance.
- **Collaborated** cross-functionally with insurers, claims adjusters, and external stakeholders to align case strategies and compliance initiatives.

**Selman Breitman, LLP** – Los Angeles, CA
*Attorney | Jul 2008 – Jan 2016*

- **Managed** a portfolio of 60+ actively litigated cases concurrently, including toxic tort, product liability, and personal injury defense matters.
- **Conducted legal risk assessments** and drafted coverage evaluations in high-stakes insurance disputes.
- **Negotiated** favorable settlements and achieved early resolutions that balanced legal exposure with cost-efficiency for carriers and insured parties.

**Lynberg & Watkins, APC** – Los Angeles, CA
*Attorney; Summer Associate | Sep 2006 – Jun 2008; Summer 2005*

- **Advised** on business contract terms and environmental/toxic tort insurance coverage.

**Superior Court of San Diego – Family Law Court** – San Diego, CA
*Judicial Clerk | Spring 2006*

- Analyzed case files, conducted legal research, and prepared bench memoranda and written decisions upon which the court heavily relied.

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## EDUCATION & CREDENTIALS

**University of San Diego School of Law**
Juris Doctor, May 2006

- Honors: Academic Scholarship (2003-2004); Am Jur Awards: International Art Law, Public International Law.

**University of Washington**
B.F.A., Visual Communication Design; B.A., Interdisciplinary Visual Arts; Minor, Art History | June 1999

- Honors: Dean's List (1995-99); Milnora Roberts Scholarship (1998).

**Published Decisions**

- *Dameron Hospital Association v. Progressive Casualty Ins. Co.*, 111 Cal.App.5th 530 (2025)
- *Dameron Hospital Association v. AAA Northern California, Nevada & Utah Ins. Exchange*, 74 Cal.App.5th 796 (2022)
- *CSAA Insurance Exchange v. Hodroj*, 72 Cal. App. 5th 272 (2021)
- *Janney v. CSAA Insurance Exchange*, 70 Cal. App. 5th 374 (2021)
- *Baldwin v. AAA NCNU*, 1 Cal. App. 5th 545 (2016)

**Bar Admissions & Affiliations**

- State Bar of California (2006); State Bar of Washington (2008).
- Multiple Federal District Court and Appellate Court Admissions in California and Washington.
- *Current* Snohomish County Bar Association (SCBA) Board Member, Korean American Bar Association (KABA) of Washington Advisory Board Member, Asian Bar Association of Washington (ABAW) Member, Vietnamese American Bar Association of Washington (VABAW) Member, Joint Asian Judicial Evaluations Committee (JAJEC) Member, Washington Women Lawyers (Snohomish County Chapter) Member, National Asian Pacific American Bar Association (NAPABA) Member, Association of Southern California Defense Counsel (ASCDC) Member; *Former* KABA Washington President (2023); JAJEC Co-Chair (2022); Legal Advisor to the South Korean Consulate (Civil; 2022).

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# WASHINGTON STATE BAR ASSOCIATION

## Board of Governors Congressional District - Application Form

**All Application materials must be received by 5 p.m. PST on Tuesday, April 7, 2026.**
*Late materials will not be accepted.*

## INSTRUCTIONS

1. Review all information regarding board service, the application and the election processes online here.
2. Complete this required application form. If you are nominating someone else, ask them to sign it below.
3. Email this signed form and materials to barleaders@wsba.org. Applications must be received by 5 p.m. PST on Tuesday, April 7, 2026. Late materials will not be accepted.

---

| Applicant Information | |
|---|---|
| **Name** | Min K. Kang |
| **WSBA Bar #** | 40360 |
| **Email Address** | mkang@hinshawlaw.com |
| **Phone Number** | 213-614-7312 |
| **Congressional District Position:** | ☒ District 2<br>☐ District 3<br>☐ District 6<br>☐ District 8 |

### Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor from the above indicated district.

Min K. Kang — 40360

Name of Candidate (please print) — WSBA Bar #

Signature of Nominator (if applicable) — WSBA Bar #

Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on April 7, 2026. Filing may be accomplished by emailing the form to barleaders@wsba.org. For questions, please email barleaders@wsba.org.

Candidate Statement of Kenneth Zirkman

I practiced law for 34 years in Georgia before relocating to Mukilteo, Washington in 2024 with my wife, dog, two cats, and three turtles.

I am Senior Counsel with Andritz Inc., a Vienna based multinational company. As an in-house lawyer working remotely, I don't have as many opportunities to meet and interact with other members of the bar.

As a new member of the Washington State Bar Association, I want to get involved with the WSBA. My goals are to stay active in my chosen profession, continue giving back to my community, and make new friends in the legal community.

I am applying for the open position with District 2 because I believe by volunteering my time in this manner it will help me achieve my goals and help others.

# WASHINGTON STATE BAR ASSOCIATION

## Board of Governors Congressional District - Application Form

**All Application materials must be received by 5 p.m. PST on Tuesday, April 7, 2026.**
*Late materials will not be accepted.*

### INSTRUCTIONS

1. Review all information regarding board service, the application and the election processes online here.
2. Complete this required application form. If you are nominating someone else, ask them to sign it below.
3. Email this signed form and materials to barleaders@wsba.org. Applications must be received by 5 p.m. PST on Tuesday, April 7, 2026. Late materials will not be accepted.

| Applicant Information | |
|---|---|
| **Name** | Kenneth Zirkman |
| **WSBA Bar #** | 63364 |
| **Email Address** | Ken.zirkman@andritz.com |
| **Phone Number** | 678-230-7296 |
| **Congressional District Position:** | ☒ District 2<br>☐ District 3<br>☐ District 6 |

### Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor from the above indicated district.

Kenneth Zirkman — 63364

Name of Candidate (please print) — WSBA Bar #

Signature of Nominator (if applicable) — WSBA Bar #

Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on April 7, 2026. Filing may be accomplished by emailing the form to barleaders@wsba.org. For questions, please email barleaders@wsba.org.

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors

**FROM:** Rajeev D. Majumdar, Chair, WSBA Oath Review and Drafting Task Force

**DATE:** April 6, 2026

**RE:** Status Update – WSBA Oath Review and Drafting Task Force

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The WSBA Oath Review and Drafting Task Force ("Task Force") was formed in July 2025 to consider the preadmission oaths taken by licensed legal professionals in Washington State and, as appropriate, to make recommendations to update and reinvigorate the content of those oaths.

**Background**

On May 1, 2025, at local Law Day ceremonies around the state coordinated by the WSBA, hundreds of lawyers gathered to retake their professional oath, emphasizing their duty to uphold the Constitution and the rule of law. In the wake of that event, the judiciary and a number of WSBA Governors noticed the pronounced length of the oath, as well as the dissonance of some of its archaic phraseology. At the May 2025 Board of Governors meeting, then-President Sunitha Anjilvel recommended that the WSBA initiate a project to examine whether the Supreme Court should update and reinvigorate the oath. At the July 2025 Board of Governors meeting, the Board adopted the Task Force Charter. After a member outreach and recruitment effort, then-President Anjilvel appointed (and, at its August 2025 meeting, the Board accepted) a nine-person Task Force, consisting of the following WSBA members:

- Rajeev D. Majumdar, Chair
- Hunter M. Abell (former BOG member)
- Angela J. Balconi (LPO member)
- The Hon. Rebecca R. Glasgow (judicial member)
- Courtney Hudak (member at-large)
- Professor Monte Mills (member at-large)
- Kyle D. Sciuchetti (former BOG member)
- The Hon. James Smith (judicial member)
- Roger D. Wynne (member at-large)

Chief Disciplinary Counsel Douglas Ende, assisted by Disciplinary Program and Systems Manager Rachel Agent, serves as the staff liaison to the Task Force, and Governor Matthew Dresden serves as its Board of Governors Liaison.

Key elements of the Task Force Charter are as follows:

- 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 text of each of Washington state's oaths is attached as **Appendix A** to this memo.]

The Board directed the Task Force to complete work and submit a final report within one year of its initial meeting. The initial meeting of the Task Force took place on October 31, 2025. The Board further directed the Task Force to provide periodic progress updates to the Board. This is the first such update.

**Task Force Progress**

- The Task Force has held five meetings-of-the whole. Its next meeting is scheduled for May 18, 2026.
- In November 2025, the Task Force Chair directly sought advisory perspectives from a broad range of members and stakeholder groups, including from representatives of all groups spelled out as priority stakeholders in the Charter.
- The Task Force launched a web page, along with a dedicated email address to receive input from stakeholders: oathtaskforce@wsba.org.
- Task Force meetings have been well attended by liaisons, guests, and interested observers, including Sunitha Anjilvel (WSBA Past President), Steve Crossland (Chair of the LLLT Board and WSBA Past President), the Hon. Sergio Flores (Member, Access to Justice Board), Joshua Goodwin (J.D. Candidate, University of Washington School of Law), Sara Niegowski (WSBA Chief Communications and Outreach Officer), Erin Overbey (Immediate Past President, King County Bar Association), and David Ward (Principal Legal Analyst, Administrative Office of the Courts).
- The Task Force compiled, reviewed, and discussed information about the history of the Washington state oaths. During this phase of its work, the Task Force learned, *inter alia*, that:
    - Washington's Oath of Attorney has roots going back to Washington's territorial period and influenced the creation of the ABA Model Oath;
    - the Oath of Attorney was first codified by statute in 1909 (repealed 2023);
    - the Washington Supreme Court adopted the Oath as a court rule in 1954;
    - since its inception, the oath has been amended a number of times;
    - since the turn of the second millennium, the WSBA has twice proposed amendments to the Oath (in 2001 and 2016), but neither proposal was adopted by the Supreme Court; and

    - the Oath for Limited Practice Officers was adopted in 1987; the Oath for Limited License Legal Technicians was adopted in 2012.
- The Task Force prepared a compilation of oaths of attorney from jurisdictions throughout the United States and evaluated information based on a comparative analysis of U.S. oaths. During this phase of its work, the Task Force learned, for example, that:
    - By word count, Washington state's oath of attorney is the fourth longest oath in the United States, exceeding the median word count by 115 words; and
    - Washington state is one of nine U.S. jurisdictions that includes an "offensive personality/personalities" clause.
- The Task Force assembled and reviewed academic and professional literature on the history of oaths of attorney, which often includes suggestions for oath modification and improvement. A bibliography of materials considered by the Task Force is attached as **Appendix B** to this memo.
- Between January and March 2026, the Task Force (assisted by WSBA Chief Communications Officer Sara Niegowski) conducted a broadly distributed membership survey seeking opinions about the current oath and potential change to the oath from each license type: lawyer, LPO, and LLLT. Launch of the survey was supported by publication of a Guest Column in the Bar News. *See* Rajeev D. Majumdar, *To Bind Our Profession: The Nature of Our Oath*, Washington State Bar News Vol. 80, No. 2, at 12 (Feb. 2026), among other outreach efforts. A comprehensive analysis of the data is underway, but preliminary review of survey data shows that:
    - a majority of lawyers and LLLTs responding to the survey favored revising the oath;
    - a significant majority of LPOs favored revision; and
    - there was a notable difference in opinion about revising the oath based on years in practice, with lawyers in practice for 31 years or more tending to oppose revision and lawyers with fewer than 31 years in practice tending to favor it.
- At its March 2026 meeting, the Task Force approved formation of two subcommittees: a Subcommittee on Revision of Existing Oath Provisions (Roger Wynne, *Chair*; Courtney Hudak; Angie Balconi), and a Subcommittee on Potential New Oath Provisions (Hon. Rebecca Glasgow; *Chair*, Professor Monte Mills; Hon. James Smith).

## Conclusion

I look forward to sharing more information about our process and answering questions at the Board of Governos meeting in May. On behalf of the Task Force, I thank the Board for chartering this important endeavor; a fully informed and deliberate effort to modify Washington's oaths has the potential to uplift the perspective of new admittees to our profession and to boost the professionalism of the membership as a whole.

## Appendix

- A - Washington State's Three Oaths
- B - Bibliography of materials considered by Task Force

# APPENDIX A

**Washington State's Three Oaths (Attorney, Limited Practice Officer, Limited License Legal Technician)**

**APR 5(g) Contents of Oath of Attorney**. The oath which all applicants shall take is as follows:

OATH OF ATTORNEY

State of Washington, County of _____ ss.

I, _____, do solemnly declare:

1. I am fully subject to the laws of the State of Washington and the laws of the United States and will abide by the same.

2. I will support the constitution of the State of Washington and the constitution of the United States.

3. I will abide by the Rules of Professional Conduct approved by the Supreme Court of the State of Washington.

4. I will maintain the respect due to the courts of justice and judicial officers.

5. I will not counsel, or maintain any suit, or proceeding, which shall appear to me to be unjust, or any defense except as I believe to be honestly debatable under the law, unless it is in defense of a person charged with a public offense. I will employ for the purpose of maintaining the causes confided to me only those means consistent with truth and honor. I will never seek to mislead the judge or jury by any artifice or false statement.

6. I will maintain the confidence and preserve inviolate the secrets of my client, and will accept no compensation in connection with the business of my client unless this compensation is from or with the knowledge and approval of the client or with the approval of the court.

7. I will abstain from all offensive personalities, and advance no fact prejudicial to the honor or reputation of a party or witness unless required by the justice of the cause with which I am charged.

8. I will never reject, from any consideration personal to myself, the cause of the defenseless or oppressed, or delay unjustly the cause of any person.

_____

(signature)

Subscribed and sworn before me this _____ day of _____, _____.

_____

Judge

**APR 5(h) Oath for Limited Practice Officers—Contents of Oath.**

OATH FOR LIMITED PRACTICE OFFICERS

STATE OF WASHINGTON

COUNTY OF _____

I, _____, do solemnly declare:

1. I am fully subject to the laws of the State of Washington and Rule 12 of the Admission and Practice Rules and APR 12 Regulations adopted by the Washington State Supreme Court and will abide by the same.

2. I will support the constitutions of the state of Washington and of the United States of America.

3. I will abide by the Limited Practice Officer Rules of Professional Conduct and Rules for Enforcement of Limited Practice Officer Conduct approved by the Supreme Court of the State of Washington.

4. I will confine my activities as a Limited Practice Officer to those activities allowed by law, rule, and regulation and will only utilize documents approved pursuant to APR 12.

5. I will faithfully disclose the limitations of my services, that I am not able to act as the advocate or representative of any party, that documents prepared will affect legal rights of the parties, that the parties' interests in the documents may differ, that the parties have a right to be represented by a lawyer of their own selection, and that I cannot give legal advice regarding the manner in which the documents affect the parties.

I understand that I may incur personal liability if I violate the applicable standard of care of a Limited Practice Officer. Also, I understand that I have authority to act as a Limited Practice Officer only during the times that my financial responsibility coverage is in effect. If I am covered under my employer's errors and omissions insurance policy or by my employer's certificate of financial responsibility, my coverage is limited to services performed in the course of my employment.

_____

Signature

Subscribed and sworn to before me this _____ day of _____, _____.

_____

JUDGE

**APR 5(j) Contents of Oath of Limited License Legal Technician**. The oath that all applicants shall take is as follows:

OATH OF LIMITED LICENSE LEGAL TECHNICIAN

STATE OF WASHINGTON

COUNTY OF _____

I, _____, do solemnly declare:

1. I am fully subject to the laws of the State of Washington, the laws of the United States, Rule 28 of the Admission and Practice Rules, and APR 28 Regulations adopted by the Washington State Supreme Court and will abide by the same;

2. I will support the constitutions of the State of Washington and of the United States of America;

3. I will abide by the Limited License Legal Technician Rules of Professional Conduct approved by the Supreme Court of the state of Washington;

4. I will confine my activities as a Limited License Legal Technician to those activities allowed by law, rule, and regulation and will only utilize documents approved pursuant to APR 28;

5. I will faithfully disclose the limitations of my services and that I am not a lawyer;

6. I will maintain the confidence and preserve inviolate the secrets of my client and will accept no compensation in connection with the business of my client unless this compensation is from or with the knowledge and approval of the client or with the approval of the court;

7. I will abstain from all offensive personalities and advance no fact prejudicial to the honor or reputation of a party or witness unless required by the justice of the cause with which I am charged;

8. I will never reject, from any consideration personal to myself, the cause of the defenseless or oppressed, or delay unjustly the cause of any person.

_____

Signature

Subscribed and sworn to before me this _____ day of _____, _____.

_____

Judge

# APPENDIX B

**Bibliography of materials considered by Task Force**


American Bar Association, *2025 Report of the ABA Task Force for American Democracy* (2025).

Carol R. Andrews, *The Lawyer's Oath: Both Ancient and Modern*, 22 Geo. J. Legal Ethics 3 (2009).

Lauren E. Bartlett, *Human Rights and Lawyer's Oaths*, 36 Geo. J. Legal Ethics 411 (2023).

Judge Wendy Beetlestone, *The Oath of Office: A Pillar of the Rule of Law*, University of Pennsylvania Law Review, Volume 173: 65, Keynote Address (2025).

Colin M. Black, *Renewing Our Vows: The Lawyer's Oath and Our Pledge to Democracy*, 22 Rutgers Journal of Law & Public Policy 1 (2024).

Doug Ende, *Summary of the History of Washington State's Oaths* (2025) (available upon request).

Robert Anthony Gottfried, *The Anatomy of Our Oath to Support the US Constitution*, American Bar Association, After the Bar: Professional Development (2021).

Joshua Goodwin, All Jurisdiction Oath Chart (2025) (available upon request).

Erin Overby, *Keeping the Oath: A Promise to Defend the Constitution in a Defining Moment*, King County Bar Bulletin (2025).

Erin Overby, *Thank You for Your Support*, King County Bar Bulletin (2025).

Jared A. Picchi, *Massachusetts Attorney's Oath: History That Should Not Be Repeated*, UMass Law Review, 13 U. Mass L. Rev. 306 (2025).

Hugh C. Todd, State Bar Journal, *The Meaning of a Lawyer's Oath of Office*, 12 Wash. L. Rev. & St. B.J. 174 (1937).

State Bar of California, Submit your civility oath declaration: Learn how to complete your Annual Renewal civility oath declaration requirement.

Supreme Court of California, Administrative Order 2025-09-24-01, Amendments to Rule 9.7 of the California Rules of Court (2025).

Supreme Court of Washington, Order 25700-A-1643 adopting remote oathtaking (2025).

Code Duello Kentucky, Secretary of State, Kentucky.

U.S. Oaths of Admission

WASHINGTON STATE BAR FOUNDATION

To: WSBA Board of Governors

From: Brian J. Anderson, President

Re: 2025-2026 Board of Trustees Appointment

Date: March 27, 2026

The Washington State Bar Foundation Board is pleased to present the updated proposed 2025-26 Board of Trustees roster.

The Washington State Bar Foundation is the fundraising arm of the WSBA. The current members of the WSBA Board of Governors constitute the membership of the Foundation. Per the Foundation's Bylaws, the WSBA Executive Director serves as the Foundation's Secretary ex officio, the WSBA Immediate Past President serves as a trustee ex officio, and the WSBA President each year appoints a first year Governor to serve a three-year term on the Foundation Board. The remaining seats are recommended by the Foundation Board and appointed by the Board of Governors, convened as the members of the Foundation.

The Foundation Board has approved the addition of Audrey Tran to the list of trustees on the following page.

Attachments:

- Proposed roster

WASHINGTON STATE BAR FOUNDATION

# 2025-2026 Board of Trustees, Recommendation

| POSITION | RECOMMENDATION | TERM, ending |
|---|---|---|
| WSBA 1st Year Governor | *Appointed by 2025-2026 BOG President* Nam Nguyen | September 2028 |
| WSBA 2nd Year Governor | *Appointed by 2024-2025 BOG President* Jordan Couch | September 2027 |
| WSBA 3rd Year Governor | *Appointed by 2023-2024 BOG President* Kristina Larry | September 2026 |
| WSBA Past President or Governor | Tracy S. Flood, Treasurer | 2nd Regular Term, September 2026 |
| WSBA Member | Brian Anderson, President | 1st Term, September 2026 |
| WSBA Member | Peter Finch | 2nd Regular Term, September 2026 |
| WSBA Member | Maya Manus | September 2026* |
| WSBA Member | Kriti Ganguly | 1st Term, September 2028 |
| Affinity/Specialty Bar Rep. | Deb Wechselblatt | 2nd Regular Term, September 2027 |
| Law Student | Audrey Tran | Graduation |
| Public Member | Lucretia Robertson | 1st Term, September 2026 |
| Public Member | ***Vacant*** | Remainder, September 2026 |
| At Large | Carolyn Powers | September 2028* |
| At Large | Rajeev Majumdar, Vice President | 2nd Term, September 2027 |
| At Large | Kristine Kuenzli | 2nd Term, September 2026 |
| WSBA Immediate Past President | Sunitha Anjilvel | September 2026, serves Ex Officio |
| WSBA Executive Director | Terra Nevitt, Secretary | Executive Director serves Ex Officio |

WASHINGTON STATE
BAR ASSOCIATION

# WSBA Member Well-Being Task Force: Final Report

PRESENTED TO THE WSBA BOARD OF GOVERNORS – MAY 2026


**WASHINGTON STATE BAR ASSOCIATION**
1325 Fourth Avenue, Suite 600, Seattle, WA 98101-2539
**206.727.8200 | www.wsba.org**

WASHINGTON STATE
BAR ASSOCIATION

# Acknowledgments

This compilation of work would not be possible without the dedicated contributions of the members of the WSBA Member Well-Being Task Force.

## THANK YOU TO ALL OF THE CONTRIBUTING MEMBERS.

| NAME | POSITION |
|---|---|
| **Justin Bingham** | *Chair and WSBA Member* |
| **Emily Arneson** | *WSBA Member* |
| **Melissa Berry** | *WSBA Member* |
| **Darcel Lobo** | *WSBA Member* |
| **Bushra Rahim** | *WSBA Member* |
| **Kyle Sciuchetti** | *WSBA Member* |
| **Judge Michael Finkle, J.D., M.B.A.** | *Judicial Member* |
| **Justice Raquel Montoya-Lewis** | *WA Supreme Court Justice* |
| **Susan Lee, Ph.D.** | *Public Member* |
| **Laura Moss, M.D.** | *Public Member* |
| **Sara Smucker Barnwell, Ph.D., M.Ed** | *Public Member* |
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# Executive Summary

This Washington State Bar Association (WSBA) Well-Being Task Force (WBTF) Final Report provides a comprehensive roadmap for improving the well-being of Washington legal professionals.[1]

Formed in January 2024, the WBTF was charged with identifying systemic challenges and recommending actionable strategies aligned with national standards such as *The Path to Lawyer Well-Being.*[2]

Drawing on findings from eight specialized workgroups and the WSBA Well-Being Survey (WBS), the final report highlights widespread stress, burnout, and mental health concerns across the profession. Lawyers in private practice and government roles report the highest levels of strain, while early-career lawyers face compounded challenges from heavy workloads, imposter syndrome, and significant law school debt.

Alarmingly, ten percent of survey respondents disclosed suicidal thoughts in the past year, and twenty percent expressed concern about alcohol use. Despite the availability of well-being resources, fewer than half of WSBA members have utilized them, citing stigma, confidentiality fears, and lack of awareness.

Legal professionals from communities that have historically been excluded from the profession experience even greater stress and burnout, often compounded by microaggressions and underrepresentation. Judges face unique stressors, including isolation, decision fatigue, and security threats, while cultural norms in the legal profession discourage help-seeking.

## FIVE RECOMMENDATION THEMES EMERGED ACROSS THE WORKGROUPS:

1. **Normalize help-seeking** through clear, repeated communications and leadership modeling that reduce stigma and make it safe to use support without fear of disciplinary consequences.

2. **Expand education and training**, including no- or low-cost continuing legal education programs (CLEs) and practical skills such as Mental Health First Aid, trauma-informed practice, boundary setting, and productivity as well-being.

3. **Improve access to resources and protect confidentiality** by offering anonymous, easy-to-find referral directories; extending after-hours/telehealth options; and forging partnerships (e.g., gym/well-being discounts) that meet members where they are.

4. **Build connection and mentoring at scale** — from structured mentorship for new lawyers and judges to peer support networks and small-group communities that reduce isolation, especially in solo/small practice and rural benches.

5. **Pursue structural and policy reforms** like reasonable caseload/workload standards, court

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1. The term *legal professionals* encompasses judicial officers, lawyers, and law students.
2. Nat'l Task Force on Law. Well-Being, *The Path to Lawyer Well-Being: Practical Recommendations for Positive Change* (2017), https://instwellbeing.org/wp-content/uploads/2020/10/path_to_lawyer_well_being.pdf.

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and regulatory updates (e.g., well-being aligned rules/comments), and an employer Well-Being Pledge—to align incentives with sustainable practice.

A complete, at-a-glance list of recommendations appears in the Summary of Recommendations in Appendix B.

The path forward requires collaboration among WSBA, courts, law schools, employers, and affinity groups to measure progress. Above all, leadership must drive a cultural shift that treats well-being as integral to professional competence and ethical practice. By embracing these recommendations, Washington can lead the nation in creating a legal profession where well-being is not aspirational but foundational.

By embracing these recommendations, Washington can lead the nation in creating a legal profession where well-being is not aspirational but foundational.

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# Introduction to Findings and Recommendations

## Purpose and Scope

The WSBA established the Taskforce in January 2024 with a clear mandate: to advance the well-being of Washington's legal professionals by identifying systemic challenges and recommending actionable strategies. The Charter emphasizes alignment with national standards, including *The Path to Lawyer Well-Being*,[3] and recognizes that the well-being of legal professionals is essential to both competent and ethical practice. The WSBA Board of Governors (BOG) adopted member well-being as an organizational priority in November 2023, underscoring the importance of this work.[4]

This report represents the culmination of the Task Force's efforts and is presented to the BOG at the conclusion of the Taskforce's term in March 2026. It synthesizes findings and recommendations from eight specialized workgroups, each focused on a distinct area of concern, and provides a roadmap for improving well-being across the legal profession in Washington.

## Structure and Methodology

The WBTF is committed to advancing the well-being of legal professionals, not only at the individual level, but also through systemic reforms within legal institutions that adversely affect professional health. To support this mission, the WBTF established eight workgroups covering a wide range of legal professionals and topics.

Four workgroups focused on distinct areas of legal practice: the Law Students and New Members Workgroup, Private Practice Workgroup, Government and Public Interest Workgroup, and Judiciary Workgroup. Two workgroups addressed critical issues impacting the profession: the Suicide and Addiction Workgroup and the Diversity, Equity, and Inclusion Workgroup. Two additional workgroups concentrated on bar association and regulatory matters: the Member Wellness Program Workgroup and the Rules and Regulatory Workgroup. Collectively, these workgroups provide a comprehensive framework for promoting well-being and fostering meaningful change across the legal community.

Each workgroup conducted research, reviewed relevant literature, and engaged stakeholders to identify challenges and propose solutions. Some work groups supplemented their analysis with targeted surveys to capture perspectives unique to their focus area. This report consolidates those findings and recommendations into a unified document, structured to present findings first, followed by actionable recommendations for each area.

## Survey Context

A cornerstone of the WBTF's work was the WSBA Member Well-Being Survey (Appendix C), developed and deployed by the Member Survey Workgroup between late 2024 and early 2025. The survey was administered by the National Business Research Institute (NBRI) from January 28 to February 20, 2025, in collaboration with Professor Matthew S. Thiese of the

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3. National Task Force on Lawyer Well Being (2017) The Path to Lawyer Well-Being: Practical Recommendations for Positive Change. American Bar Association.
4. WSBA Well-Being Task Force Charter, 2024.01.12; Retrieve here: member-well-being-task-force-charter.pdf.

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University of Utah School of Medicine. Professor Thiese attended workgroup meetings, actively contributed to the development of survey questions alongside Task Force members, and assisted with interpreting results and conducting demographic segmentation analysis. The Task Force does not claim statistical causality or correlation when discussing the results of the segment analyses. Further research and analysis of each segment would be necessary to draw those statistical determinations.

The survey achieved 903 responses (approximately 9% response rate) from a proportional sample of WSBA members across Washington, yielding a 99.8% confidence level with a 5% margin of error. This robust dataset provided critical insights into the well-being of Washington's legal professionals and informed the Task Force's recommendations. The survey also included segmentation analysis across practice settings, career stages, and demographics, revealing unique stressors for solo practitioners, government lawyers, and new members.

These findings underscore systemic challenges in workload, workplace culture, and access to support. Relevant findings from the survey will be referenced throughout the report in each workgroup section to provide context and support for recommendations.

Supplemental surveys conducted by other workgroups explored domain-specific issues; however, these should not be conflated with the primary survey administered in partnership with NBRI and Professor Thiese. Where applicable, results from the supplemental surveys will be discussed in the relevant workgroup section.

## KEY FINDINGS

### Stress and Burnout

Nearly **58%** of respondents reported feeling burned out regularly or occasionally, with **8.8%** experiencing burnout daily. Rates were highest among new members (**80%**) and lawyers in medium and large firms (**64.2%**).

### Mental Health and Suicidal Ideation

**15.7%** reported persistent feelings of depression, and **56.8%** experienced anxiety symptoms. Alarmingly, **9.9%** disclosed suicidal thoughts or actions in the past year, with most attributing these to workplace factors.

### Workload Pressures

The majority worked 40–59 hours per week, with new members and large-firm lawyers reporting significantly longer hours. **66.9%** experienced stress from billable hour expectations, and **36.5%** were expected to be available outside work hours regularly.

### Financial Stressors

**77.1%** graduated with student loan debt, and over half reported that debt negatively impacted mental well-being. Among new members, **46.1%** carried debt exceeding $150,000.

### Resource Utilization

Despite high stress levels, only **43.5%** had used WSBA well-being resources, with stigma and lack of awareness cited as barriers.

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# Law Students and Lawyer Practice Type

## Law Student and New Member Workgroup

**Susan Lee (Chair), Bushra Rahim, Justice Raquel Montoya-Lewis, Gerald Heppler, Phillip Lentz, Adely Ruiz**

## Overview

The Law Student and New Member Workgroup's approach incorporates a thorough review of existing research, new data collection via targeted outreach, and the formulation of actionable recommendations. As part of its research, the workgroup reviewed national and institutional studies. The full listing of literature reviewed can be found in Appendix F.

## WSBA Well-Being Survey Insights

Results for New Member respondents were segmented and compared to the responses for all respondents (general legal population). The analysis revealed significant well-being challenges for the New Member population compared to the general legal population:

- **Higher Workload**: New Member respondents reported billing 31-40 hours per week at a rate of **18.4%**, compared to **11.9%** of the general legal population. For 41-50 hours/week, **15.4%** of New Member respondents fell into this category compared to **6.3%** of the general legal population.
- **More Frequent Worry Over Billable Hours:** 30.4% of New Member respondents reported worrying about billable hours daily, compared to **15.3%** of the general legal population.
- **Significantly Higher Law School Debt:** 46.1% of New Member respondents reported graduating with more than **$150,000** in law school debt, compared to only **14.9%** of the general legal population.

These results indicate an outsized burden on new lawyers, compounding the stressors identified in the literature and reinforcing the urgency of targeted well-being interventions.

## Supplemental Survey Questions and Purpose

The survey aimed to identify key wellness challenges and opportunities in the legal field. The survey was also distributed to new practitioners within the broader WSBA community. We received 24 responses. Each question's rationale and purpose were discussed at length among workgroup members:

1. **What does wellness mean to you?**
   Purpose: To establish a baseline understanding of how participants perceive wellness.
2. **Do the available wellness services seem approachable? Why or why not?**
   Purpose: To evaluate accessibility and stigma surrounding existing wellness and mental health services.
3. **Are there barriers preventing you from using wellness services?**
   Purpose: To identify obstacles, including work/office culture, billable hours demand precluding regular use of wellness services, and systemic expectations.
4. **Has utilizing wellness services improved your performance as a student or practitioner? How?**
   Purpose: To determine if wellness services have a measurable impact on performance and resilience.

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5. **How could the legal field better embrace your definition of wellness?**
   Purpose: To explore cultural and structural changes that could enhance well-being by expanding traditional definitions of wellness.

## Supplemental Survey Distribution and Results

A link to the supplemental survey was shared with key stakeholders and specific individuals within our target demographic. Specifically, the survey went to law students from Gonzaga Law, Seattle University School of Law, and the University of Washington School of Law.

### KEY INSIGHTS:

- Wellness defined as balance, mental clarity, and self-care
- Barriers included stigma, lack of time, institutional norms
- Desire for more visible and culturally integrated wellness support
- Positive impact of wellness services when accessed

The results underscored the importance of well-being for students and new members. Respondents consistently defined wellness as a state of overall health and balance—mental, physical, and emotional—supported by time, relationships, and freedom from overwhelming stress or financial strain. One participant captured this sentiment by stating that wellness allows individuals "to enjoy life and pursue fulfillment within one's reality."

Despite the shared value, the findings revealed notable barriers:

- **29%** of respondents reported gaps in access and awareness, saying they are "not sure what is available," find it "intimidating to go the first time," and expressed a desire for clearer paths to services.
- **20%** identified time and workload as obstacles, citing "no time to research," an "overbearing work culture," and the need for "stronger and stricter boundaries between school/work and personal life."
- **16%** called for systemic and cultural reform, emphasizing the need to reduce stigma around therapy." Another respondent reinforced this by urging the profession to "normalize therapy."

## Recommendations

The workgroup developed a four-stage progression and additional recommendations.

### FOUR-STAGE PROGRESSION

#### 1. Provide General Support

- Offer presentations on stress, anxiety, depression, substance use, suicidality, addiction, interpersonal effectiveness, empathy, community building, boundary setting, motivation and focus, sleep and diet hygiene
- Establish a calendar of events aligned with industry trends
- Develop mental health support packages for self-use

#### 2. Foster Connection to Resources

- Explore and document targeted resources within and outside of WSBA
- Provide insight into legal culture to bridge communication with decision makers

#### 3. Facilitate Community Building

- Collaborate intentionally on programming
- Recruit external experts for presentations (legal professionals, substance use consultants, organizational psychologists) targeted to support new members
- Develop peer support groups, yoga classes, allyship initiatives
- Explore a formal mentorship program for new members

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### 4. Cultivate Culture Change

- Encourage myth-busting and resilience models
- Provide opportunities for interpersonal mediation and crisis prevention
- Normalize holistic care for legal professionals
- The workgroup suggests WSBA flag these recommendations to the Washington New Member Committee and New Member Education Program

### ADDITIONAL RECOMMENDATIONS

### 5. Implement Well-Being Curriculum in Law Schools

- Mandatory well-being course at the start of law school and annually thereafter[5]

### 6. Provide Well-Being CLEs

- Deliver more CLE credits to support practitioner well-being

## Private Practice Workgroup

**Annasara Purcell (Chair), Melissa Berry, Dan Crystal, Darcel Lobo, Kyle Sciuchetti, Melissa Jaffe, Aaron Paker.**

## Overview

The Private Practice Workgroup examined well-being challenges for lawyers in solo/small, medium, and large firms through survey data and a supplemental solo/small firm practice survey, and review of other states' initiatives. These findings informed recommendations aimed at addressing systemic and cultural barriers to well-being.

## WSBA Well-Being Survey Results

The WSBA well-being survey results made clear that private practice is not a monolith and lawyers working for different types of private practice firms face significantly different issues. Lawyers running their own solo practice, for example, report working slightly less hours than the general lawyer population and experiencing less depression on average. These lawyers, however, did report having fewer employer resources to help with well-being.

On the other end of the spectrum, lawyers who worked for medium to large firms were more likely to be expected to bill more than 1,701 hours per year, and lawyers with higher billing expectations were more likely to experience an array of negative well-being outcomes (including feelings of burnout, considering leaving the profession, and higher levels of concern about their substance use). Litigators reported having greater levels of distress when compared to non-litigator groups: they reported a higher rate of concern that work causes alcohol consumption, a 13% higher rate of exposure to traumatic content, and less sleep than the non-litigation group.

Nonetheless, two important commonalities emerged across all private practice lawyer sub-groups. First, stigma around mental health challenges or substance use disorder poses a major barrier to seeking treatment.

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5. We note that ABA Standard 508 provides a law school shall provide all its students, regardless of enrollment or scheduling option, with information on law student well-being resources. 2025-2026 Standards Chapter 5

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Respondents overwhelmingly stated that they would not consider disclosing any sort of mental health or substance use challenge to their colleagues for fear of repercussions. As one respondent put it, "Very bad idea to tell a supervisor you are struggling with mental health or substance abuse issues. Even an empathetic supervisor is looking at the bottom line, your productivity, and your potential replacement." Thus, in spite of the increased emphasis that many employers have put on well-being in the past decade, most lawyers remain skeptical that their employer would offer meaningful support if that undermined profitability.

Second, while respondents offered suggestions for how to improve well-being within the profession, many respondents also stated that they viewed the problems as intractable. Many respondents suggested that the biggest barriers to well-being were not imposed by employers or courts but instead were the inevitable result of the legal profession attracting perfectionistic, high-stress individuals and putting them in adversarial proceedings against one another. As one respondent stated, "Depression and anxiety is inherent in the perfectionist adversarial system we work within. So long as the system remains the same, and lawyers have to fight with one another for their clients and be constantly concerned about making mistakes, the profession will continue to have lawyers struggling with depression, anxiety, and substance abuse." These responses suggest that although offering new specific resources might be helpful for lawyers, it is equally important to systemically normalize mistake-making while also continuing to promote civility within the profession.

## Private Practice Work Group Supplemental Survey Results

To supplement the Well-Being Survey the Work Group prepared and distributed a seven-question survey to attendees of the 2024 Solo/Small Practice conference and received twenty-six responses. The supplemental survey provided deeper insight into unique stressors and resource gaps.

Respondents identified **practice management stress (50%)** and **isolation (31%)** as the most significant barriers to well-being. While many cited freedom and autonomy as positive aspects of solo practice, these benefits were overshadowed by the strain of running a business and the absence of collegial support.

Resource utilization patterns were telling: CLEs were the most commonly accessed WSBA resource. Very few respondents reported using peer advising or mental health services—largely due to stigma and confidentiality concerns. When asked what resources would most improve their well-being, lawyers expressed strong interest in **gym partnerships (53%)**, **anonymous professional directories (42%)**, and **published "stories from the trenches" (42%)** featuring candid narratives from peers.

Comments revealed the emotional toll of isolation and the desire for community:

> ***"I often feel like I'm practicing in a vacuum. There's no one to bounce ideas off or share the stress."***

> ***"Managing the business side of my practice is overwhelming—I spend more time on admin than on law."***

These findings highlight the need for programs that reduce isolation, normalize help-seeking, and provide practical tools for managing both the emotional and operational demands of solo and small firm practice.

## Common Themes and Conclusions

Several overarching themes emerged from both surveys and workgroup discussions. Stigma remains a pervasive barrier, preventing lawyers from seeking help for mental health or substance use concerns. Many respondents

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expressed fear that disclosure could harm their reputation or career, reinforcing the need for confidential and anonymous resources. Isolation, particularly among solo and small firm practitioners, was identified as a significant contributor to stress and burnout. Respondents emphasized that programs fostering connection, even those not explicitly well-being focused, can have a meaningful impact on well-being.

Additionally, cultural factors within the profession, such as adversarial norms, perfectionism, and billable hour pressures were repeatedly cited as drivers of stress. These systemic issues cannot be solved by individual effort alone; they require organizational and community-level interventions. The workgroup concluded that addressing these themes through education, mentorship, and employer engagement is essential to creating a sustainable culture of well-being.

## Recommendations

1. **Make more CLEs focused on well-being available and make one such CLE per year mandatory**
   Through well-being-focused CLEs, law firms and WSBA can equip lawyers with tools and knowledge they need to maintain their mental health and resilience in the face of an inherently high-stress career. These CLEs could address topics such as stress management, mindfulness, burnout prevention, and work-life balance. The WSBA currently offers four complementary programs each year: a one-credit free CLE on well-being ethics, two Legal Lunchbox CLEs, and a free CLE during Well-Being in Law Week. At minimum, WSBA should maintain this level of free programming and explore expanding it further. A WSBA well-being MCLE requirement of at least one well-being CLE credit annually would help reduce stigma and signal that mental health is as important as legal skills, encouraging lawyers to seek support without fear of judgment.

2. **Publish "Stories from the Trenches"**
   Access to real-life narratives from lawyers about their struggles and successes with well-being through publication in *Bar News* or the WSBA website (anonymous or attributed) would help members feel less isolated and foster a culture of openness. These stories should cover diverse topics, including mental health, substance use, and resilience strategies.

3. **Make well-being resources available without a login**
   Fear of stigma prevents many lawyers from accessing WSBA well-being resources that require login or direct contact. Publishing a list of vetted well-being professionals—therapists, counselors, coaches—without login requirements that could appear in *Bar News* or on the WSBA website would ensure confidentiality and ease of access.

4. **Create programs to build community and support for Small/Solo Practices**
   Isolation was cited as a major barrier by **31%** of solo/small firm respondents. The WSBA should create programs that foster connection, such as small-group coaching, local networking events, and WSBA-sponsored discounts for well-being services like gyms and counseling. These initiatives would provide both professional and personal support, reducing loneliness and stress.

5. **Develop a mentorship program for new lawyers**
   Mentorship is a proven strategy to reduce isolation and support new lawyers. The WSBA should create a structured mentoring program pairing all newly minted lawyers with experienced lawyers for 12–18 months. Features should include CLE credit for participants, a uniform curriculum, individualized plans, and mentor training that incorporates Mental Health First Aid. Group mentoring options should also be offered to build community.

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6. **Implement a Well-Being Pledge with resourcing from WSBA**
Employer policies significantly influence lawyer well-being. The WSBA should adopt a program modeled on Colorado's Well-Being Pledge, which provides resources, guidance, and recognition for firms that commit to promoting flexibility, civility, and mental health support. This initiative would encourage systemic change and accountability within private practice environments.

# Government and Public Interest Workgroup

**Judge Michael Finkle (Chair), Melissa Berry, Justin Bingham, Marci Comeau, Marlene Otero, Kevin Plachy, Kyle Sciuchetti.**

## Overview

The Government and Public Interest Workgroup focused on identifying well-being issues specific to lawyers in government or legal aid settings. This includes criminal prosecution and defense, civil practice representing government entities, legal aid, and other public interest contexts, including Qualified Legal Service Providers within Washington. These lawyers are referred to throughout this report as "GPI lawyers."

Government lawyers work in environments that differ markedly from private practice. Public interest lawyers often deal with difficult subject matter, including criminal law, family defense, immigration, and other areas that place enormous strain on the lawyer. As one survey respondent stated:

> ***"We can't discuss our client issues with mental health professionals because of client confidentiality. It all just lives in my head... what people have done to each other eats at my soul like cancer."***

The GPI carried out its mission with a two-pronged approach:

1. Examine the results of the WSBA Well-Being Survey and determine whether there were significant differences in survey answers between GPI lawyers and all other lawyers answering the survey ("general population").
2. Develop a supplemental well-being survey that explored issues unique to GPI lawyers.

## Key Findings from WSBA Well-Being Survey

The workgroup gleaned some important information by exploring marked differences in how GPI lawyers responded to the general survey compared to the general population (i.e. all respondents). Those differences highlight both well-being drawbacks to GPI lawyers and well-being advantages for GPI lawyers compared to their counterparts.

- **Demographics:** Higher proportion of younger and women lawyers in GPI roles; lower percentage of White lawyers than general population.
- **Work Schedule:** GPI lawyers reported working a standard work week of 40-44 hours
- **Burnout:** GPI lawyers considered leaving the profession at rates 10% higher than general population lawyers.
- **Stress and Trauma:** GPI lawyers experience more job-related trauma and compassion fatigue, impacting well-being outside of work.
- **Financial Strain:** Student loan debt and low salaries significantly affect well-being.

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- **Positive Factors:** Mission-driven work, job stability, and camaraderie were cited as supports for well-being.

## GPI Supplemental Survey Questions and Methodology

The supplemental survey explored multiple dimensions of lawyer well-being. It asked respondents to assess how they prioritize well-being, the impact of compassion fatigue and vicarious trauma, and to identify factors negatively affecting their well-being from a provided list. Respondents ranked their current level of burnout on a scale of 1–10 and evaluated how organizational funding and personal finances — including student loan debt, cost of living, and lower salaries — affect stress and well-being. The supplemental survey also examined participation in the Public Service Loan Forgiveness (PSLF) program and its influence on well-being. The survey was distributed across multiple channels and list serves targeting government and public interest lawyers and received 53 responses.

The supplemental survey reveals a profession marked by both deep fulfillment and persistent strain. Respondents emphasized that mission-driven work, job stability, and supportive colleagues were central to their well-being, helping to balance the pressures of their roles. Many found meaning in serving the public and valued the opportunity to do impactful legal work. The PSLF program played a notable role, with a majority citing it as either a motivator for entering the field or a crucial support that made staying in public service feasible. However, concerns about the current state of PSLF and its reliability raise significant well-being implications for public service lawyers.

At the same time, the data points to systemic impediments that hinder sustainability in these roles. Lawyers reported low salaries, long hours, and emotional exhaustion as major stressors—conditions compounded by underinvestment in well-being infrastructure and inequitable workplace expectations. Chronic underfunding and lack of institutional support contribute to burnout and turnover. While purpose drives this workforce, meaningful reform is needed to ensure that public interest lawyers can continue to serve effectively and sustainably.

## Key Findings

Several key drivers of professional satisfaction emerged as significant supports for practitioner well-being. A substantial majority of respondents (**83%**) identified mission-driven work as a primary contributor to their mental health, while **77%** cited the importance of job stability. Furthermore, **71%** of those surveyed highlighted professional camaraderie as a critical factor in maintaining a healthy work environment. Financial incentives also play a structural role in retention and stability, with over **60%** of respondents noting that the Public Service Loan Forgiveness (PSLF) program directly influenced their decision to remain in public service roles.

The following data highlights the primary negative factors and systemic stressors currently undermining attorney well-being and retention. A significant majority of respondents (**76%**) identified low salary as a primary barrier to professional sustainability, while **69%** cited the prevalence of long work hours as a recurring challenge. Beyond these structural issues, the emotional toll of legal practice is evident: **62%** of practitioners reported burnout stemming from compassion fatigue, with **33%** specifically noting its negative impact on their overall well-being. Additionally, **29%** identified vicarious trauma as a significant factor impeding their professional health, suggesting a critical need for enhanced psychological support and trauma-informed management within the bar.

## Common Themes and Conclusions

The supplemental survey underscores a dual reality: public interest lawyers derive profound meaning from their work yet face structural and emotional challenges

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that threaten long-term sustainability. Mission-driven work and collegial support are strong protective factors, but they are offset by chronic underfunding, high caseloads, and low salaries. Compassion fatigue and vicarious trauma are prevalent, particularly among those handling sensitive or traumatic cases, and these stressors often lead to burnout and attrition.

Financial strain, including student loan debt and cost-of-living pressures, further compounds stress, even for those participating in PSLF. Respondents expressed concern about the uncertainty surrounding PSLF and its impact on career decisions. Additionally, stigma around mental health persists, with lawyers fearing that seeking treatment could jeopardize their license or professional standing. Addressing these systemic issues requires coordinated efforts to improve working conditions, provide targeted well-being resources, and advocate for structural reforms that reduce excessive workloads and inequitable expectations.

## Recommendations

The GPI identified potential areas for increasing lawyer well-being that encompass the whole person. Recommendations include:

1. **Improve Working Conditions and Court Rules**
   Advocate for reforms in court rules to reduce unhealthy filing deadlines and conflicting trial schedules. Increase judicial training to enhance professionalism and civility in the courtroom, reducing stress for GPI lawyers.

2. **Develop Well-being Support Programs Targeted to GPI Lawyers**
   Focus WSBA Member Wellness Program resources on addressing secondary trauma and compassion fatigue. Provide robust education and support tailored to the unique challenges faced by GPI lawyers, including tools for managing emotional exhaustion.

3. **Create Mutual Support Programs**
   Recruit and train WSBA peer advisors to help GPI lawyers manage stress, burnout, and trauma. Maintain an accessible directory of organizations offering mutual support programs, such as Washington Lawyers Assisting Lawyers, to foster community and resilience.

4. **Expand Mental Health Education and Resources**
   Provide education to dispel stigma and clarify that seeking mental health treatment will not result in disciplinary action. Promote mental health resources broadly and accessibly. As one supplemental survey respondent noted, *"There seems to still be a feeling among Bar members with mental or behavioral health disorders that taking leaves of absence, seeking alternative treatments, or admitting to needing treatment... may lead to a determination that they are unfit to practice law."* WSBA should communicate clearly—through rules, standards, and outreach—that seeking help is safe and encouraged.

5. **Offer Physical Well-being Support Programs**
   Examine the feasibility of partnering with gyms or well-being providers to offer discounted memberships. Encourage physical activity as a proven method to reduce stress and burnout, contributing to increased effectiveness in legal practice. Nearly 55% of public interest lawyers indicated this resource could support their well-being.

6. **Reduce Caseloads**
   Advocate for manageable caseload standards to alleviate stress and improve retention. High caseloads are driving many public interest lawyers, particularly prosecutors and public defenders, out of the field. WSBA has issued updated criminal defense caseload standards, and the Washington Supreme Court has revised its standards. While

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implementation remains challenging, WSBA can convene stakeholders—including public defense employers and judicial administrators—to address these issues and emphasize the link between excessive workloads and lawyer burnout, suicide, and substance use.

**7. Develop Best Practices Toolkit**

Create toolkits for GPI lawyers outlining client expectations, timelines, and strategies for managing trauma and stress. Partner with Qualified Legal Service Providers and agencies like Office of Public Defense to deliver training and practical resources.

# Judiciary Workgroup

**Judge Michael Finkle (Chair), Emily Arneson, Dan Crystal, Susannah Kanther, Judge Sonia Rodriguez-True, Sara Smucker Barnwell.**

## Overview

The Judiciary Workgroup focused on identifying well-being issues unique to judges across all levels; Municipal, District, Superior Courts, the Court of Appeals, and the Supreme Court. Two workgroup members also serve on the Judicial Assistance Services Program (JASP) which provides confidential peer support to judges facing mental health, substance use, or other challenges. The workgroup's mission was to develop recommendations to improve judicial well-being through a multi-pronged approach: creating a supplemental survey to explore issues unique to judges, analyzing WSBA Well-Being Survey data for judicial trends, reviewing extensive written comments for qualitative insights, and conducting a literature review of judicial well-being research.

## Overlapping Concerns that Affect the Judiciary

Judges serve in courts with varying resources, creating disparities in administrative support and access to specialized proceedings. On-call warrant duty often requires judges to be available 24/7, disrupting sleep and family life. Governance structures based on seniority can leave newer judges feeling excluded from decision-making. Security concerns remain pressing, with judges exposed to threats and lacking adequate protections such as secure parking or courthouse access.

## Literature Review

National and international studies corroborate these findings. The ABA's *Stress and Resiliency in the U.S. Judiciary* (2020)[6] and the United Nations' *Global Judiciary Integrity Network Survey* (2022)[7] highlight similar stressors: isolation, decision burden, and safety concerns. Both studies emphasize the need for confidential mental health support and cultural change to normalize help-seeking. Washington's JASP program aligns with these recommendations, offering peer counseling and professional therapy as valued resources.

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6. *Stress and Resiliency in the U.S. Judiciary*, Journal of the Professional Lawyer (2020).
7. *Exploring Linkages Between Judicial Well-Being and Judicial Integrity*, United Nations 2022 Survey, Office of Drugs and Crime – Global Judiciary Integrity Network (March 2022).

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In the State of Judges Well-Being: a Report on the 2019 National Judicial Stress and Resiliency Survey[8] the survey revealed distressing degrees of trauma, insomnia, depression, burnout and suicidal ideation among judges. This led the workgroup to ask specific questions in drafting a supplemental survey.

## Judicial Themes Reflected in the WSBA Well-Being Survey

Survey data and narrative responses reveal a judiciary deeply committed to public service but operating under conditions of chronic stress, isolation, and structural barriers to help-seeking.

Burnout among judges shows a polarized pattern: nearly one-third report feeling burned out daily or regularly, while a similar proportion report burnout rarely or never. This suggests a culture that suppresses moderate expressions of distress, leaving judges either to normalize chronic pressure or endure it until severe.

Despite high stress levels, judges are less likely than lawyers to consider leaving the profession, constrained by structural factors such as fixed terms, re-election pressures, pension systems, and public visibility. Financial stress plays a smaller role for judges compared to lawyers, but economic security does not protect against trauma exposure or suicidal ideation.

Narrative responses reflected experiences of heightened scrutiny, interruptions, and reputational risk when seeking help. One judge noted, *"Judges who talk about stress are seen as weak."* Another shared, *"I have a mental illness I keep to myself because it would end my career."* These comments underscore the stigma surrounding mental health care. These experiences were more pronounced among, though certainly not limited to, women judges.

Institutional factors—such as relentless workloads, after-hours warrant duty, limited administrative support, and inconsistent onboarding—compound stress and erode work-life boundaries. Judges reported impaired concentration, decision fatigue, and intrusive rumination following high-stakes rulings, symptoms consistent with chronic occupational stress and secondary trauma. As one judge described, *"The emergency conditions never end… you work extra hard every day just to keep up."* Another added, *"Decision fatigue. In a high-volume court, there is little time for research, contemplation and deliberation in decision-making."*

Isolation is a defining feature of judicial distress. Many judges lack meaningful collegial connection or mentorship, particularly in single-judge courts or among judges from communities that have been historically excluded from the profession. *"I expected a supportive bench; instead, I found silence,"* wrote one respondent. Others expressed frustration with inconsistent onboarding and mentorship, noting, *"Every new judicial officer should have a mentor/support on their bench and another mentor/support outside of their bench."*

Personal safety concerns and public scrutiny further exacerbate stress, with **80%** of judges reporting disturbing communications or threats and **60%** fearing for their families' safety. One judge shared, *"I was doxed after a release decision; the threats were terrifying."* Another lamented, *"It is frustrating being mischaracterized or attacked in the media and not being able to defend myself."*

In sum, judicial well-being is not simply a matter of personal resilience but of institutional design. Structural lock-in, stigma, and isolation magnify risk, underscoring

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**8.** *The State of Judges' Well-Being: A Report on the 2019 National Judicial Stress and Resiliency Survey*, Judicature Vol. 107 No. 1 (2023).

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the need for systemic, preventive, and culturally anchored reforms.

## Supplemental Survey Findings

The Judiciary Workgroup Survey was designed to capture factors influencing judicial well-being, including workload, mental health, collegiality, and institutional culture. Distributed to 631 judicial officers statewide in collaboration with WSBA, the Superior Court Judges Association, and the District and Municipal Court Judges Association, the survey achieved a strong **25%** response rate (156 responses).

### KEY RESPONDENT DEMOGRAPHICS INCLUDE:

- Superior Court judges accounted for **49%** of responses
- District Court judges for **27%**
- Municipal Court judges for **14%**
- **40%** of respondents had served less than five years
- **27%** had served 6–10 years
- **23%** had served 11–20 years
- **29%** of judges identified as members of underrepresented or marginalized groups, highlighting the importance of equity considerations in judicial well-being initiatives

While **92%** of judges reported being "very satisfied" or "mostly satisfied" with their career choice, the data reveal significant challenges to mental health and work-life balance. Judges described chronic stress, heavy caseloads, and emotional fatigue as defining features of their work. Reduced sleep was reported by 59% of respondents, compassion fatigue by 54%, and intrusive thoughts about decisions by 55%. Many judges noted that vacations offer little relief, as time off often results in overwhelming backlogs upon return. One judge observed: *"When I take time off, I have a choice of working during vacation or facing a HUGER backlog when I return."*

After-hours warrant duty emerged as a major stressor, with **79%** of judges handling search warrants outside normal hours. Nearly half (**48%**) reported reduced sleep quality as a result, and **23%** indicated decreased work performance the following day. Judges expressed frustration with this expectation, noting *"I hate doing search warrants,"* and emphasizing the need for rest to maintain judicial performance: *"Individuals deserve a judge in the courtroom who is fully alert."*

Emotional fatigue and vicarious trauma were also prevalent. Judges presiding over child welfare, sexual assault, and criminal cases reported symptoms consistent with secondary trauma, including depression, anxiety, and decision fatigue. **29%** of judges reported weekly challenges with concentration, and **7%** reported daily or continual struggles. One judge shared: *"Sometimes we know the back story, but the jury doesn't… it's emotionally exhausting."* Another reflected: *"When harm follows a decision I made, it affects me deeply even if it was legally correct."*

Isolation and lack of collegial connection were recurring themes. Judges in single-judge courts or from communities that are underrepresented and marginalized in the profession often feel socially and professionally disconnected. While most have colleagues they can call, time pressures and cultural norms in the legal profession limit meaningful interaction. Mentorship programs were described as inconsistent or ineffective, leaving new judges vulnerable to a "sink or swim" culture. Stigma around mental health remains a powerful inhibitor. Only **20%** of judges reported using sick leave for mental health, and just **15%** rely on mental health professionals. Many fear that seeking help could damage their reputation or re-election chances.

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Institutional culture and leadership gaps further compound stress. Some benches were described as toxic or cliquish, with poor communication and favoritism. Judges requested feedback systems and presiding judge evaluations to prevent misuse of authority. Comments included, *"Presiding judges can be tyrants; there's no check on that,"* and *"Our culture rewards martyrdom—whoever works the most is seen as the best."*

Finally, personal safety and public scrutiny emerged as significant concerns. Elected judges reported heightened anxiety during election cycles, with **57%** endorsing impacts on family life. These findings paint a vivid picture of a judiciary that remains deeply committed to public service but faces systemic and cultural challenges that demand urgent attention.

## Recommendations

1. **Establish Onboarding and Mentorship**
   Adopt a formalized mentorship program for new and experienced judges. Pair mentors and mentees based on needs and experience, even across different court levels, to provide consistent support and guidance.

2. **Expand Judicial College**
   Extend Judicial College to two weeks, possibly split into two one-week sessions. Include sessions on caseload management, mindfulness, and court calendar administration, along with practical training on what judges can do—not just what they should avoid.

3. **Address Warrant Duty**
   Develop rotating schedules for after-hours warrant duty across all judges in a county, ensuring on-call duty counts as a judicial day. Encourage courts to allow judges time off the following morning to recover, promoting safety and performance.

4. **Enhance Security and Safety**
   Add Judicial College sessions on handling threats and disturbing communications. Consider statewide tracking of threats through the Administrative Office of the Courts and explore security upgrades such as cameras and secure parking.

5. **Study Workload and Advocate for Resources**
   Conduct a study tracking hours worked beyond court sessions to quantify workload demands. Use this data to advocate for additional judicial resources and staffing.

6. **Expand Access to Resources for Smaller Jurisdictions**
   Support legislation enabling courts to contract across jurisdictions for specialized proceedings, such as competency hearings and therapeutic courts, ensuring equitable access to resources statewide.

7. **Promote Respectful Appellate Opinions**
   Encourage appellate courts to adopt language that respects trial judges when overturning decisions. Communicate this cultural shift through articles and judicial trainings.

8. **Prioritize Judicial Well-being**
   Integrate well-being sessions into judicial conferences as plenary topics. Encourage monthly gatherings for judges within each county to foster collegiality. Broaden JASP's role to include confidential problem-solving and support for new judges.

## Conclusion

Serving as a judge is a high-pressure job that combines public visibility with profound solitude. These recommendations aim to address the unique challenges judges face, beyond those experienced by lawyers, by fostering systemic reforms and cultural change to improve judicial well-being.

# Critical Issues Across the Profession

## Suicide and Addiction Workgroup

**Emily Arneson (Chair), Dan Crystal, Laura Moss, M.D., Aaron Paker, Annasara Purcell, Bushra Rahim, Sara Smucker Barnwell, Jenn Stuber.**

### Overview

The Suicide and Addiction Workgroup was formed to examine the prevalence of substance use disorders and suicide among lawyers in Washington State. Unlike workgroups focused on practice domains, the workgroup addressed urgent forms of suffering in the profession. As a supplement to the WSBA Well-Being Survey, the workgroup designed and implemented a confidential survey focused on suicide and addiction.

The purpose of which was to better understand the scope and nature of suicide risk, alcohol, and substance use in the profession — issues often underreported due to stigma, fear of professional consequences, and cultural norms emphasizing self-sufficiency and not asking for help.

### Exploring the Interrelationships

Research indicates strong correlations among burnout, anxiety, depression, substance misuse, and suicidal thinking. Among physicians, burnout is tightly linked to depression, anxiety, suicidality, and substance abuse.[9] Preventive interventions that address early-stage distress are therefore essential to reduce later-stage substance misuse and suicidal behavior. Suicidal behavior is best understood as a continuum running from ideation, intent, attempt to completion. Notably, between one quarter and one half of individuals in treatment for substance use disorders report suicidal ideation,[10] and substance use disorders amplify suicidal behavior in the general population, with lifetime suicide attempt rates ranging from 16%–60% among those diagnosed.[11]

### Suicide in the Profession

Lawyers face elevated risk of death by suicide. Nationally, the suicide rate among lawyers is eighth among working professionals.[12] In Washington, Department of Health data (inclusive of legal professionals such as paralegals and legal assistants) identified **55 suicides** between 2018 and 2023, meaning **30–36%** of injury-related deaths among legal professionals were suicides—markedly higher than

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**9.** Ryan (2023). *The relationship between physician burnout and depression, anxiety, suicidality and substance abuse: A mixed methods systematic review* – PubMed.

**10.** Andersson (2022). *Suicidal Ideation Among Inpatients with Substance Use Disorders: Prevalence, Correlates and Gender Differences* – ScienceDirect.

**11.** Leza (2024). *Substance Use Disorder and Lifetime Suicidal Behaviour: A Scoping Review* – PubMed.

**12.** Sussell A., Peterson C., Li J., Miniño A., Scott K.A., Stone D.M. *Suicide Rates by Industry and Occupation — National Vital Statistics System*, United States, 2021. MMWR Morb Mortal Wkly Rep 2023;72:1346–1350. DOI: http://dx.doi.org/10.15585/mmwr.mm7250a2.

**13.** WA Statewide Suicide Deaths, 2018–2023 (Years Combined), Demographics Compared to All Other Industry Suicides. Washington State Death Certificate Data. Washington State Department of Health.

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the **15–25%** seen in the general population.[13] Lawyers are significantly more likely to report suicidal ideation "several days" or "more than half the days" compared to the general population.[14] In addition, **17.5%** of lawyers met criteria for Major Depressive Disorder versus **8.3%** in the general population.[15] Converging evidence identifies high work overcommitment, perceived stress, and loneliness as key predictors of suicidal thinking.[16] Studies also show that legal professionals are less likely to seek help—partly due to fear of discipline or reputational harm.[17] The workgroup's findings among WSBA members corroborates these patterns.

## Substance Use Among Lawyers

In 2016, Krill et al. surveyed 12,825 lawyers across 15 states and found that 20.6% reported problematic drinking, versus 11.8% of the general population.[18] Granular data on illicit drug use remains limited. Krill's follow-up, *Stress, Drink, Leave,* surveying **2,863** California and D.C. lawyers, found women reporting greater severity of mental health symptoms and alcohol use than men; women with problem drinking were more likely to consider leaving the profession (**25%** vs. **17%** for men).[19] Reasons diverged by gender: women cited work–family conflict most often; men cited work overcommitment.

## WSBA Well-Being Survey Results

The WSBA Well-Being Survey included six questions on alcohol, substance use, and suicide. One alarming finding: when asked, *"In the past 12 months, have you had suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm?"* **10%** said **yes** and **3%** preferred not to disclose. While ideation is more common than intent, it is a clear precursor and warrants clinical attention. Moreover, a **10–13%** ideation rate is more than double the rate in national studies.[20]

Of those endorsing suicidal ideation, **85%** indicated their work **somewhat** or **significantly** contributed to these thoughts. Alcohol-related responses were also concerning. To *"Do you ever feel concerned about how much or how often you drink alcohol?"* **20%** said **yes** and **2%** preferred not to disclose, compared with **10.9%** concern in the general U.S. adult population.[21] **22%** reported abstaining from alcohol—dramatically lower than the **38%** national abstinence rate.[22]

Regarding the prevalence of alcohol at work events, **9%** said alcohol was *always* present at work social events, **61%** said *often or some of the time*, and **30%** said *never*. Comments from the survey suggested a shift from heavy social drinking to more private, at-home use. For instance, one respondent commented that "In this particular region, the culture of drinking heavily with colleagues is a thing of the past (1980s–early 2000s). … What I do see a bit of is people drinking or smoking at home after work, often alone."

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14. Thiese, M.S., Allen, J.A., Knudson, M., Free, K., Petersen, P. (2021). *Depressive Symptoms and Suicidal Ideation Among Lawyers and Other Law Professionals*. American College of Occupational and Environmental Medicine, pp. 381–386.
15. NIMH 2023 Major Depression – National Institute of Mental Health (NIMH).
16. Patrick Krill et al., *Stressed, Lonely, and Overcommitted*, 11 Healthcare 536 (2023).
17. Organ, J., Jaffe, D., Bender, K. *Suffering in Silence: The Survey of Law Student Well-Being and the Reluctance of Law Students to Seek Help for Substance Use and Mental Health Concerns*. Journal of Legal Education. 66:116-56.
18. Krill, P.R., Johnson, R., Albert, L. (2016). *The Prevalence of Substance Use and Other Mental Health Concerns Among American Lawyers*. J Addict Med. 10:46–52.
19. Krill (2021). *Stress, Drink, Leave: An Examination of Gender-Specific Risk Factors for Mental Health Problems and Attrition Among Licensed Lawyers*. PubMed.
20. Angelone, K.M. (2024) U.S. National Trends and Disparities in Suicidal Ideation, Suicide Attempts, and Health Care Use. Pew Research Center.
21. *Alcohol Use Disorder (AUD) in the United States: Age Groups and Demographic Characteristics*, National Institute on Alcohol Abuse and Alcoholism.
22. Brenan (2023) *More Than Six in 10 Americans Drink Alcohol.*

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Drug use was present but less prevalent. When asked, *"In the past 12 months, have you used drugs other than those prescribed for a current medical condition (i.e., recreational use)?"* **13%** said **yes** and **3%** preferred not to disclose. As with alcohol, **20%** expressed concern about their use. Despite perceptions of cannabis as lower risk, evidence links cannabis to worsened depression and anxiety and to cognitive impairment—challenging the assertion that it is safer relative to alcohol.

## Suicide and Addiction Supplemental Survey Findings

To understand stressors and barriers more deeply, the workgroup conducted a 14-question confidential mini-survey (distributed via WSBA affinity and county bar listservs and sections), yielding 195 responses. While not randomized, the qualitative dataset was rich. Unlike the general WSBA survey, where **7%** of responses came from lawyers in their first decade, **52%** of mini-survey respondents were in their first ten years, suggesting a younger cohort. Many comments provided granular insights into distress, stigma, and help-seeking preferences.

## Legal Practice and Professional Stressors

In Figure 1 below, participants identified multiple contributors to poor mental health and substance risk.

**The top five were:**

- **76.9%** adversarial process and incivility
- **72.8%** long work hours
- **59%** financial pressures
- **55.4%** culture of perfectionism
- **34.4%** unreasonable client demands

As one lawyer put it: *"Too many people treat the unreasonable demands of the profession like fraternity hazing—they had to go through it so everyone else should too, even though it's detrimental."*

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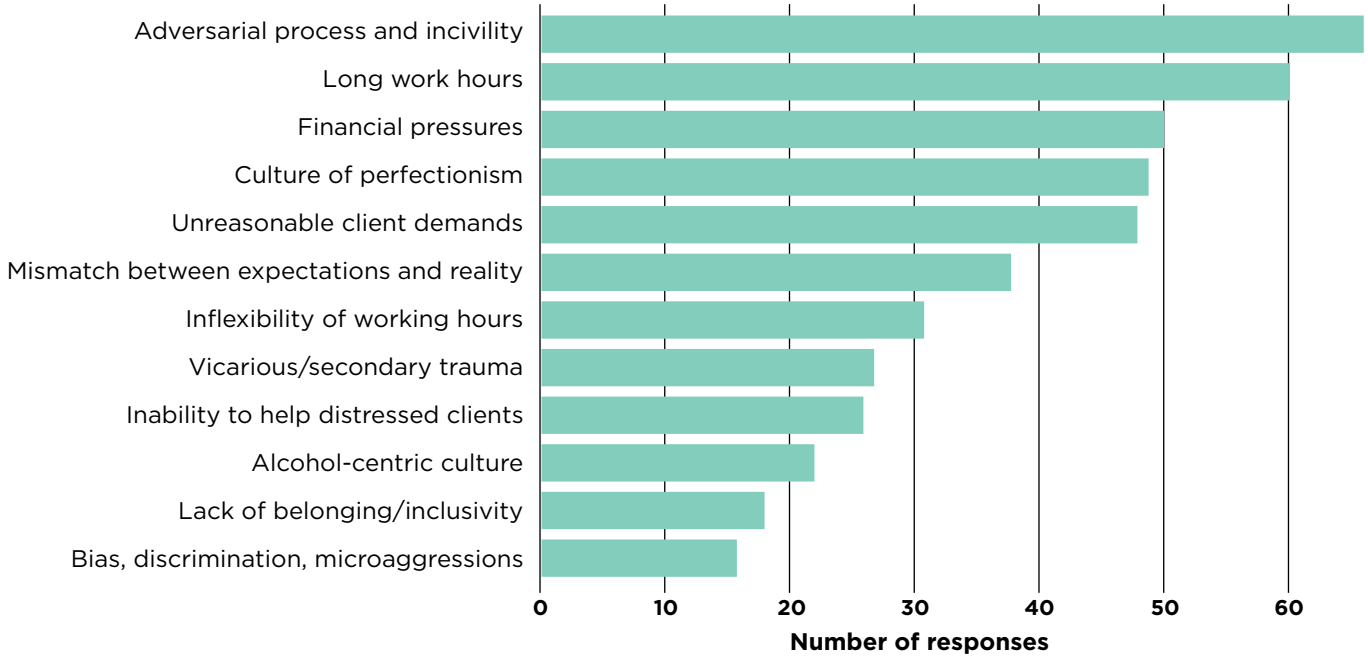
**FIGURE 1. Top Challenges Contributing to Mental Health/Substance Use Challenges**



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Respondents indicated workload intruded on home life: *"The main issue in my marriage is how much time I spend working and it has nearly led to divorce."*

Concerns over confidentiality contributed to isolation: *"I have no one I can talk to about what I'm going through." "When I am at home, I can't shut off my brain. I replay the horrible things I've seen and heard in my cases."*

Despite clear needs, formidable obstacles limited help-seeking. Barriers to support were related to fear of stigma and repercussions:

- **76.9%** time constraints
- **70.3%** stigma concerns
- **67.2%** denial
- **47.2%** cost of treatment
- **39%** concerns of professional consequences

In terms of care, respondents preferred:

- **81.5%** counseling
- **63.6%** family/friends
- **48.2%** general practitioner
- **57.9%** internet self-help
- **31.8%** peer conversations

Willingness to use WSBA resources was low:

- **16.9%** have utilized AA/NA or Peer Advisors
- **14.4%** have utilized WSBA Member Wellness Program
- **12.8%** have utilized formal rehab (12.8%)

These results suggest mistrust of institutional supports or misalignment with needs. As one lawyer remarked: *"Speaking with anyone at work or associated with WSBA could expose disclosure and retribution."*

Further reinforcing both the need for resources and the fear of open dialogue, a taskforce member's *Bar News* article sharing their own struggles with suicidal ideation prompted more than a dozen members to reach out, share their struggles, and express that fear of consequences made open dialogue feel risky.

## Comfort and Safety in the Workplace

**37%** would **not** feel comfortable taking medical leave for mental health or substance issues; another **20%** neither agreed nor disagreed. **27%** expected negative consequences (e.g., exclusion from advancement, demotion/dismissal, social exclusion) if they took leave, underscoring structural deterrents to care.

### Nowhere to Turn

When asked about trusted contacts in the event of self-harm or suicidal thoughts: **11%** reported **none**; **11%** reported **one**; **17%** reported **two**; **15%** reported **three**; **46%** reported **more than three**. Thus, a majority trusted **three or fewer** individuals with a topic as serious as suicide—highlighting isolation. One task force member recounted repeated suicide attempts before finding trusted allies who would not impose unwanted interventions; progress began when they chose to speak openly and seek help during difficult times.

### Calls for Systemic Reform and Cultural Change

Despite cynicism, many respondents expressed hope that WSBA could play a transformative role—providing trauma-informed resources, disentangling well-being from discipline, addressing workload imbalance, and increasing transparency. Suggestions included reinstating statewide in-person recovery gatherings, mandating mental health CLEs, and focusing on inclusion and equity. Overall, the qualitative data reveal real harm—painful isolation, unresolved trauma, and norms that discourage vulnerability—amplified by limited time, money, and trusted referrals. Many lawyers nonetheless offered concrete ideas: reshape employer expectations, expand WSBA trainings and services, and shift culture away from perfectionism and relentless demand.

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## Recommendations

### 1. Promote Communications & Culture Change

Normalize mental health and addiction conversations across the legal community, with firm leaders, judges, and bar section chairs modeling vulnerability and discussing well-being and recovery openly. Publicize confidentiality and the boundaries of WSBA well-being services to address mistrust, clarifying that Member Wellness Program services are separate from disciplinary bodies. Launch a WSBA-wide public education campaign using plain, inclusive language—reaching rural lawyers and lawyers of color—and make support services easily accessible without requiring direct contact with WSBA staff. Promote and expand the Well-Being Pledge so employers publicly commit to psychologically safe, non-punitive environments. Include firearm safety (lethal means safety and voluntary secure storage) in well-being messaging. Address professional isolation by facilitating spaces for connection, especially for solo practitioners, rural lawyers, and historically excluded groups. Reduce stigma around leave-taking by promoting model policies that explicitly protect behavioral health leave.

### 2. Develop Training & Education

Offer Mental Health First Aid regularly and at subsidized rates. Provide training in trauma-informed legal practice, especially for criminal, family, and public-service roles with high vicarious trauma exposure. Incorporate bystander intervention and peer support strategies into CLEs to empower colleagues to recognize and respond to distress. Incentivize well-being CLEs. Support supervisory training so leaders can identify burnout and respond supportively—not punitively.

### 3. Increase Access to Resources

Create an anonymous online directory of Washington-based therapists, prescribers, treatment centers, and support groups—without requiring access requests or identification. Expand after-hours and text-based crisis support to match long lawyer workdays. Subsidize mental health care via grants or partnerships (e.g., Department of Health, foundations), prioritizing legal professionals from underrepresented and marginalized communities and/or legal professionals from communities with highest barriers to receiving legal services, such as rural communities. Develop non-12-step and identity-responsive peer options (secular, culturally competent, affinity-based). Facilitate regional and identity-specific recovery networks to reduce isolation while protecting confidentiality.

### 4. Workplace and Structural Reform

Encourage offices to reform leave policies to explicitly cover mental health and substance use conditions and remove stigmatizing language. De-center alcohol in networking and professional events—provide guidance and alternatives for firms and bar sections. Promote workload/caseload reform, supporting WSBA and court-led efforts to examine excessive demands, particularly among public defenders and solo practitioners. Model supportive policies within WSBA leadership (mental health leave, flexible scheduling, well-being evaluations).

### 5. Policy and Research Initiatives

Use WSBA's convening power to promote reasonable workloads by engaging public-service employers and judicial administrators on connections among excessive workloads, burnout, suicide, and substance use. Integrate well-being considerations into WSBA policy reviews and strategic planning (licensing, ethics, professional responsibility, discipline). Track and publish member well-being trends, using Task Force surveys as a baseline and repeating every 3–5 years to measure progress. More effectively communicate the strength

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of the firewall between the WSBA Member Wellness Program and discipline. Leverage CLE authority to incentivize or require anti-stigma, help-seeking, and risk-recognition programming. Advocate for workplace mental health as a professionalism issue, framing chronic distress and substance use as competence concerns best addressed through support rather than punishment.

## Diversity, Equity and Inclusion Workgroup

**Susan Lee (Chair), Darcel Lobo, Adely Ruiz, Brian Seguin, Jerry Thomas.**

### Overview

The Diversity, Equity, and Inclusion Workgroup developed recommendations to enhance the well-being of historically marginalized and underrepresented members of the legal profession. The group reviewed research, analyzed WSBA survey data, and identified systemic barriers impacting well-being. The workgroup reviewed literature and gained information from key sources. A full listing of the literature and key sources can be found in Appendix F.

### Key Findings from the WSBA Well-Being Survey

The survey highlights significant disparities[23] in well-being among different population groups within the Washington legal profession. Members who identified as part of a community that is underrepresented in the profession (which includes respondents who indicated their race/ethnicity as something other than White/European Descent), reported the following:

- **Higher rates of stress, burnout, and emotional distress**
- **Greater negative impact from exposure to distressing material.**
- **Lower utilization of available mental health and well-being resources**

Key findings include:

**Daily/Regularly experience mental health struggles:**

- Minority group: **10% (daily)/24.8% (regularly)**
- General respondents: **8.8% (daily)/21.5% (regularly)**

**Considering leaving the profession due to mental health:**

- Minority group: **54.4%**
- General respondents: **49.7%**

**Regular anxiety symptoms:**

- Minority group: **20.9%**
- General respondents: **18.5%**

**Work significantly contributing to suicidal thoughts/ self-harm:**

- Minority group: **54.5%**
- General respondents: **36.9%**

**Exposure to distressing material:**

- Minority group: **39.4%**
- General respondents: **38.2%**

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**23.** The WSBA Equity and Justice Glossary defines disparity as an inequality in experiences or outcomes within the legal profession that historically impacts communities that have been historically excluded from the legal profession. These communities are of particular importance because they are known to experience social and economic disadvantage at higher rates than other populations due to documented histories of discrimination and marginalization within U.S. society.

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**Significant impact of distressing material:**

- Minority group: **27.3%**
- General respondents: **20.3%**

**Use of well-being resources:**

- Minority group: **47.8%**
- General respondents: **51.4%**

### KEY THEMES IDENTIFIED FROM LITERATURE REVIEW

- Persistent discrimination and exclusion contribute to discouragement and burnout.
- Progress in diversity remains slow and does not reflect Washington's demographics.
- Microaggressions and fear of retaliation are common barriers to reporting harmful experiences.

## Recommendations

### 1. Expand Research on DEI Experiences

- **Develop an ongoing, anonymous survey** capturing lived experiences of minority and marginalized legal professionals statewide.
- **Conduct a longitudinal study** to track progress, emerging challenges, and WSBA initiative impact.
- **Explore cultural factors** such as perfectionism, imposter syndrome, and their effect on well-being. Survey data shows minority lawyers experience higher stress, anxiety, and suicidal ideation than peers, underscoring the need for continuous monitoring and targeted interventions.

### 2. Create a Centralized WSBA DEI and Well-Being Resource Hub

- **Develop a dedicated platform** within the WSBA website centralizing resources on DEI, mental health, affinity groups, mentorship, and cultural competency.
- **Partner with affinity bar associations and law schools** to expand offerings and highlight exemplary programs. Minority lawyers report lower utilization of well-being resources; a centralized hub can improve access and visibility.

### 3. Offer Free CLEs and Trainings on DEI and Well-Being Issues

- Example: DiversityEDU's program on microaggressions, including pre- and post-assessments on unconscious bias, inclusion communication, and diversity engagement. CLEs can normalize conversations about bias and inclusion, reduce stigma, and equip lawyers with tools to foster equitable workplaces.

# Bar Association and Regulatory

## Member Wellness Program Workgroup

**Laura Moss (Chair), Melissa Berry, Dan Crystal, Rachelle Eason, Michelle Fontenot.**

### Overview

The Member Wellness Program Workgroup evaluated WSBA's Member Wellness Program, its history, services, survey feedback, and comparative models from other states. The goal was to identify strengths, gaps, and actionable improvements to better support WSBA members in a way that builds trust, increases utilization, and addresses systemic barriers to mental health care.

### Background: The Member Wellness Program

WSBA's Lawyer Assistance Program (LAP), established in 1990, was renamed the Member Wellness Program in 2015 to reflect its broader availability to non-lawyer members and its emphasis on holistic well-being. Initially focused on alcohol abuse, LAP provided long-term therapy near WSBA's Seattle offices and trained Peer Advisors to support lawyers struggling with addiction and other mental health challenges. An annual Chelan conference served as a key networking event for Peer Advisors, often including AA meetings.

Funding reductions in the 2010s led to staffing cuts and relocation under WSBA's Human Resources Department. For six years, clinical services were delivered through Employee Assistance Program contracts. In 2020, the program moved to the Advancement Department for greater alignment and was consolidated in 2021 with Professional Responsibility and Practice Management Assistance Programs to form the Ethics, Wellness, and Practice Team, whose mission is to enhance WSBA members' professional competence in service to the public.

Recent improvements include hiring a dedicated clinical staff member in 2020, adding lawyer-specific expertise, and adopting telehealth via Doxy for statewide access. Today, the Member Wellness Program team includes Dan Crystal, PsyD, Member Wellness Program Manager, and Adely Ruiz, LCSW, Clinical and Outreach Program Lead, under the leadership of Kevin Plachy, Advancement Department Director, a licensed lawyer, and Certified Wellness Practitioner (CWP).

The Member Wellness Program serves members, law students, prospective members, and retired lawyers. Services include individual clinical support and online groups such as:

- **Healing Minds** – Support for WSBA members
- **Pathways to Productivity** – Task management strategies
- **Career Guidance** – Job search support
- **Zen Meditation** – Noon-hour mindfulness

Education is central to the Member Wellness Program's mission. WSBA sponsors four free CLE programs annually, attracting an average of 1,500 online participants, and delivers 20+ presentations each year to law firms, government agencies, law schools, and county bars statewide.

The Member Wellness Program also maintains a

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network of 61 trained Peer Advisors who assist lawyers with issues ranging from addiction, the most common concern, to workplace hostility, career transitions, burnout, and retirement. The program supports the Office of Disciplinary Counsel Diversion Program by conducting evaluations and serving as Diversion Administrator, guiding respondents through compliance requirements such as counseling, CLEs, and ethics consultations.

In late 2024, **Washington Lawyers Assisting Lawyers (WaLAL)** was founded. WaLAL is a nonprofit that recruits Peer Advisors, hosts CLEs, and provides statewide presentations. This dual model—bar program plus nonprofit—exists in several states. The Member Wellness Program collaborates actively with WaLAL, sharing Peer Advisor resources and featuring Hagin as a CLE speaker.

## Member Well-Being Survey Findings

Survey data revealed widespread mental health challenges among WSBA members:

- **Burnout:** 58%
- **Anxiety:** 56.8%
- **Exposure to distressing material:** 38.3%
- **Alcohol concerns:** 20.4%
- **Depression:** 15.7%
- **Suicidal ideation:** 9.9%

These numbers confirm the urgent need for accessible, trusted, and culturally competent well-being resources.

**Limited awareness and utilization:** Only **43.5%** of respondents have used WSBA well-being resources. These include CLEs on well-being related topics; mental health consultations/brief therapy; peer advising; and referrals for services. Top reasons for non-use include lack of awareness, skepticism about effectiveness, and preference for other resources. Visibility and trust are critical barriers to engagement.

The **Suicide and Addiction Supplemental Survey** asked more direct questions about member perceptions of the Member Wellness Program. When asked which among ten resources they would turn to, **81.5%** indicated they would participate in counseling, but only **14.4%** endorsed using the Member Wellness Program. In addition, only **16.9%** of members indicated they would be willing to meet with a Peer Advisor or attend an AA meeting.

**Confidentiality concerns:** Despite APR 19(b) guaranteeing confidentiality, many members fear disciplinary repercussions. Comments included:

> ***"I would never contact the WSBA Member Wellness Program due to confidentiality and privacy concerns and potential impact on my license."***

> ***"I would have concerns accessing a program sponsored by the bar association for fear of information being provided to disciplinary boards."***

> ***"Speaking with anyone at work or associated with WSBA. Stigma, reputational damage, and impact on license and livelihood."***

This mistrust is rooted in WSBA's dual role as regulator and well-being provider. While confidentiality guarantees are advertised, members clearly do not trust or understand them, underscoring the need for stronger messaging.

To address these concerns, the Member Wellness Program follows a wellness-based model built on positive psychology principles. The program delivers presentations on imposter syndrome, confronting stigma, understanding perfectionism, managing high conflict workplaces, and cultural competency to name a few topics in this realm.

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**Desire for broader resources:** Members requested gym discounts, statewide referral lists, and more programming on practical topics like productivity, imposter syndrome, and boundary setting. Members want holistic support beyond crisis intervention.

## Contrasting the Washington Member Wellness Program with Other States

Comparing state Lawyer Assistance Programs (LAPs) is challenging due to variations in bar structure, funding, and membership size. The ABA Commission on Lawyer Assistance Programs last conducted a comprehensive survey in 2014, leaving gaps in current comparative data. Key observations from neighboring and comparable states include:

**Oregon:** Integrated bar with highly staffed program with five Lawyer-Counselors holding dual degrees and specialized expertise. Funded through the Professional Liability Fund and housed separately from the bar for added confidentiality. Offers frequent support groups, seasonal workshops, and robust outreach.

**Idaho:** Integrated bar with smaller membership. LAP managed by Southworth Associates, which handles calls of concern and refers to statewide treatment providers. Supported by a 16-member volunteer lawyer committee.

**Michigan:** Integrated bar with four counselors and strong ties to disciplinary diversion programs. Provides 50+ presentations annually and comprehensive evaluations for lawyers of concern.

**Texas:** Large integrated bar with extensive programming, including monthly virtual wellness CLEs, recovery story series, docket assistance pilot, and a private trust for treatment funding. Operates alongside a nonprofit (Texas Lawyers Concerned for Lawyers) hosting weekly addiction support meetings.

Compared to these programs, Washington's Member Wellness Program reflects a model that addresses multiple issues but lacks the depth of better-funded programs:

- **Clinical Emphasis:** Relies primarily on licensed staff clinicians as opposed to volunteers.
- **Presentation-Driven Outreach:** Offers free presentations but unclear if these increase service utilization.
- **Integrated Bar Structure:** Placement within WSBA generates skepticism due to confidentiality concerns.
- **Addiction Services:** Provides consultations but depends on external resources like Unbar and WaLAL for recovery groups.
- **Concerned About a Lawyer Cases:** Responds to reports but does not deploy volunteers for in-person outreach.

## Recommendations

### 1. Strengthen Confidentiality Messaging and Trust-Building

- Prominently display APR 19(b) confidentiality guarantees on the Member Wellness Program homepage and all outreach materials.
- Add a confidentiality tagline in every CLE, newsletter, and Bar News article.
- Consider branding adjustments to reduce perceived linkage to discipline.
- Include a clear FAQ on confidentiality and disciplinary separation.

### 2. Expand Education and Community Engagement

- Increase free CLE offerings on topics such as:
  > Task Management as Mental Health Management
  > Perfectionism and Imposter Syndrome
  > Boundary Setting

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> Mental Health First Aid
> Stories from the Trenches

- Restart the Annual Peer Advisor Conference to foster connection and normalize help-seeking.
- Organize MWP-coordinated service days with nonprofits to build community and reduce isolation.
- Collaborate with local bar associations for in-person networking and wellness events.

### 3. Improve Access to Referral Information

- Create a statewide directory of mental health providers accessible without contacting WSBA.
- Include guidance for culturally competent and identity-responsive providers.
- Assign responsibility for maintaining and updating the directory annually.

### 4. Promote Physical Well-Being

- Explore statewide gym discount partnerships and brand them as Member Wellness Program offerings (within the bounds of GR12 and Keller).
- Encourage local bar associations to host walking, hiking, biking, or running clubs.
- Sponsor step challenges or wellness competitions to promote engagement and camaraderie.

### 5. Address Cultural and Psychological Barriers

- Deliver presentations on imposter syndrome, perfectionism, and career progression cycles to normalize common struggles.
- Frame wellness as integral to competence and professionalism, not as a sign of weakness.

### 6. Rebuild Peer Support Infrastructure

- Expand Peer Advisor recruitment and training to include topics beyond addiction (e.g., burnout, workplace hostility, career transitions).
- Create warm handoff protocols between Peer Advisors and clinicians for seamless support.

## Rules and Regulatory Workgroup

**Kyle Sciuchetti (Chair), Arielle Adams, Justin Bingham, Kevin Bank, Nik Chourey, Doug Ende, Kevin Plachy.**

## Overview

The Rules and Regulatory Workgroup was tasked with examining court rules and regulatory functions that impact the legal profession in Washington and other jurisdictions. The goal was to develop recommendations that promote the well-being of legal professionals. Areas of review included:

- **Regulatory Functions:** Processes such as discipline, admissions, and character and fitness evaluations.
- **Policy and General Rules:** Broader rules that shape the profession (e.g., APR 19, Rules of Professional Conduct).

The workgroup's approach incorporated a thorough review of existing research, new data collection, and the formulation of actionable recommendations. The findings of the workgroup's research are provided below, followed by recommendations.

## Findings

### Discipline

As of 2023 approximately 35 U.S. jurisdictions have

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programs under which lawyer discipline complaints may be resolved through non-disciplinary diversion agreements.[24] These programs are typically contractual, requiring the lawyer to agree to conditions like:

- Professional counseling (for mental health/ substance abuse).
- Practice monitoring.
- Continuing Legal Education (CLE) tailored to the specific misconduct (e.g., trust accounting or office management).

This approach allows for a remedial resolution without a permanent public disciplinary record, aligning with the ABA's goal of regulation that protects the public while rehabilitating the lawyer.

The Washington Supreme Court adopted diversion rules in 2002.[25] For less serious misconduct, the WSBA Office of Disciplinary Counsel (ODC) may divert a grievance from discipline if the lawyer agrees to a diversion contract. A successfully completed diversion results in dismissal of the grievance. If the lawyer fails to complete the diversion contract, the grievance is reinstated and may result in public disciplinary action.

From 2020 to 2024 ODC opened 18, 16, 12, 14 and 9 new diversions.[26] Generally, the number of new diversions opened each year is declining. Because diversions allow members to complete a contractual agreement that could include completion of counseling programs, mental health treatment and other rehabilitative measures, the discipline system should prioritize identification of respondents with less serious misconduct who would benefit from a diversionary contract focused on rehabilitative measures. Additional findings regarding the discipline system can be found in the annual report.[27]

## Admissions and Character and Fitness

The workgroup received a presentation from WSBA Regulatory Counsel which outlined the steps the Regulatory Services Department has taken to address concerns with admissions procedures. After a review of these areas the workgroup found that Washington has already made significant progress, including:

- Removal of mental health questions in 2016 (APR 22.1(e) now governs follow-up inquiries related to health diagnoses and substance use)
- Addition of explanatory preambles to application sections
- Updates to application questions and response formats, including eliminating requirements for applicants or law schools to disclose leaves of absence
- Codifying the confidentiality of application materials under APR 1(d) and APR 24.1(d).

## Conditional Admission

Conditional admission is a process that allows bar applicants to be admitted to practice law under specific conditions for a limited period, typically up to five years, while demonstrating continued good conduct. This approach is used in approximately 29 jurisdictions and is generally applied in cases involving substance abuse, mental health challenges, criminal history, or

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**24.** State Bar of California, *Recommendations for Codifying a Formal Disciplinary Diversion Program* (Apr. 1, 2024), *available at* https://www.calbar.ca.gov/Portals/0/documents/reports/Recommendations-for-Codifying-a-Formal-Disciplinary-Diversion-Program.pdf.

**25.** *See* Title 6 of the Rules for Enforcement of Lawyer Conduct.

**26.** Washington State Bar Association. *Washington Discipline System Annual Report*. Seattle, WA: WSBA. 2022 and 2024 editions. *Available at* 2022-discipline-system-annual-report.pdf and 2024-wa-discipline-system-annual-report.pdf.

**27.** Washington State Bar Association. *Washington Discipline System Annual Report*. Seattle, WA: WSBA. 2022 and 2024 editions. *Available at* 2022-discipline-system-annual-report.pdf and 2024-wa-discipline-system-annual-report.pdf.

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financial issues. The goal is to provide a rehabilitative pathway for applicants who may have past conduct that raises concerns, but who show promise and a commitment to professional standards.

The Washington State Bar Licensure Task Force, through its Subcommittee on Ethics/Character and Fitness, recommended the implementation of a conditional admission process in Washington.[28] The recommendation was based on feedback from Character and Fitness Board members who expressed frustration at having to deny applicants they believed could succeed under monitored conditions. The Subcommittee emphasized that conditional admission would not be a barrier but rather a supportive mechanism for applicants on the cusp of full admission. This recommendation is currently under consideration by the Washington State Supreme Court.

### Policy and General Court Rules

The workgroup focused on several areas within this category including:

- Rules of Professional Conduct (RPCs) for potential revisions or commentary to raise awareness that well-being can affect a practitioner's ability to represent clients.
  - **RPC 1.1** (Competence)
  - **RPC 1.3** (Diligence)
  - **RPC 1.16** (Declining or Terminating Representation)
  - **RPC 8.3** (Reporting Professional Misconduct)

  *Note: The workgroup included Lawyer, Limited License Legal Technician and Limited Practice Officer RPCs within its scope of review.*
- Researched and received information about Oregon's State Lawyers Assistance Committee.

## Rules of Professional Conduct Findings

### RPC 1.1 (Competence)

The American Bar Association (ABA) proposed adding Comment [9] to Model Rule 1.1 of the ABA Model Rules of Professional Conduct to explicitly recognize that a lawyer's mental, emotional, and physical well-being may impact their ability to competently represent clients. The comment aimed to raise awareness about the connection between lawyer well-being and professional competence, without imposing new obligations.

The proposal was grounded in extensive research and policy work, including the ABA's 2018 Resolution 105 and the National Task Force on Lawyer Well-Being's report, which emphasized the need to destigmatize help-seeking ad promote wellness as a core component of professional responsibility.[29]

The proposal was ultimately withdrawn before reaching the floor of the ABA House of Delegates. Concerns were noted that the proposal could perpetuate stereotypes that lawyers with physical, mental, or emotional conditions are less competent and tying physical, mental, and emotional health with competence could be viewed as ableist.

Several jurisdictions have already taken steps to incorporate lawyer well-being into their professional conduct rules. For example:

Virginia added Comment [7] to its Rule 1.1, stating that a lawyer's mental, emotional, and physical well-being impacts their ability to represent clients and make responsible choices in practice.

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28. Washington State Bar Licensure Task Force Subcommittee on Ethics/Character Fitness. *Washington Character and Fitness Rules and Process: Analysis & Proposed Changes*. Submitted May 24, 2023. *Available at* Washington Character and Fitness Rules and Process Analysis Proposed Changes 101123.pdf.

29. ABA CPR Joint Initiative Working Group, et al., *Model Rule 1.1 – Proposed New Comment [9] Discussion Draft Resolution and Report* (Discussion Draft, Am. Bar Association).

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**Vermont** adopted Comment [9] to its Rule 1.1, emphasizing that well-being is essential to competence and encouraging lawyers to engage in self-care and preventive strategies.

**California** went further by incorporating well-being directly into the black letter of Rule 1.1(b), defining competence to include the mental, emotional, and physical ability necessary for legal service.

These examples demonstrate a growing recognition among state courts that lawyer well-being is integral to professional competence and public protection.

### RPC 1.3 (Diligence)

Model Rule 1.3 of the ABA Model Rules of Professional Conduct creates a duty that a lawyer shall act with reasonable diligence and promptness when representing a client. This duty requires the lawyer to pursue a client's matter despite personal inconvenience or opposition, demonstrating commitment and dedication to the client's interests with professional zeal. Comment [5] specifically addresses the duty of a sole practitioner regarding their well-being and the continuity of client matters. To prevent client neglect in the event of the lawyer's death or disability, Comment [5] says the duty of diligence may require a sole practitioner to prepare a plan designating another competent lawyer to review files and notify clients of the situation. The comment demonstrates that this planning step should be considered a critical part of maintaining the duty of diligence and safeguarding client interests.

Many states, including Iowa and Massachusetts, have adopted language identical or very similar to Comment [5], stating that a sole practitioner's duty of diligence may require them to prepare a plan to prevent the neglect of client matters in the event of their death or disability. Furthermore, some jurisdictions like Arizona and Iowa have gone beyond the ABA's comment by making a form of succession or contingency planning an affirmative court rule requirement for private practitioners, ensuring client protection upon the lawyer's sudden inability to practice. The workgroup notes that WSBA, as part of a large-scale revision to the Washington RPCs, suggested in 2003 that the Washington Supreme Court adopt Comment [5]; instead, the Court reserved Comment [5] without explanation.

### RPC 1.16 (Declining or Terminating Representation)

Washington RPC 1.16 (a)(2) requires withdrawal if "the lawyer's physical or mental condition materially impairs the lawyer's ability to represent the client." RPC 1.16(b) provides a list of circumstances under which a lawyer may withdraw from representation and RPC 1.16(b)(7) states a lawyer may withdraw if "other good cause for withdrawal exists." The workgroup members discussed the viability of an advisory opinion that would help to further explain what would constitute "other good cause" under the rule with particular emphasis on whether maintaining psychological well-being would qualify. It is the workgroup's understanding that the Committee on Professional Ethics has formed a subcommittee to explore this question.

### RPC 8.3 (Reporting Professional Misconduct)

During its research, the workgroup discovered the majority of U.S. jurisdictions require the mandatory reporting of professional misconduct by other lawyers, following the ABA Model Rule. Washington is part of a very small minority (including Georgia and, until recently, California) that uses the permissive word "should." Washington's RPC 8.3(a) states that a lawyer "should inform the appropriate professional authority."

## Oregon State Bar's State Lawyers Assistance Committee Findings

The Oregon State Bar's State Lawyers Assistance Committee (SLAC), established by legislative action

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under ORS 9.568, is a confidential and rehabilitative program designed to support lawyers whose performance or conduct may be impaired due to mental health challenges, substance use disorders, or other behavioral health issues such as gambling or sex addiction. SLAC operates under the authority of OSB Bylaws and Policies and has jurisdiction when there is a nexus between the impairment and the lawyer's ability to practice law. The program provides supervision, conducts assessments, and develops individualized remedial action plans. It also monitors lawyers on disciplinary probation, in diversion, or those conditionally admitted or reinstated. Importantly, SLAC's proceedings are confidential and exempt from public records laws, ensuring a safe and private pathway for intervention. However, if a SLAC respondent is found by SLAC to be noncompliant, such respondent would be referred to the OSB Disciplinary Counsel's Office for consideration of a formal and public disciplinary proceeding for failing to cooperate with SLAC, under Oregon Rule of Professional Conduct 8.1(c).

Washington State currently lacks a SLAC-equivalent program. While the WSBA Member Wellness Program offers voluntary support, it cannot compel engagement, and concerned parties have limited options; either report the lawyer to discipline or encourage the lawyer to voluntarily seek help. Given that Washington is not a mandatory reporting state, the absence of a formal mechanism to assist impaired lawyers represents a significant gap. A SLAC-style program would provide a structured, confidential, and rehabilitative alternative to discipline.

### Practice-Oriented Court Rules Findings

The workgroup examined whether to recommend changing filing deadlines from midnight to standard business hours. After research and discussion, the workgroup decided not to pursue this change, recognizing that flexible deadlines accommodate diverse work schedules and may better support practitioner well-being.

## Recommendations

1. **Discipline**
   The WSBA Office of Disciplinary Counsel should evaluate accessibility and utilization of diversion programs, prioritizing cases where mental or physical conditions or substance abuse contributed to less serious misconduct.

2. **Admissions**
   WSBA Regulatory Services Department should continue refining application questions; no further changes recommended at this time.

3. **Conditional Admission**
   Support implementation of a conditional admission process in Washington, with clear eligibility criteria and monitoring mechanisms.

4. **RPC 1.1 (Competence)**
   Investigate adopting a similar comment in Washington, engaging ethics committees and disability rights stakeholders.

5. **RPC 1.3 (Diligence)**
   Explore adopting Comment [5] and consider expanding its scope to all private practitioners.

6. **RPC 1.16 (Declining or Terminating Representation)**
   Support development of an advisory opinion clarifying "good cause" and "material impairment."

7. **RPC 8.3 (Reporting Professional Misconduct)**
   Retain permissive language but consider adding commentary referencing a SLAC-style committee if created.

8. **SLAC**
   Explore creation of a SLAC-equivalent in Washington through Supreme Court rulemaking; maintain MWP alongside SLAC as complementary programs.

# Looking Forward

## A Shared Responsibility for Well-Being

The findings across all workgroups reveal a fundamental truth: well-being in the legal profession is not an individual issue alone but rather a systemic imperative. Lawyers, judges, law students, employers, institutions, and professional organizations all share responsibility for creating environments that support mental health, resilience, and inclusion.

The recommendations in this Final Report are not isolated fixes; they form an interconnected framework for cultural and structural change. From Private Practice to Judiciary, from Law Student and New Member to Diversity, Equity, and Inclusion, and through the Member Wellness Program, each section underscores the need for coordinated action.

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### KEY THEMES ACROSS WORKGROUPS

1. **Normalize Help-Seeking and Reduce Stigma.** Stigma remains the most significant barrier to accessing mental health resources. Recommendations from the Suicide & Addiction and Member Wellness Program sections call for transparency, confidentiality assurances, and leadership modeling to dismantle fear and shame.

2. **Build Community and Connection.** Isolation is a recurring theme; from solo practitioners to judges in single-judge courts. Initiatives like mentorship programs (Judiciary, Law Student/New Member) and peer support networks (Private Practice, Member Wellness Program) are essential to fostering belonging.

3. **Address Structural Drivers of Stress.** Overwork, unpredictable schedules, and lack of resources are systemic issues. Recommendations for caseload reform (Government & Public Interest, Judiciary) and policy changes (Rules & Regulatory) aim to create sustainable workloads and institutional accountability.

4. **Integrate DEI into Well-Being Strategies.** Underrepresented lawyers face compounded stressors. Equity must be embedded in all well-being initiatives to ensure inclusivity and fairness.

5. **Expand Access to Holistic Resources.** Members want more than crisis intervention—they seek tools for productivity, physical health, and cultural competence. Recommendations for CLEs, physical well-being programs, and resource hubs reflect this broader vision.

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## The Path Forward

Implementing these recommendations will require the WSBA, courts, law schools, employers, and affinity groups. To measure progress and ensure accountability, the WSBA should employ longitudinal surveys and data dashboards. Leadership at every level must champion well-being as integral to professional competence and ethical practice.

Through engagement with these recommendations, Washington can lead the nation in creating a legal profession where well-being is not aspirational— it is foundational.

## Call to Action

Legal professionals, institutions, and employers are urged to:

- **Review and adopt the recommendations relevant to their sphere of influence;**
- **Commit to the Well-Being Pledge and model transparency around mental health; and**
- **Invest in programs that foster connection, equity, and resilience.**

By embracing this shared responsibility, Washington can make significant strides toward a healthier, more sustainable legal profession—one where lawyers and judges thrive, and justice is served with integrity and humanity.

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**AI DISCLOSURE:** *The development of this report was assisted by Co-Pilot and checked for accuracy by the Final Report Writing Work Group of the Member Well-Being Task Force.*

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# Appendices


APPENDIX A: Task Force Charter

APPENDIX B: Summary of Recommendations

APPENDIX C: WSBA Well-Being Survey Report

APPENDIX D: Suicide and Addiction Workgroup Supplemental Survey Results

APPENDIX E: Judiciary Workgroup Supplemental Survey Results

APPENDIX F: Workgroup Literature Reviews and Key Sources

# APPENDIX A
# Task Force Charter

WASHINGTON STATE
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# CHARTER
# Well-Being Task Force

**Adopted: January 12, 2024.**

## Background

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

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

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

## Task Force Objectives

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

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

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

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

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

Workgroups will be tasked with:

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

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

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

**Timeline**

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

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

**Composition**

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

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

Further membership criteria is detailed in the appendix below.

**Nominations and Appointment**

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

**Terms**

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

**Final Report**

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

**APPENDIX**

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

*Practice Types and Venues*

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

*Years of Bar Licensure*

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

*Experience or Interest in Well-Being*

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

*Mental Health Professionals*

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

*Diversity, Equity, and Inclusion*

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

*Geography*

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

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

# APPENDIX B
# Summary of Recommendations

WASHINGTON STATE
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# Appendix B: Summary of Recommendations

This is a summary of more detailed recommendations found in the chapters for each workgroup.

## Confidentiality and Normalizing Help Seeking

- Law schools and WSBA communicating to law students and members, through rules, standards and outreach, that help seeking will be an asset and not an obstacle towards graduation, admittance to the bar, and in one's career as a lawyer.
- Encourage bar leaders, firm leaders and judges to share stories of vulnerability through presentations and articles.
- Creating a communications campaign promoting the confidential features of the Member Wellness Program for lawyers and the Judicial Assistance Services Program for judicial officers. Emphasize the lack of connection of those programs to disciplinary processes.
- Implement a Well-Being Pledge with resourcing from WSBA for firms that commit to promoting flexibility, civility, model policies for mental health leave, and mental health support. Demonstrate these policies at WSBA.

## Building Community and Mentorship Opportunities

- Develop a formal mentorship program for new members with a structured curriculum and CLE credit as well as a similar program for new judges.
- Create community through the creation of peer support groups, yoga classes, allyship initiatives, as well as hosting walking, hiking, biking, or running clubs with events like step challenges/wellness competitions.
- Create small-group coaching and local networking events for solo/small practice attorneys; rural attorneys; historically excluded groups; as well as monthly gatherings for judges in small and/or rural court systems or who are members of historically excluded groups..
- The Member Wellness Program can create coordinated service days with non-profits.
- De-center alcohol in networking and professional events.
- Develop non-12-step and identity-responsive peer options.

## Training and Continuing Legal Education Courses

- Create separate presentations on well-being and resilience for the following populations: law students and new members; government and public interest lawyers; and judges.
- Create CLEs on the following focus topics:
  - Stress, anxiety, depression, substance use, suicidality, mental health first aid, addiction, secondary trauma, compassion fatigue, burnout prevention

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  - Interpersonal effectiveness, perfectionism, task management as mental health management, imposter syndrome, motivation and focus, boundary setting, and empathy
  - Anti-stigma, DEI and Well-Being, career progression cycles, community building.
  - Sleep, diet hygiene, and the advantages of exercise for mental health and productivity.
- Advocate for workplace mental health as a professionalism issue by framing chronic distress and substance use as competence concerns.
- Provide trainings for supervisors to recognize and address burnout in employees.
- Create a Centralized WSBA DEI and Well-Being Resource Hub centralizing resources on DEI, mental health, affinity groups, mentorship, and cultural competency
- Extend Judicial College to two weeks with specific curriculum ideas and incorporating judicial well-being into plenary sessions at conferences.

## Access to Well-Being Resources

- Make culturally competent referral resources (counselors, prescribers, treatment programs, coaches, supportive groups like WaLAL) available to members and law students without a login (PPWG).
- Offer WSBA-sponsored discounts for wellness services like gyms and counseling.
- Create toolkits for lawyers outlining client expectations, timelines, and strategies for managing mental health, trauma and stress.
- Subsidize mental health and addictions care via grants or partnerships.
- Support legislation enabling courts to contract across jurisdictions for specialized proceedings.
- Broaden the Judicial Assistance and Services Program role to include confidential problem-solving and support for new judges.
- Administer member well-being and DEI and Well-Being surveys on a regular 3-5 year basis that tracks trends over time.

## Institutional, Rule, and Policy Changes

- Make annual wellness based CLEs mandatory for members, and wellness based CLEs required for law students.
- Advocate for reforms in court rules to reduce unhealthy filing deadlines and conflicting trial schedules.
- Increase judicial training to enhance professionalism and civility in the courtroom and recommend ways to reduce stress for government and public interest lawyers.
- Reduce Caseloads: WSBA can convene stakeholders—including public defense employers, solo practitioners, and judicial administrators—to emphasize the link between excessive workloads and attorney burnout, suicide, and substance use.
- The Judicial Workgroup recommended specific solutions to address the fatigue associated with warrant duty; ways to enhance the security and safety of judges; consideration for trial judges in the drafting of appellate opinions; and a method for tracking judicial workload statewide. They also promoted enabling courts to contract across jurisdictions for specialized proceedings.
- Integrate wellness considerations into WSBA policy reviews and strategic planning (licensing, ethics, professional responsibility, discipline).
- The Rules and Regulatory Workgroup provided recommendations regarding discipline, conditional admission, and the creation of a State Lawyers Assistance Committee. In addition, recommendations were made for RPCs 1.1 (Competence), 1.3 (Diligence), 1.16, and 8.3.

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# APPENDIX C
# WSBA Well-Being Survey Report

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# WSBA Member Well-Being Survey Report: Preliminary Findings

DRAFT REPORT PREPARED AUGUST 2025

WASHINGTON STATE BAR ASSOCIATION
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WASHINGTON STATE
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# Introduction

This report summarizes key findings from the WSBA Member Well-Being Survey (The Survey), providing an overview of the WSBA Member Well-Being Task Force's (Task Force) analysis and next steps.

The Survey was prepared by the Member Survey Workgroup of the Task Force with support from Professor Matthew S. Thiese from the University of Utah School of Medicine, WSBA staff, and National Business Research Institute (NBRI). The anonymous survey was administered by NBRI from January 28-February 20, 2025. The survey received responses from 903 members (9% response rate), yielding a 99.84% confidence level with a 5% sampling error.

## SEGMENT ANALYSIS METHODOLOGY

The Task Force was able to segment certain practice areas and other demographics and compare the results of those particular segments to the results of survey respondents.

**The segments analyzed were:**

1. Respondents working in medium- and large- size firms.
2. Respondents working in solo and small firms.
3. Respondents working in government and public interest organizations.
4. Respondents designated as new members.
5. Respondents who reported their primary practice area as litigation (civil or criminal).
6. Respondents who reported minimum billing hour requirements of 1751 per year and over.
7. Respondents who reported their license type as Judicial.
8. Respondents who indicated their race/ethnicity as something other than White/European Descent.

The definitions of 1-4 are provided in footnotes as they are first mentioned in this report. These segments are aligned with the workgroups formed by the task force. The workgroups were established to study various segments and demographics of the profession including private practice, government and public interest, law student and new member, judicial, and intersection of diversity, equity and inclusion and well-being.

The results from the segment analysis are being used to draw inferences regarding the different segments based on the differences in response percentages of each segment when compared to the percentages of all respondents. The Task Force does not claim statistical causality or correlation when

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discussing the results of the segment analyses. Further research and analysis of each segment would be necessary to draw those statistical determinations.

## PURPOSE

In November 2023 the Board of Governors (BOG) adopted four strategic priorities for FY24. One of those priorities was to study member well-being and expand and improve resources for, and assistance to, legal professionals and the legal community. In furtherance of this organizational priority, the BOG approved the charter for the Task Force in January 2024.

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

**The Task Force is specifically tasked to:**

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

The Charter calls for the formation of a workgroup to investigate well-being among WSBA members (i.e. Member Survey Workgroup). The Member Survey Workgroup's primary goal was to develop and deploy a member survey. Areas of inquiry for the survey include the relative well-being of members, the identification of challenges in legal practice, the occurrence of mental health conditions or illness, and suggestions for the Task Force.

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# Survey Demographics

## Personal Information

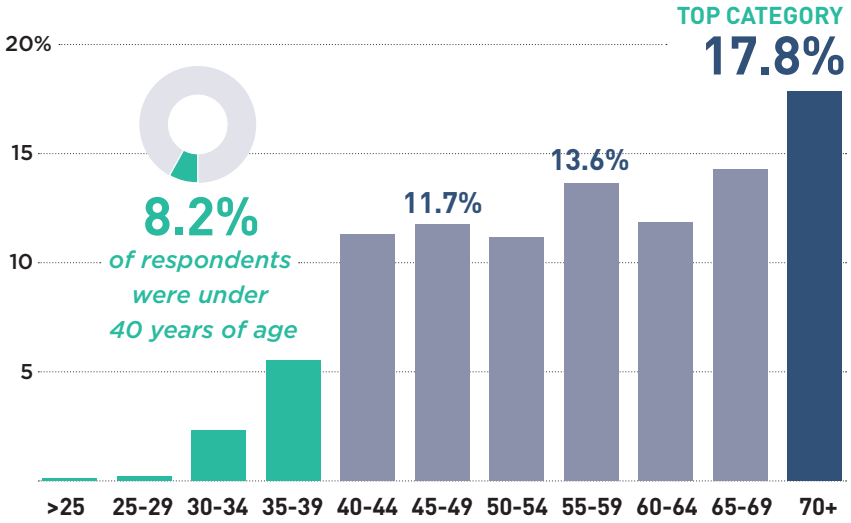
The survey was distributed to 10,000 WSBA members proportionally across all congressional districts. Respondents represented a wide range of age groups, with the majority being 50 or older. Notably, 73% of respondents in private practice were 50 or over, 90% of judiciary respondents were 50 or over, while 58% of those in government and public interest practice were 50 or over.

In terms of gender identity, 51% of respondents identified as male, 43.2% as female, and a small percentage as transgender, non-binary/non-conforming, or preferring not to disclose. There were higher percentages of males in private practice and females in government and public interest practice.

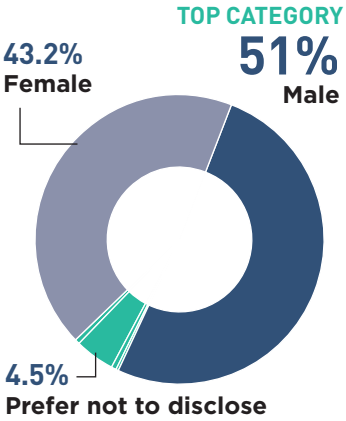
The majority of respondents identified as White/European Descent (82.3%), followed by Asian, Hispanic/Latinx, Multi Racial/Bi-Racial, and Black/African American/African Descent. Government and Public Interest[1] (GPI) respondents had a higher percentage of non-white attorneys.

Most respondents were married or in a committed relationship (77%), and 40.09% indicated they have caregiving responsibilities. The majority identified as heterosexual (81.7%), with smaller percentages identifying as gay, lesbian, bisexual, pansexual, queer, or preferring not to disclose.

**What is your age group?**




**What is your gender?**




*(Other: 0.44%; Non-binary, non-conforming: 0.33%; Transgender: 0.44%)*

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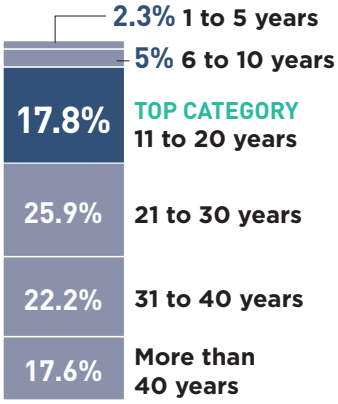
1. Government and Public Interest (GPI) respondents indicated they work for government, public service, or non-profit organizations.

## Practice Location and Experience

Respondents were asked to select their primary practice location from a list of counties, with the majority located in the largest population centers of King, Pierce, Snohomish, Spokane, or Clark counties (56.5%). Most respondents have been practicing law for over 10 years, with a little over half having practiced for 11-30 years. The majority of respondents were licensed as attorneys (97.7%), with a smaller percentage holding licenses as judicial officers. Among those with a judicial license type, the responses varied widely, with some having sat on the bench for only a few years, while others had decades of experience. The majority indicated that they serve in Superior, District, or Municipal Courts (71.4%), with smaller percentages in Appellate Courts, Juvenile Courts, Tribal Courts, Administrative Law Judge positions, or as Magistrate Judges.

**How many years have you been practicing law?**




## Primary Area of Practice and Work Organization

Respondents with an attorney license type were asked to describe their primary area of practice: 33.6% indicated that they work in litigation (civil or criminal), 19.6% in transactional, 16.9% in administrative/government/regulatory, and 8.1% in family law. The remaining percentage designated "other." The majority (60.1%) indicated that they work in private practice (solo or in firms of various sizes). The remainder work in judicial chambers, government/public service/non-profit organizations, in-house corporate roles, law schools, bar administration, or other settings. A little over 79% of respondents in private practice are Solo and Small Firm.[2]

**Which of the following best describes the organization where you work?**

2. Solo and Small Firm (SSF) include respondents who indicated they work in private practice firms with one to five practitioners.

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# Key Survey Findings

The Survey provided the opportunity for WSBA members to report on their well-being, focusing on various aspects such as demographics, practice location, work hours, stress levels, financial concerns, physical and mental health, and the availability and utilization of wellness programs.

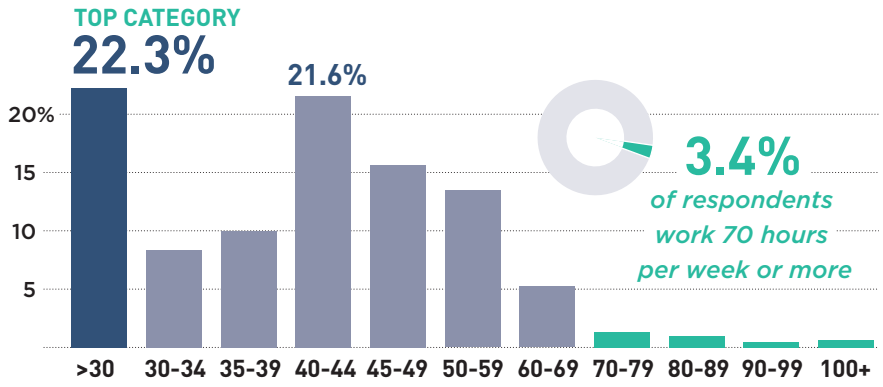
The survey aims to identify key stressors and challenges faced by legal professionals and to highlight areas where improvements can be made to enhance their overall well-being.

**Highlights of the findings include:**

## Total Work Hours (Billable and Nonbillable)

- The majority of respondents reported working between 40 and 59 hours per week (including billable and nonbillable hours).
- Medium and Large Size Firm[3] (MLSF) respondents were much higher in the 50-59 hours worked category and higher in all of the categories 60 hours and above.
- Solo and Small Firm (SSF) respondents were higher in the 30-34 and 35-39 hours worked categories and lower in the 40-79 hours categories.
- New Member[4] respondents reported working more hours than the general population.[5] The percentage of the general population working between 40-44 hours a week was 21.5% whereas new members working 40-44 hours was 27.6%. In addition, almost 7% more of New Members are working 60-69 hours compared to the general population.
- The number of GPI respondents working 40-44 hours per week was 15.79% higher than the general population.

**In the past month, how many hours did you work in an average week? Include billable and non-billable time.**

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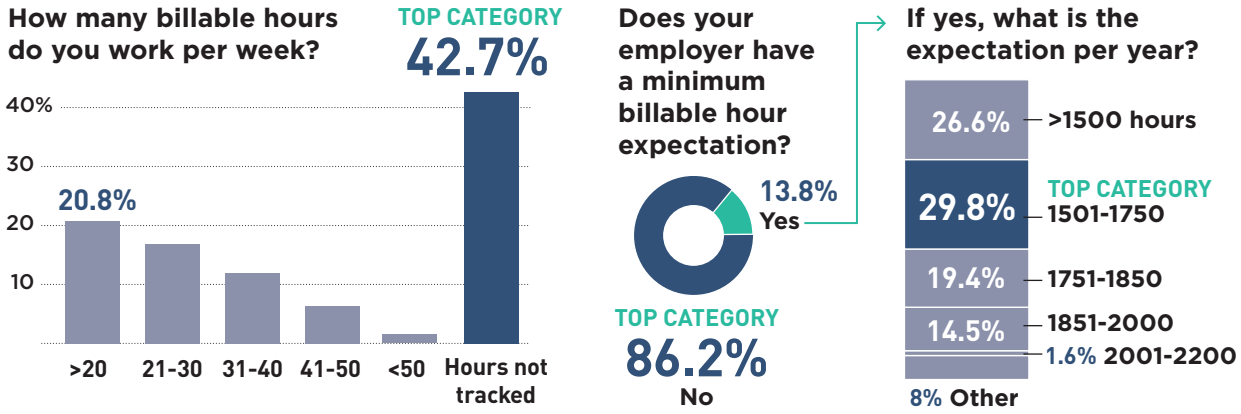
3. Medium and Large Size Firm (MLSF) include respondents who indicated they work in private practice firms with six to more than 75 practitioners.
4. New Member respondents are those who indicated they have been in practice for ten years or less.
5. General population refers to all respondents.

## Billable Hours

- **About 14%** of respondents indicated their employer has a minimum billable hour requirement.
- **52.2%** of MLSF respondents indicated their employer has a minimum billable hour requirement.
- **57.3%** of respondents reported they track billable hours.
- **82.8%** of MLSF respondents track billable hours.
- **74.5%** of SSF respondents track billable hours.
- **74.3%** of MLSF respondents have minimum billable hour requirements between 1501 to 2000 hours per year.
  - > New Members are billing more hours per week compared to the general population. **33.8%** of the New Member group is billing 31 to 50 hours per week compared to **18.2%** of the general population.
- **66.9%** of respondents experience stress due to billable hour expectations occasionally, regularly, or every day/nearly every day.
- **77.1%** of MLSF respondents experience stress due to billable hour expectations either occasionally, regularly, or every day/nearly every day.
- **82.6%** of the New Member group experiences stress due to billable hour expectations occasionally, regularly or every day/nearly every day.




## Employer Expectations

- **36.5%** of respondents indicated that they are expected to be available outside of work hours regularly or always and **45.5%** said they are expected to be available occasionally.
- **40.3%** of MLSF respondents indicated that they are expected to be available outside of work hours regularly or always and **48.5%** said they are expected to be available occasionally.
- **40.3%** of SSF respondents indicated that they are expected to be available outside of work hours regularly or always and **43.8%** said they are expected to be available occasionally.
- **36.9%** of New Member respondents indicated that they are expected to be available outside of work hours regularly or always and **53.6%** said they are expected to be available occasionally.

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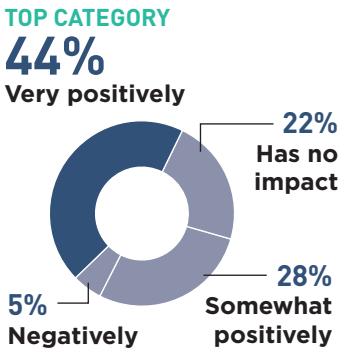
## Remote Work

- **45%** of respondents indicated they can work remotely full-time.
- **44%** of respondents indicated they can work remotely part-time or on certain days.
- **11%** of respondents indicated they cannot work remotely.

**When asked how their ability (or inability) to work remotely affects their well-being respondents answered as follows:**

> 44% said it affects their well-being very positively.
> 22% said it affects their well-being somewhat positively.
> 28% indicated it has no impact on their well-being.
> 5% indicated it impacts their well-being somewhat or very negatively.

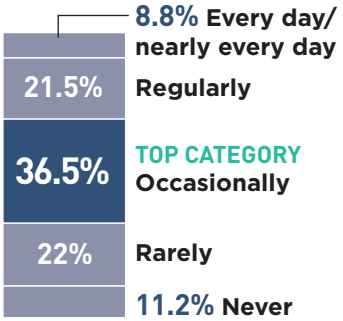
**How does working remotely affect your well-being?**



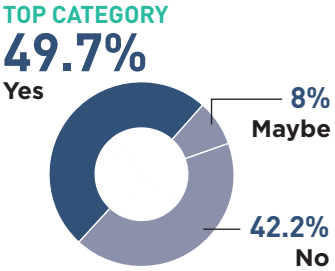

## Burnout and Leaving the Profession

- **58%** of respondents reported feeling burned out from their work regularly or occasionally.
- **8.8%** of respondents reported feeling burned out from their work every day/nearly every day.
- **64.2%** of MLSF respondents reported feeling burned out from their work regularly or occasionally.
- **60.5%** of GPI respondents reported feeling burned out from their work regularly or occasionally.
- **80%** of New Member respondents reported feeling burned out from their work regularly or occasionally.
- **57.4%** of SSF respondents reported feeling burned out from their work regularly or occasionally.
- **49.7%** of respondents reported they have considered leaving the profession due to stress, burnout, or mental health issues.
  > SSF and MLSF respondents considered leaving due to stress, burnout, or mental health issues at slightly lower rates compared to the general population.
- **58.4%** of GPI respondents reported they have considered leaving the profession due to stress, burnout, or mental health issues.
- **53.7%** of respondents reporting their primary practice area as litigation (civil or criminal) have considered leaving the profession due to stress, burnout, or mental health issues.

**How often do you feel burned out from work?**




**Have you ever considered leaving the legal profession due to stress or burnout?**

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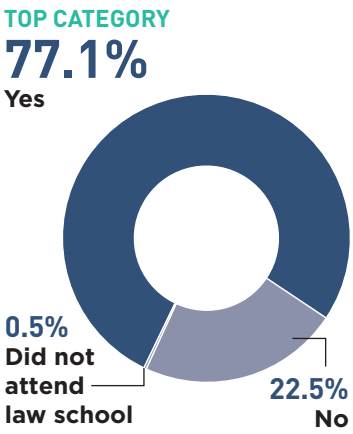
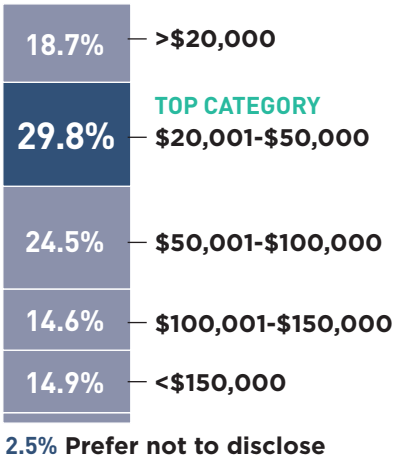
## Student Loan Debt and Financial Stressors

- **77.1%** of respondents indicated that they graduated law school with student loan debt.
  - > 29.6% of respondents had over $100k in student loan debt, 24.5% had $50 to $100k, and 24.8% had $20k to $50k.
  - > New Member respondents reported their law school debt is comparatively larger. 46.1% of New Member group respondents are graduating with more than $150,000 compared to 14.9% of the general population.
- **52.8%** of respondents with student loan debt reported that it has somewhat or significantly negatively affected their mental wellbeing.
- **60.4%** of GPI respondents with student loan debt reported that it has somewhat or significantly negatively affected their mental wellbeing.
- **86.5%** of New Member respondents with student loan debt reported that it has somewhat or significantly negatively affected their mental wellbeing.
- **52.6%** of all respondents are stressed by their financial situation occasionally, regularly, or every day/nearly every day.
- **26.5%** of all respondents have wanted to make a career change but didn't because of student loan debt.
- **40.4%** of New Member respondents have wanted to make a career change but didn't because of student loan debt.
- **35.2%** of GPI respondents have wanted to make a career change but didn't because of student loan debt.

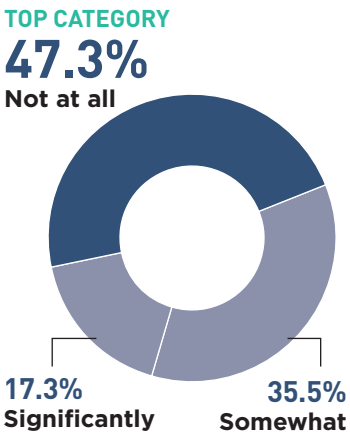
**Did you graduate law school with student loan debt?**




**How much debt did you have upon graduation?**




**To what extent has the debt negatively affected your well-being?**

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## Physical Activity and Sleeping Habits

- **53.6%** of respondents are engaged in at least 20 minutes of physical activity for 4-7 days per week.
- **64.2%** of all respondents reported getting about 6 to 7 hours of sleep on an average night and 20% reported getting 8 hours of sleep at night.
- **11.4%** of all respondents get 4 or 5 hours of sleep per night.
- **74.2%** of all respondents reported waking up feeling rested and restored sometimes, regularly, or always.
- **25.8%** of all respondents reported they wake up feeling restored and rested rarely or never.
- **68.8%** of GPI respondents reported waking up feeling rested and restored sometimes, regularly, or always.
- **30.2%** of GPI respondents reported waking up feeling rested and restored rarely or never.

## Depression and Anxiety

- **15.7%** of all respondents reported feeling sad, depressed, or hopeless in the past month regularly or every day/nearly every day and 27.1% reported feeling the same occasionally.
  - > Higher rates among New Member (23.4%) and GPI (20.6%) respondents.
- **56.8%** of all respondents reported feeling nervous, on edge, worried, or panic in the past month occasionally, regularly, or every day/nearly every day.
  - > Higher rates among New Members (84.4%), civil/criminal litigators (63.2%), and GPI (68.8%) respondents.
- **57.2%** of Judicial respondents reported feeling nervous, on edge, worried, or panic in the past month occasionally, regularly, or every day/nearly every day.

## Suicidal Thoughts and Actions

- **9.9%** of respondents choosing to answer the question (739 respondents) indicated they have had suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm in the past 12 months.
  - > Among those who reported having suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm, the 83.6% indicated that their work environment somewhat or significantly contributed to these thoughts or actions.
- **13.3%** of MLSF respondents indicated they have had suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm in the past 12 months and 86.7% of those who reported having suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm, indicated that their work environment somewhat or significantly contributed to these thoughts or actions.
- **9.5%** of SSF respondents indicated they have had suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm in the past 12 months and 81.3% of those who reported having suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm, indicated that their work environment somewhat or significantly contributed to these thoughts or actions.
- **16%** of New Member respondents indicated they have had suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm in the past 12 months and 100% of those who reported having suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm, indicated that their work environment somewhat or significantly contributed to these thoughts or actions.

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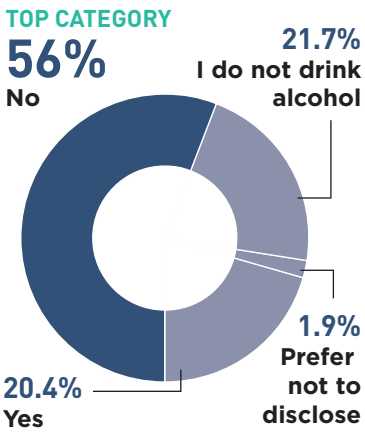
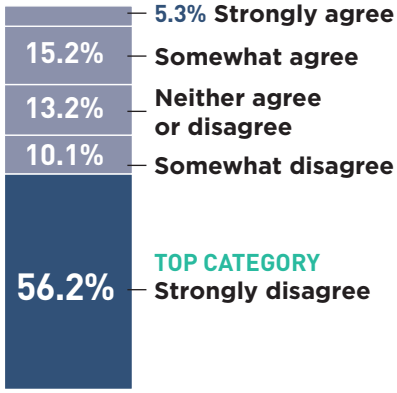
## Alcohol and Drug Use

- **20.4%** of all respondents indicated that they feel concerned about how much or how often they drink alcohol. Results were similar for SSF, New Member, and GPI respondents.
- **26.9%** of MLSF respondents indicated that they feel concerned about how much or how often they drink alcohol.
- **13.4%** of all respondents indicated that they have used drugs other than those prescribed for a current medical condition in the past 12 months.
  - > Among those who reported recreational drug use, 20.83% indicated that they feel concerned about how much or how often they use drugs.
- **20.4%** of all respondents somewhat agreed or strongly agreed with the statement that the stress of their job and/or the culture at their workplace cause them to drink alcohol or use recreational drugs more than they otherwise would.
- **28.1%** of New Member respondents somewhat agreed or strongly agreed with the statement that the stress of their job and/or the culture at their workplace cause them to drink alcohol or use recreational drugs more than they otherwise would.
- **19.7%** of GPI respondents somewhat agreed or strongly agreed with the statement that the stress of their job and/or the culture at their workplace cause them to drink alcohol or use recreational drugs more than they otherwise would.
- **24.1%** of MLSF respondents somewhat agreed or strongly agreed with the statement that the stress of their job and/or the culture at their workplace cause them to drink alcohol or use recreational drugs more than they otherwise would.
- **69.7%** of all respondents indicated that their workplace social events include alcohol some of the time, often, or always. Only 30.31% reported that their workplace events never include alcohol.

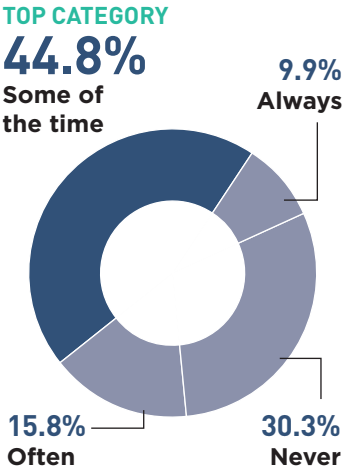
**Do you ever feel concerned about how much or how often you drink alcohol?**




**The stress of my job and/or the culture at my workplace cause me to drink alcohol or use recreational drugs more than I otherwise would:**




**My workplace social events include alcohol:**

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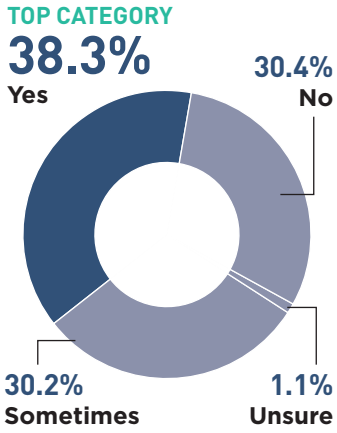
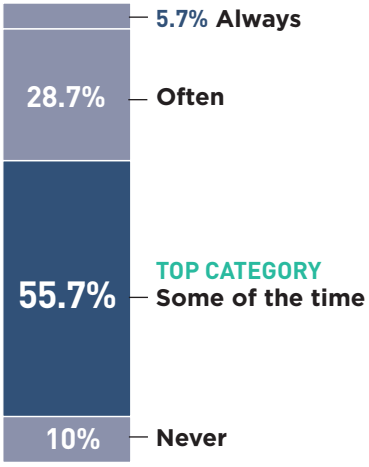
## Exposure to Distressing Material, Experiences, or Trauma

- **38.3%** of respondents are exposed to distressing material, experiences, or trauma related to clients or others they encounter in doing their job.
  - > Another 30.2% indicated they are *sometimes* exposed to distressing material, experiences, or trauma related to clients or others they encounter in doing their job.
  - > 90% of all respondents reported they find themselves thinking about work-related distressing material, experiences, or trauma outside of work some of the time, often, or always.
- **43.9%** of SSF respondents are exposed to distressing material, experiences, or trauma related to clients or others they encounter in doing their job.
- **49.5%** of GPI respondents are exposed to distressing material, experiences, or trauma related to clients or others they encounter in doing their job.
  - > 90.7% of GPI respondents reported they find themselves thinking about work-related distressing material, experiences, or trauma outside of work some of the time, often, or always.
- **20.3%** of all respondents reported that exposure to distressing material, experiences, or trauma from work has a significant impact on their mental health or well-being.
- **27.8%** of GPI respondents reported that exposure to distressing material, experiences, or trauma from work has a significant impact on their mental health or well-being.

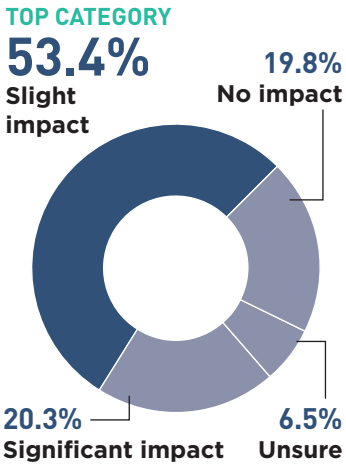
**Are you exposed to distressing material, experiences, or trauma related to your clients or others you encounter in doing your job?**




**How often do you find yourself thinking about work-related distressing material, experiences, or trauma outside of work?**




**How much of an impact does this traumatic exposure from work have on your mental health or well-being?**

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## Workplace Wellness Programs

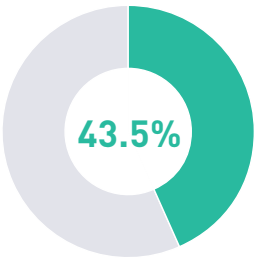
- **40.2%** of respondents indicated that their employer offers wellness programs or resources.
- **51.4%** of respondents indicated that they have utilized wellness programs offered by their employer.
  - > Respondents reported that their employers offer various wellness resources, including educational content on well-being, memberships or subscriptions to wellness resources or apps, direct financial support for well-being activities, flexible options for mental health leave, access to or referrals for external wellness resources, and whole office mental health opportunities.
  - > Among those who have not utilized wellness programs, the primary reasons included they haven't needed them, not having time to utilize the services, and they utilize services not offered by their employer. Other reasons included stigma or reputational/confidentiality concerns, fear it will affect their path to promotion, and doubt that these offerings will make a difference.
- **79.9%** of SSF respondents reported they do not have access to employer wellness programs and resources.

## WSBA Wellness Resources

- **43.5%** of respondents have utilized some WSBA wellness resources.
- **46.4%** of SSF respondents have utilized some WSBA wellness resources.

**The top four WSBA wellness resources utilized by all respondents were:**

- > CLEs on well-being related topics
- > Mental health consultations/brief therapy
- > Peer advising
- > Referrals for services.




*Have utilized some WSBA wellness resources*

**The top four reasons respondents don't use WSBA wellness resources were:**

- > Haven't needed the resources
- > Unaware of the resources
- > Utilize other resources not provided by WSBA
- > Doubt the offerings will make a difference and no time to utilize the resources were essentially tied for 4th.

## Rule, Court, or Institutional Changes

- Respondents were asked to consider various possible rules, court, or institutional changes and their potential impact on well-being. The majority indicated that changes such as making court filing deadlines earlier than midnight, standardizing court rules/preferences across counties, and consistent consequences for abusive/demeaning tactics within hearings would somewhat or significantly improve their well-being.

The Washington State Bar Association Member Well-Being Survey Descriptive Statistics provides a full breakdown of the data, including visuals, demographic trends, and quantitative insights.

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# Analysis and Key Takeaways

Building on the survey findings, the WSBA Member Well-Being Task Force has conducted an initial analysis, highlighting the unique challenges and stressors faced by the legal profession overall and various segments within the legal profession.

## All Respondents

The Survey results demonstrate that legal professionals in Washington struggle to maintain work life balance. Respondents reported working long hours to meet client demands, billable hour requirements, and complete nonbillable hour duties.

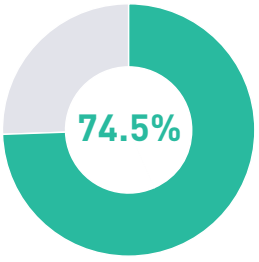
The rates of burnout, depression, and anxiety reported among legal professionals is concerning and the Task Force is using the information gained from the survey to assess how the legal profession in Washington compares to the general population and other highly educated professionals.

The Task Force has similar concerns around alcohol and drug usage among Washington legal professionals. Moreover, the rates of suicidal thoughts and actions within the profession raise serious questions about the stresses and challenges associated with the legal profession, particularly when the suicidal thoughts and actions are tied closely to work environment.

The Task Force will use the results from the survey to further target its study and research of well-being among the legal profession in Washington and to ground the recommendations in our final report.

## Solo and Small Firm (SSF) Respondents

Solo and Small Firm respondents reported working fewer hours compared to the general population of lawyers. They were higher in the 30-34 and 35-39 hours worked categories and lower in the 40-79 hours categories. This indicates that SSF respondents may have more flexibility in their work schedules.




*Track billable hours*

Only 8.13% of SSF respondents reported having a billable hour requirement. However, **74.5%** of SSF respondents track billable hours, which is higher than the general population.

When considering burnout rates, 57.4% of SSF respondents reported feeling burned out from their work regularly or occasionally, which is slightly lower than the general population.

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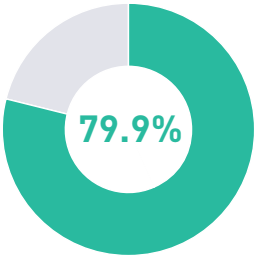
However, 9.5% of SSF respondents indicated they have had suicidal thoughts or actions in the past 12 months, and 81.3% of those reported that their work environment contributed to these thoughts or actions. This highlights the need for better mental health support for SSF respondents.

Moreover, **79.9%** of SSF respondents reported they do not have access to employer wellness programs and resources, underscoring the importance of WSBA wellness resources to this segment of the legal profession. Of concern is that the 2nd top reason that SSF respondents do not utilize WSBA resource is because they are unaware of them. WSBA will need to focus on raising awareness of its resources among members.




*Do not have access to employer wellness programs*

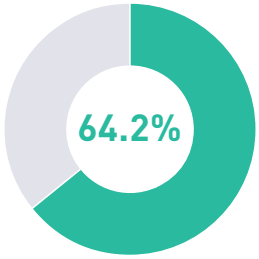
## Medium and Large Size Firm (MLSF) Respondents

Medium and Large Size Firm respondents reported working more hours compared to the general population. They were much higher in the 50-59 hours worked category and higher in all of the categories 60 hours and above.

Additionally, 52.2% of MLSF respondents indicated their employer has a minimum billable hour requirement, and 82.8% of MLSF respondents track billable hour. 77.2% of MLSF respondents experience stress due to billable hour expectations either occasionally, regularly, or every day/nearly every day which is significantly higher compared to the general population. This suggests that MLSF respondents face increased pressure associated with work requirements.

In terms of stress and burnout, **64.2%** of MLSF respondents reported feeling burned out from their work regularly or occasionally, which is higher than the general population.

Furthermore, 13.3% of MLSF respondents indicated they have had suicidal thoughts or actions in the past 12 months, and 86.7% of those reported that their work environment contributed to these thoughts or actions. This underscores the need for better opportunities for work-life balance along with expanded mental health and wellness programs for MLSF respondents.




*Feel burned out from their work regularly or occasionally*

## Government and Public Interest (GPI) Respondents

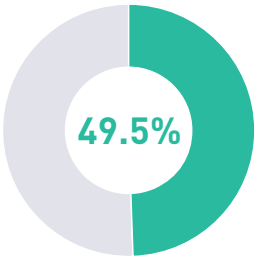
Government and Public Interest respondents reported working more hours in the 40-44 hours per week category compared to the general population.

Additionally, 60.5% of GPI respondents reported feeling burned out from their work regularly or

CONTINUED >

occasionally, which is slightly higher than the general population. GPI respondents also experience depression and anxiety at higher rates when compared to the general population.

**49.5%** of GPI respondents are exposed to distressing material, experiences, or trauma related to clients or others they encounter in doing their job which is higher compared to the general population. 27.8% of GPI respondents reported that exposure to distressing material, experiences, or trauma from work has a significant impact on their mental health or well-being which is higher compared to the general population. This indicates that GPI respondents may face unique stressors and challenges in their work environment that require targeted resources.

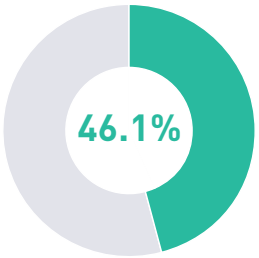



*Are exposed to distressing material, experiences, or trauma at work*

When it comes to financial stressors, 60.4% of GPI respondents with student loan debt reported that it has somewhat or significantly negatively affected their mental wellbeing. Additionally, 35.2% of GPI respondents wanted to make a career change but didn't because of student loan debt. This highlights the financial pressures faced by GPI respondents and the need for better financial support and resources.

## New Member Respondents

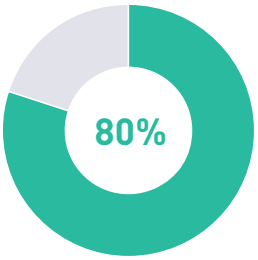
New Member respondents reported their law school debt is larger compared to the general population and a higher percentage of New Member respondents have wanted to make a career change but didn't because of student loan debt.




*New members graduated law school with more than $150,000 in debt (GP is 14.9%).*

New Member respondents reported working more hours compared to the general population. The percentage of New Members working 40-44 hours was 27.6%, compared to 21.5% of the general population. Additionally, almost 7% more of New Members are working 60-69 hours compared to the general population. This suggests that New Members may face higher work demands and expectations.

In terms of stress and burnout, **80%** of New Member respondents reported feeling burned out from their work regularly or occasionally, which is significantly higher than the general population. New Member respondents also experience depression and anxiety at higher rates when compared to the general population.




*Feel burned out from their work regularly or occasionally*

Furthermore, 16% of New Member respondents indicated they have had suicidal thoughts or actions in the past 12 months, and 100% of those reported that their work environment contributed to these thoughts or actions. This underscores the need for better mental health and targeted wellness programs for New Member respondents.

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# 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 formulate the best possible 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.

**AI Disclosure:** *Some material in this publication was generated using CoPilot and was reviewed for accuracy by the Survey Workgroup of the Member Well-Being Task Force.*

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# APPENDIX D

# Suicide and Addiction Workgroup Supplemental Survey Results

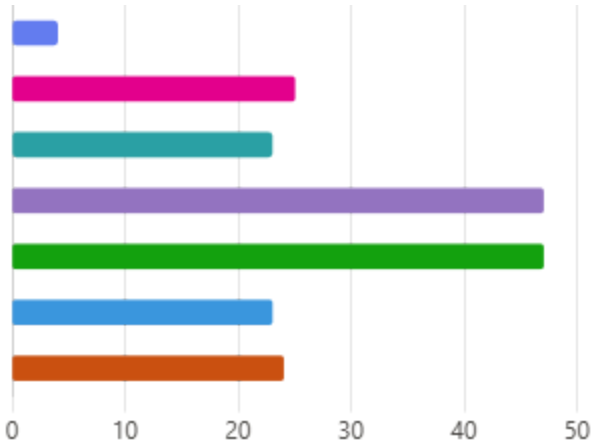
## Responses Overview

Active

| Responses | Average Time | Duration |
|---|---|---|
| 195 | 19:31 | 52 Days |

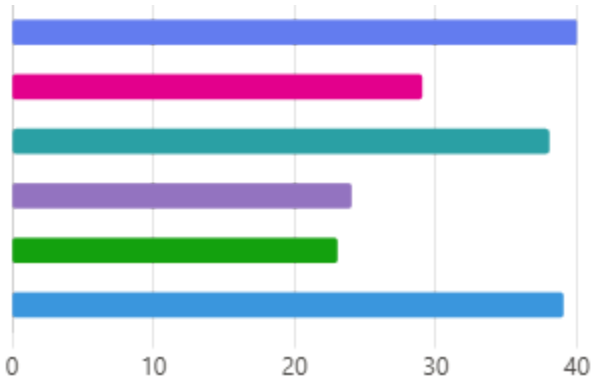
1. How long have you been in legal practice?

| | |
|---|---|
| Less than 1 year | 4 |
| 1 to 5 years | 25 |
| 6-10 years | 23 |
| 11-20 years | 47 |
| 21-30 years | 47 |
| 31-40 years | 23 |
| More than 40 years | 24 |

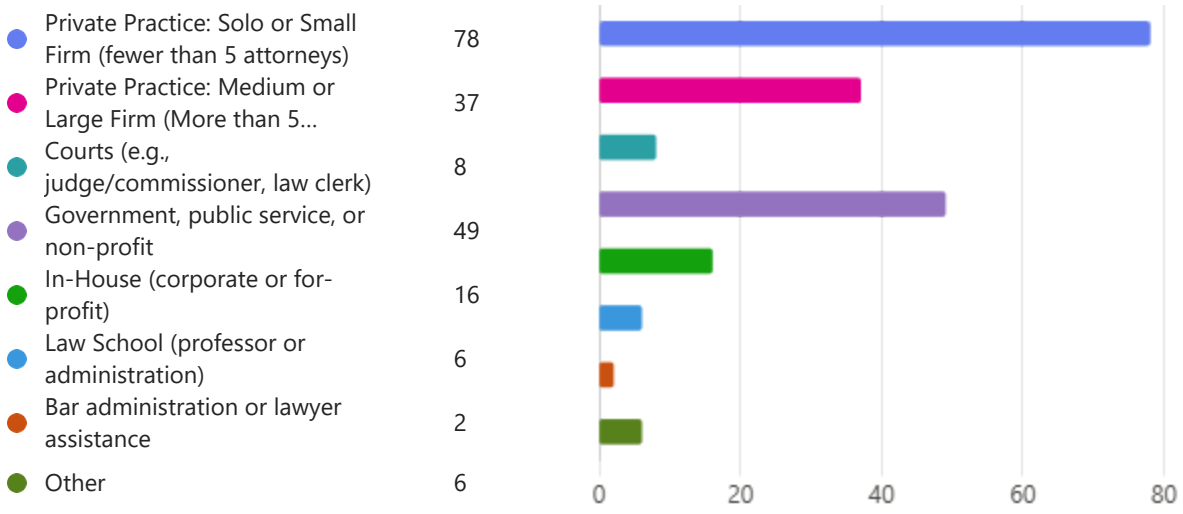



2. In general terms, please describe the type(s) of law your practice.

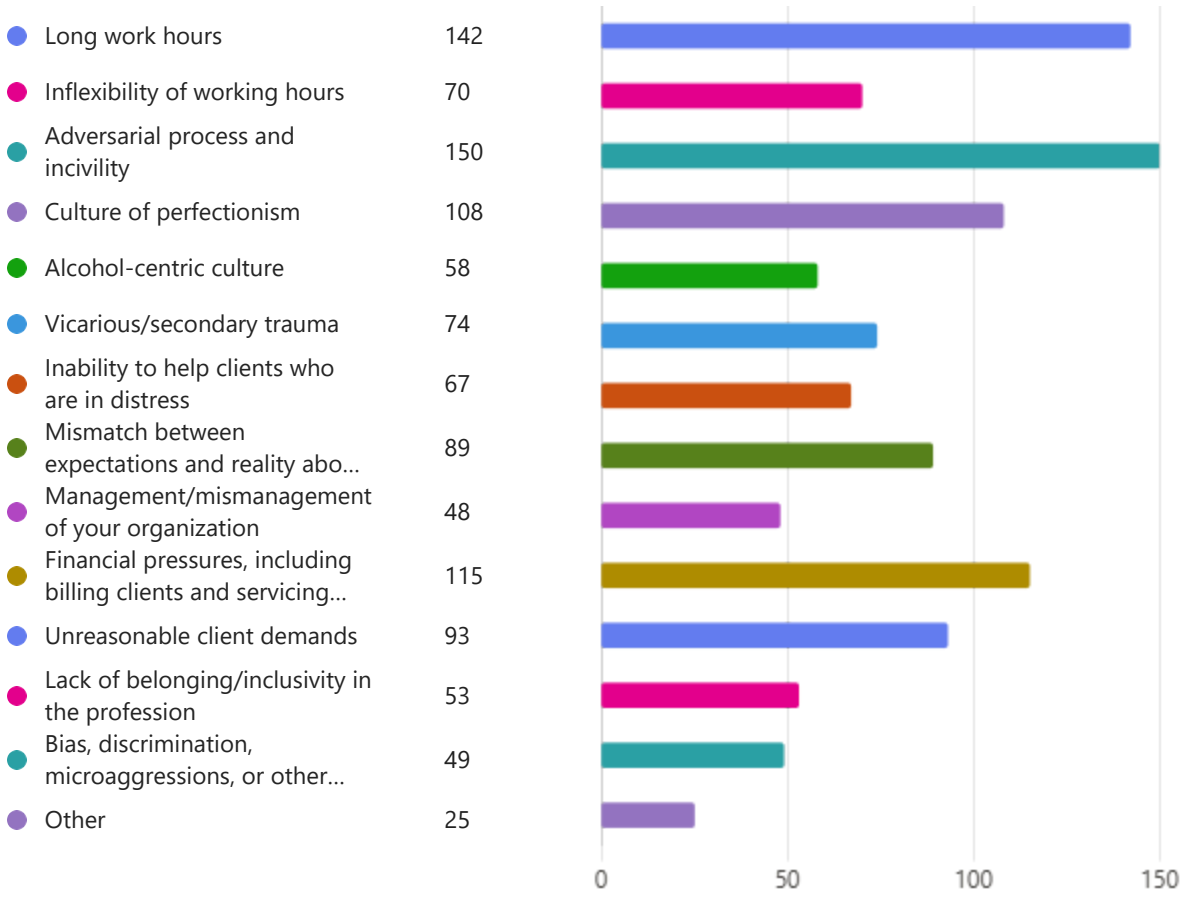
| | |
|---|---|
| Litigation (civil) | 40 |
| Litigation (criminal) | 29 |
| Transactional (e.g., business, real property, contracts) | 38 |
| Family Law | 24 |
| Administrative, Government or Regulatory | 23 |
| Other | 39 |



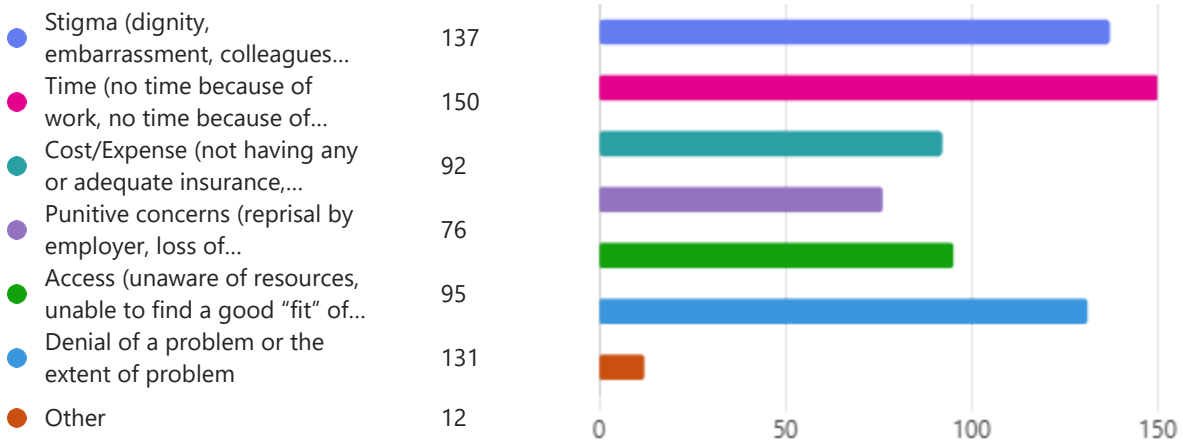
3. Which of the following best describes the organization where you work?




4. Thinking about yourself or other attorneys you know, what features of the legal profession do you believe contribute to mental health or substance use challenges? Select all that apply.

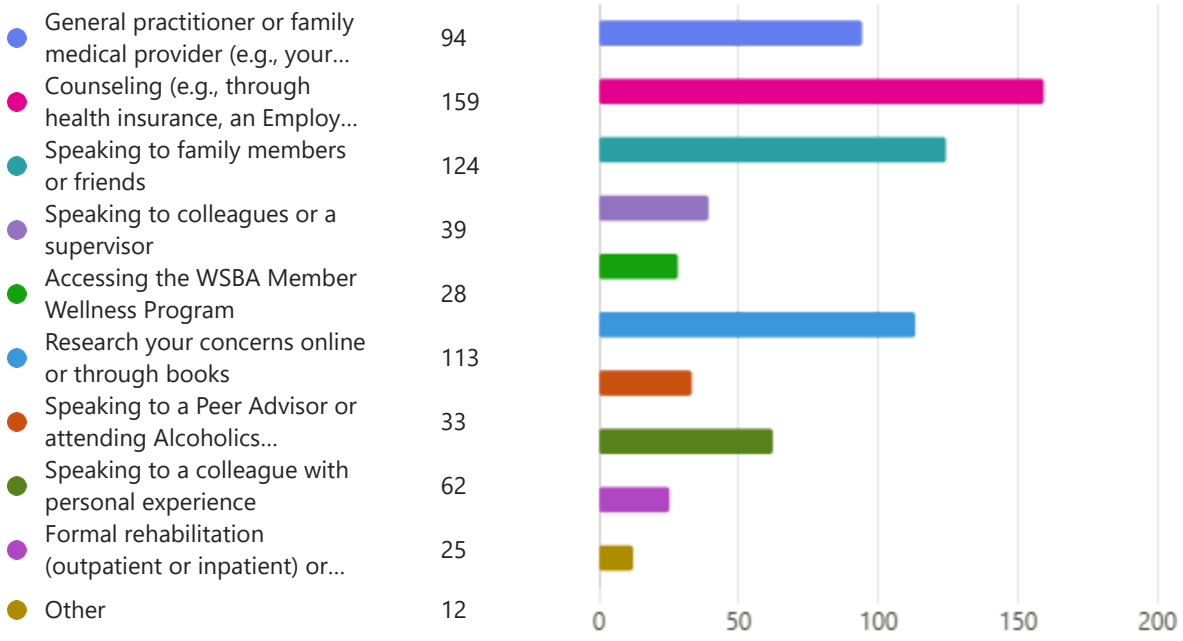


5. Thinking about yourself or other attorneys you know, which of the following may be reasons why an attorney may not seek care for mental health concerns or substance use? Select all that apply.




6. For the following questions, please imagine that you were facing a mental health or substance abuse issue yourself.

   What resources do you believe you would realistically use to get help? Select all that apply.



7. Looking at the resources in the previous question, which options do you believe you definitely would not feel comfortable using? Why not?

149
Responses

Latest Responses

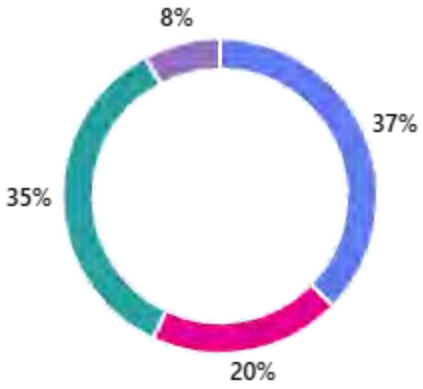
"N/A I'm obnoxiously proactive"

"Speaking with a colleague--the stigma. Keeping your dirty l... "

• • •

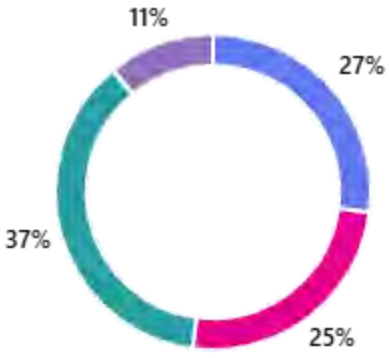
8. If I were experiencing a substance use or mental health issue, I would feel comfortable taking sick lea ve and/or a medical leave of absence from work.

| | |
|---|---|
| Disagree, | 72 |
| Neither agree nor disagree | 38 |
| Agree | 68 |
| Other | 15 |



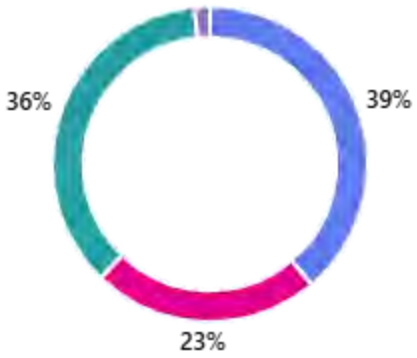

9. At my current employer, I could take leave to address a substance use or mental health issue without suffering negative workplace consequences, such as exclusion from advancement opportunities, dem otion or dismissal, or social exclusion.

| | |
|---|---|
| Disagree | 52 |
| Neither agree nor disagree | 48 |
| Agree | 71 |
| Other | 21 |



10. If I were experiencing a substance use or mental health issue, I would feel comfortable seeking peer support (either formally through a peer counseling program, or informally through colleagues).

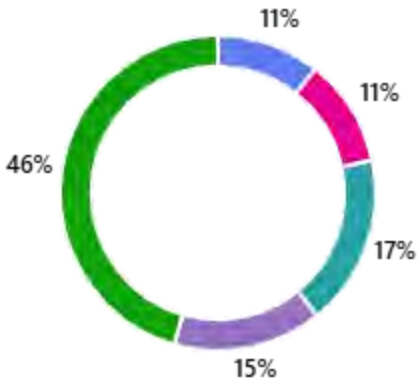
| | |
|---|---|
| Disagree | 75 |
| Neither agree nor disagree | 45 |
| Agree | 70 |
| Other | 3 |




11. The following questions ask about self-harm and suicide.

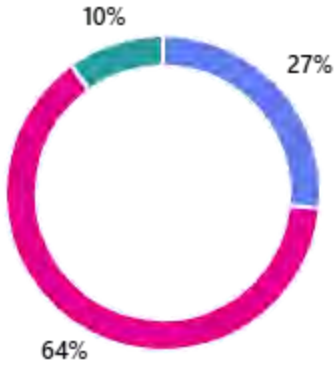
In the event that you had thoughts of self harm or suicide, are there people in your life who you trus t and who you feel you could reach out to for support? If so, how many?

| | |
|---|---|
| None | 20 |
| 1 | 21 |
| 2 | 33 |
| 3 | 29 |
| More than 3 | 86 |



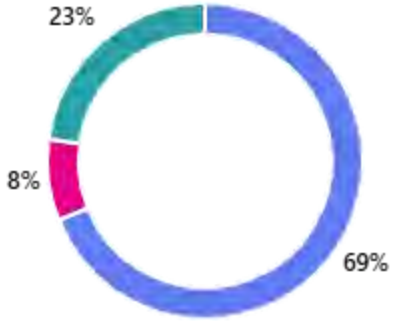
12. To what extent do you agree with the following statement: I am confident that I would know what to do to help someone who has told me they intend to or have made plans to kill themself.

| | |
|---|---|
| I feel confident that I know what to do. | 51 |
| I have ideas about how to help but am not confident. | 122 |
| I have no confidence in how to handle this situation. | 19 |




13. “Mental health first aid” is a term describing training and resources that teach you how to identify, u nderstand, and respond to mental health challenges in other people. If a training on mental health fi rst aid were made available, would you be interested in taking it?

| | |
|---|---|
| Yes | 133 |
| No | 16 |
| Unsure | 44 |




14. Are there additional thoughts you would like to share about the culture of drinking; challenges findi ng help; or the struggles attorneys have with their mental health?

84

Responses

Latest Responses

"This shit's not for the weak."

• • •

# APPENDIX E

# Judiciary Workgroup Supplemental Survey Results

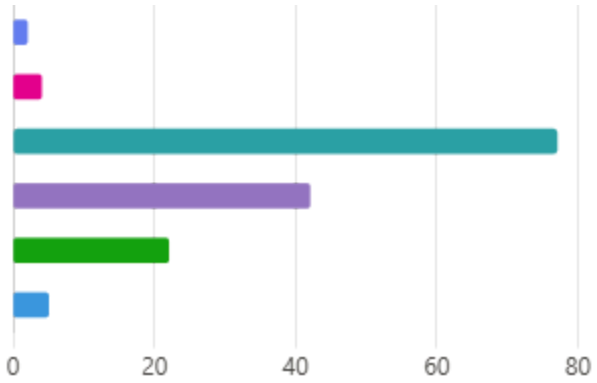
## Responses Overview

Closed

| Responses | Average Time | Duration |
|---|---|---|
| 156 | 22:52 | 92 Days |

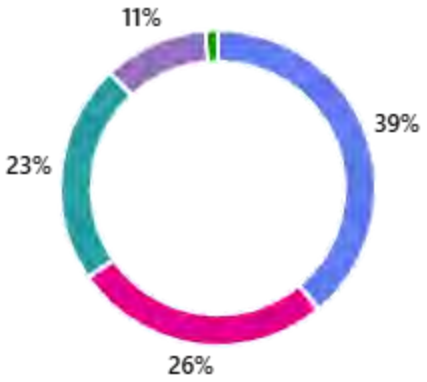
1. What court do you serve on? Check all that apply.

| | |
|---|---|
| Supreme Court | 2 |
| Court of Appeals | 4 |
| Superior Court | 77 |
| District Court | 42 |
| Municipal Court | 22 |
| Tribal Court | 5 |



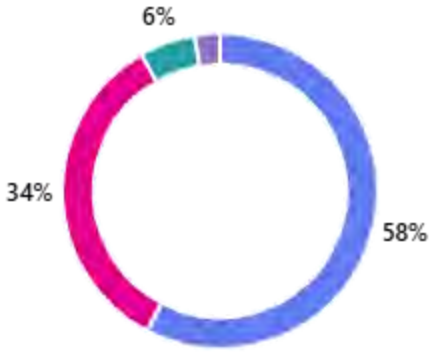

2. How long have you been on the bench? Check all that apply.

| | |
|---|---|
| 0-5 years | 62 |
| 6-10 years | 42 |
| 11-20 years | 36 |
| More than 20 years | 17 |
| Retired | 2 |



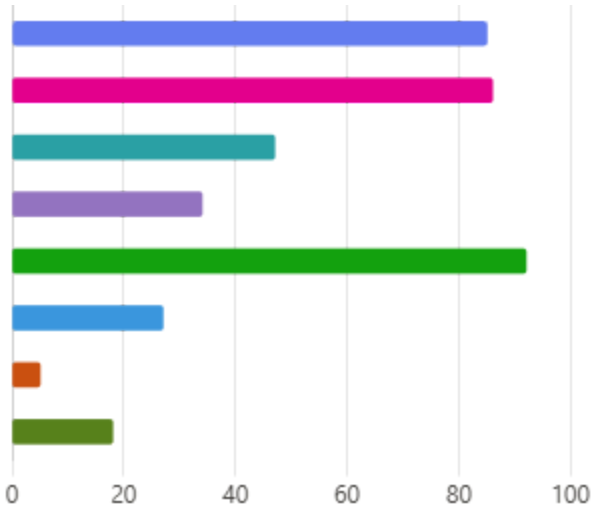
3. How satisfied do you feel about your career choice to become a judge?

| | |
|---|---|
| Very satisfied | 90 |
| Mostly satisfied | 53 |
| Neutral | 9 |
| Somewhat dissatisfied | 4 |
| Dissatisfied | 0 |

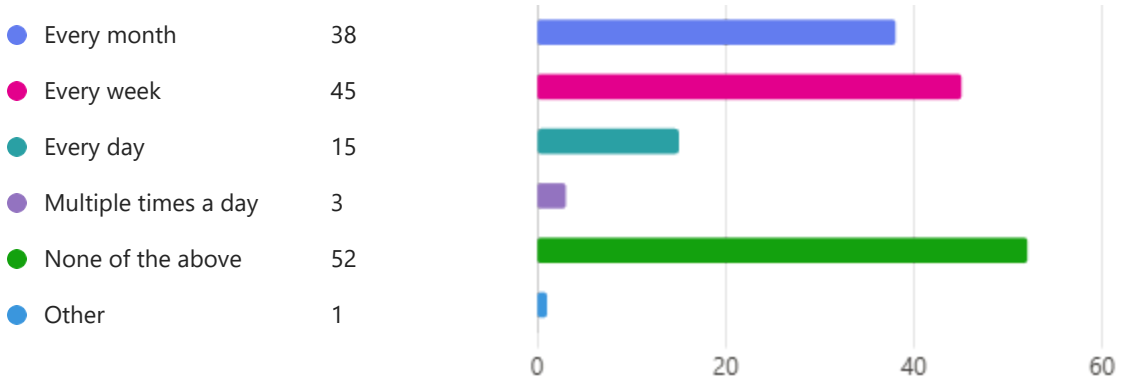



4. Which of the following challenges have you experienced as a result of your position on the bench? C heck all that apply.

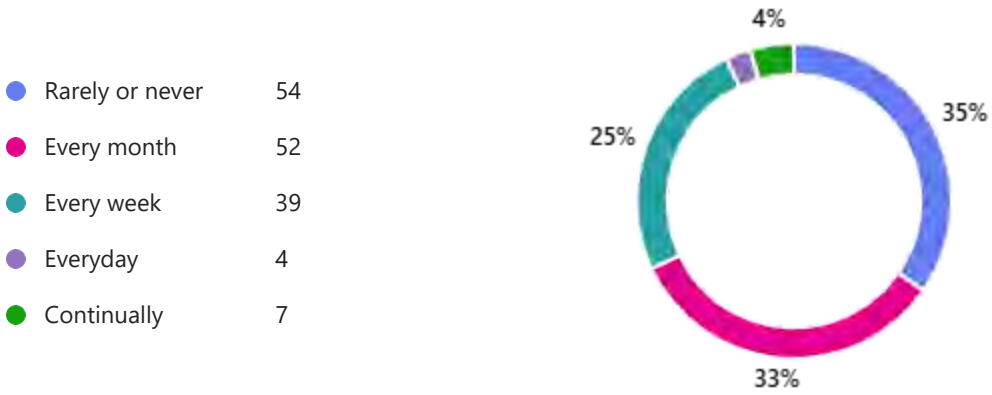
| | |
|---|---|
| Compassion fatigue regarding the stories that you have heard. | 85 |
| Intrusive thoughts about the decisions you have made that... | 86 |
| Disorganization or difficulty managing your workload. | 47 |
| Struggles with high anxiety and/or panic. | 34 |
| Reduced sleep | 92 |
| Depression | 27 |
| Suicidal Ideation | 5 |
| Increased Substance Use | 18 |



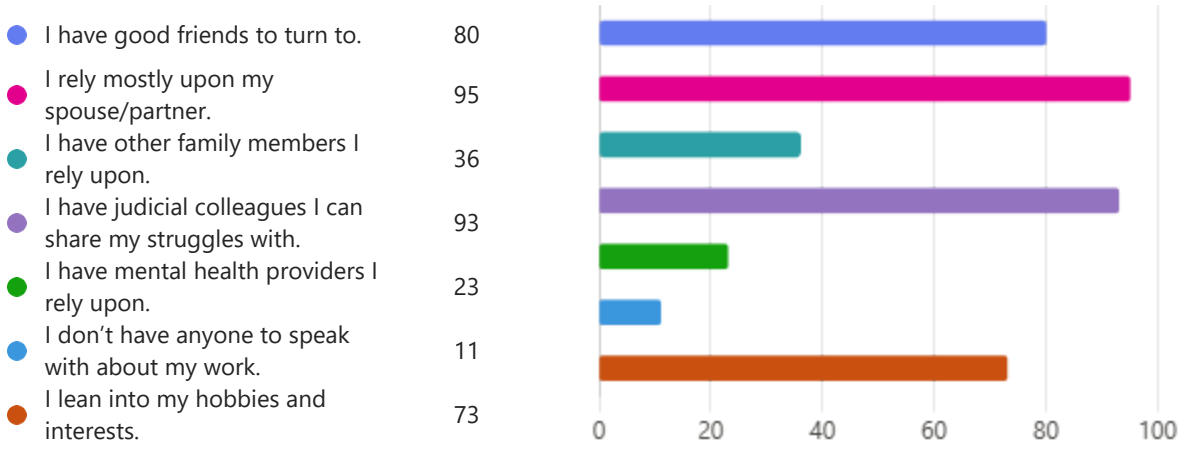
5. To what extent do challenges in concentration impact your work?



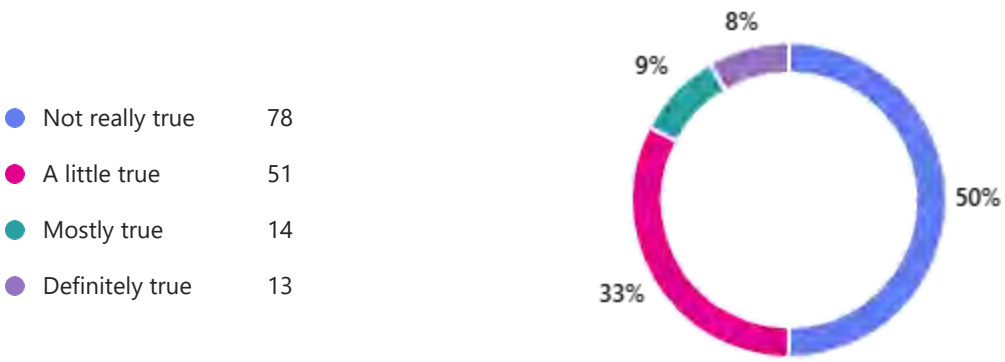

6. To what extent do you agonize over judicial decisions that you are going to make or have made.



7. When overwhelmed by work do you have people to turn to in order to relieve this stress? Check all t hat apply:

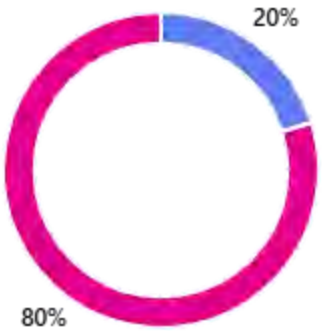



8. I feel like I spend too much time trying to be what a judge is supposed to be rather than being mysel f.



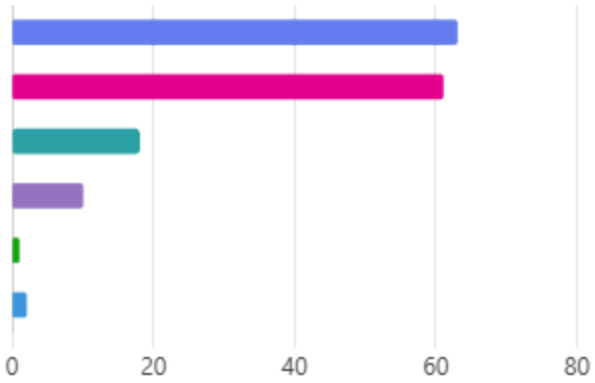
9. We are allowed to utilize sick leave for mental health reasons.  Is this something you utilize?

| | |
|---|---|
| Yes | 31 |
| No | 123 |

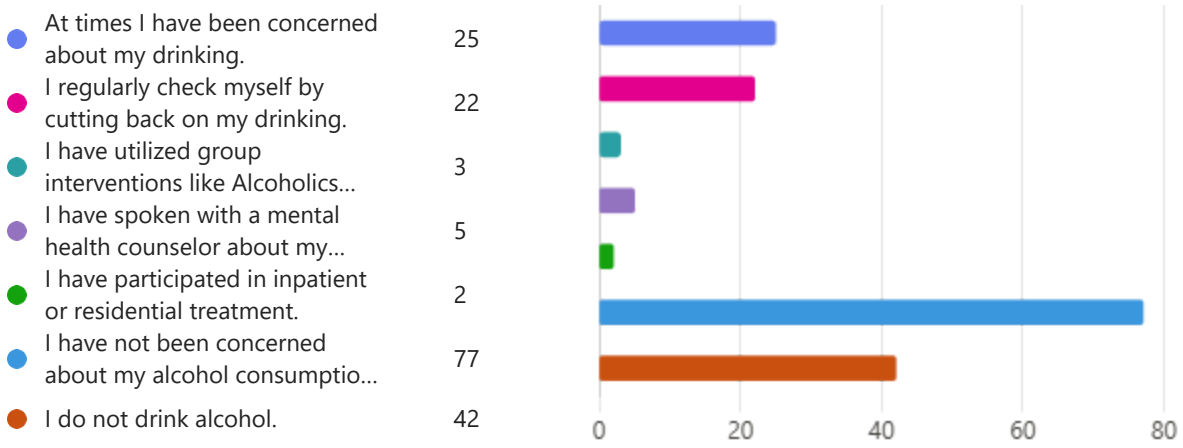



10. How many alcoholic beverages have you had in the last week?

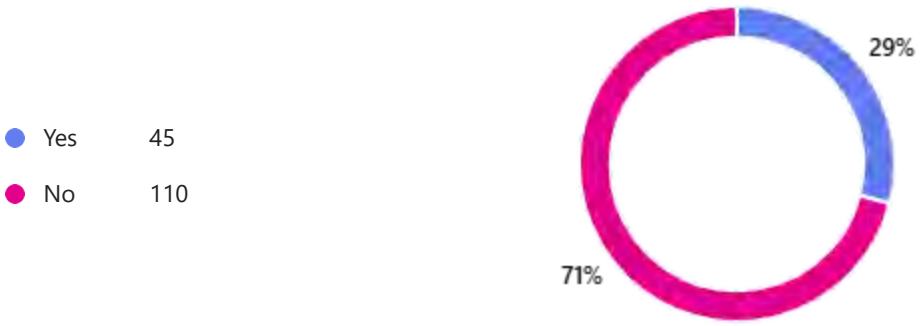
| | |
|---|---|
| None | 63 |
| 1-4 | 61 |
| 5-9 | 18 |
| 10-15 | 10 |
| 16-25 | 1 |
| 26 or more | 2 |



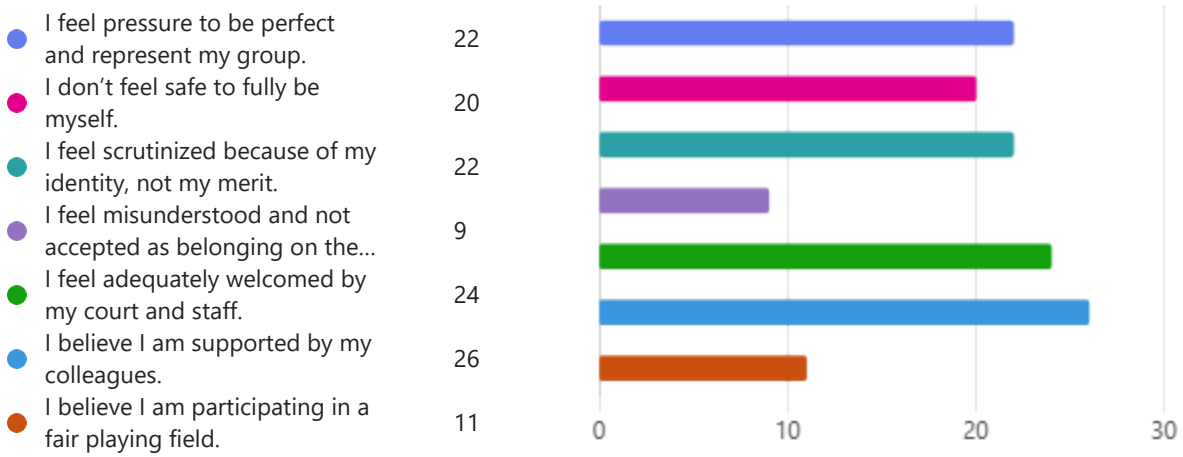
11. What perspectives or solutions have you turned to for addressing alcohol use (check all that apply)



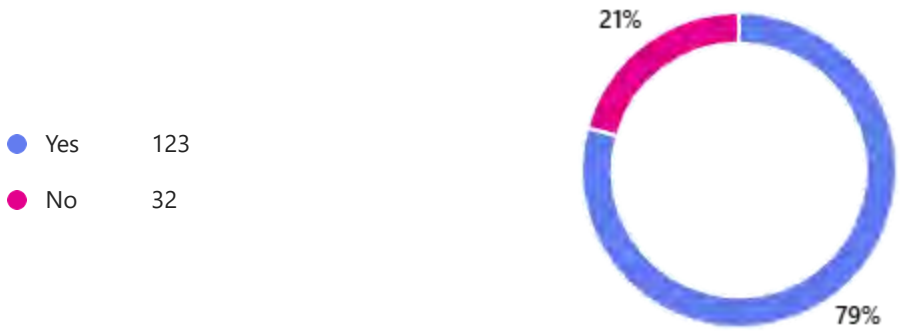

12. Do you identify as a member of an under-represented, minority, or marginalized group?



13. As a result do you experience any of the following, both positive and negative?

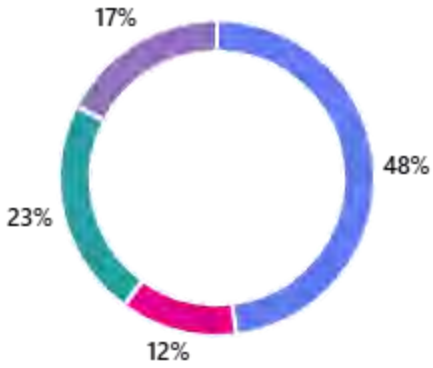



14. Do you handle after-hours search warrants?



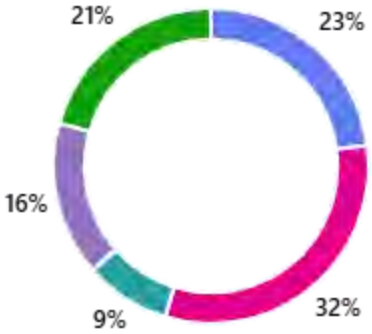
15. What impacts does after-hours search warrant work have upon your well-being? Check all that appl y:

| | |
|---|---|
| A reduction in sleep quality. | 113 |
| Second guessing decisions made after hours. | 28 |
| A decrease in work performance the next day. | 53 |
| Difficulty planning my personal life. | 41 |

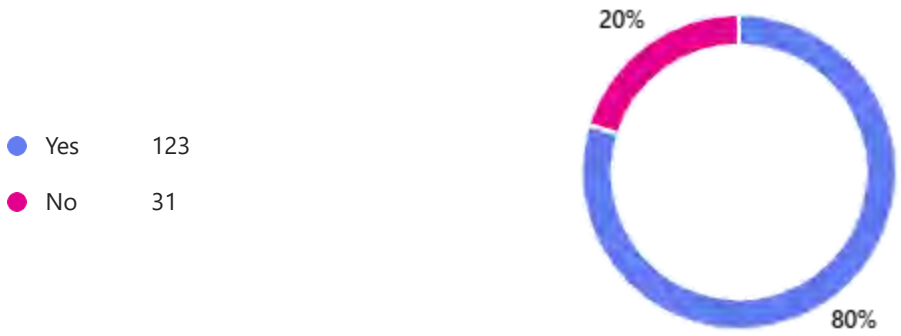



16. Have you ever felt discouraged that you do not serve on a higher court? Check all that apply.

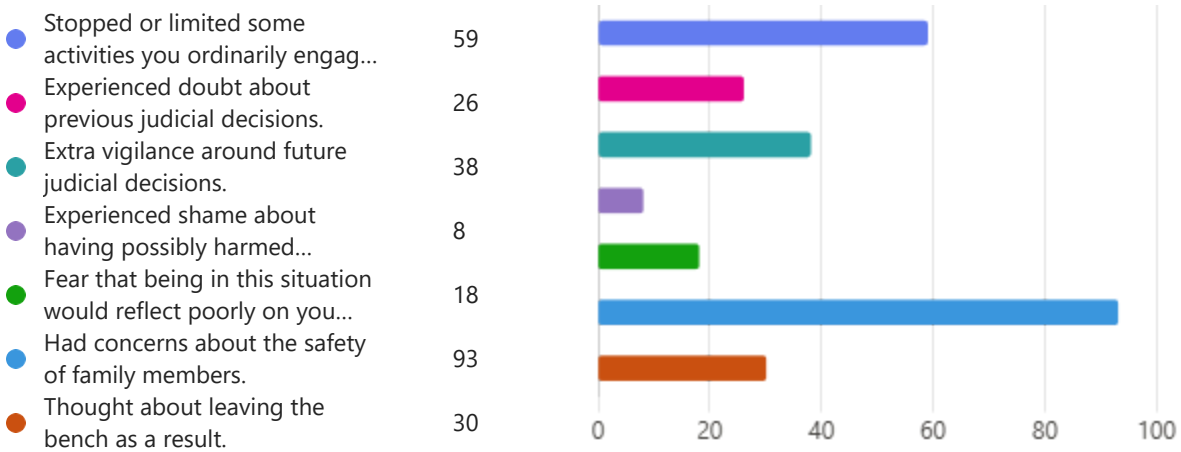
| | |
|---|---|
| I feel agency to move within or upwards within the profession. | 39 |
| I find the evaluation and promotion cycle draining. | 54 |
| I worry about my performance as it relates to my ratings. | 15 |
| I am disappointed by a lack of opportunity for promotion within the judiciary. | 27 |
| I think the system works fine and deserving people get appointed. | 35 |



17. Have you had disturbing communications from either current or past litigants or a member of the p ublic at large?

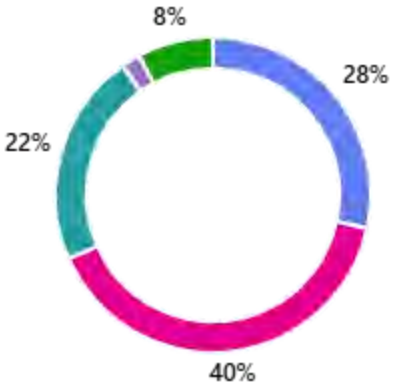



18. Which of the following did you experience as a result? Check all that apply.



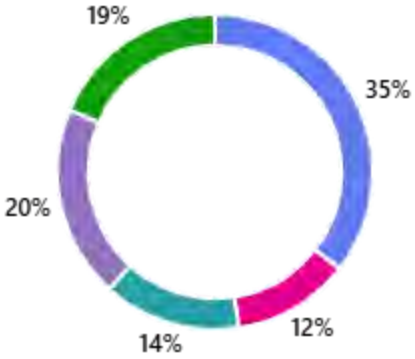
19. If you were concerned about another judge or yourself, would you be likely to contact the Judicial A ssistance Services Program (JASP)?

| | |
|---|---|
| Likely | 44 |
| Maybe | 62 |
| Unlikely | 34 |
| Definitely not | 3 |
| I have never heard of JASP | 12 |

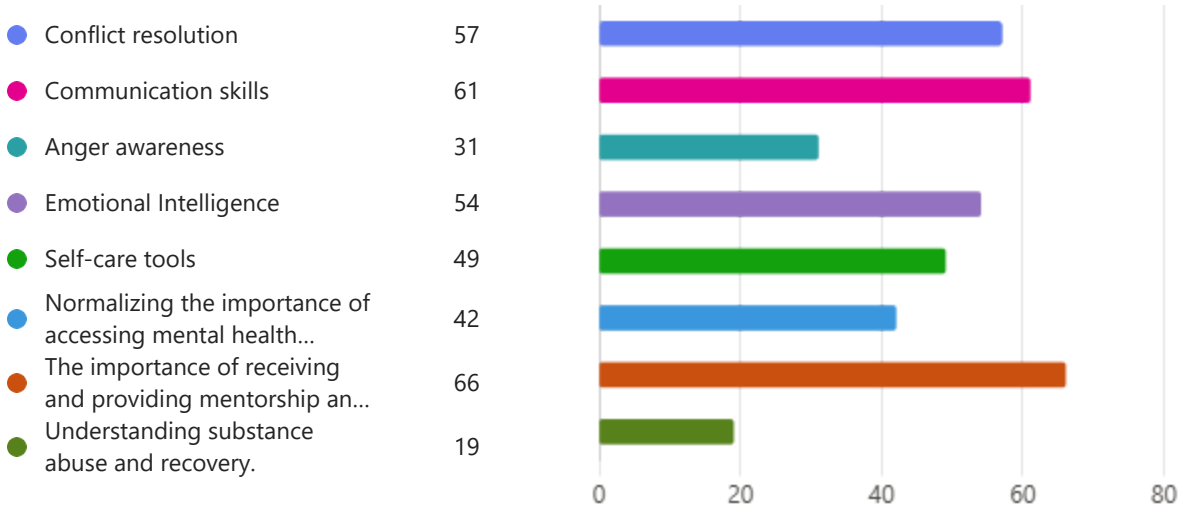



20. What resources would be useful in helping you stay on top of your workload? Check all that apply.

| | |
|---|---|
| Additional administrative support. | 88 |
| Consultations with a practice management advisor with expertise working with judges with complex... | 30 |
| Computer classes for software used by judges. | 35 |
| CLE focused upon practice management advice for judicial officers. | 49 |
| Other | 46 |

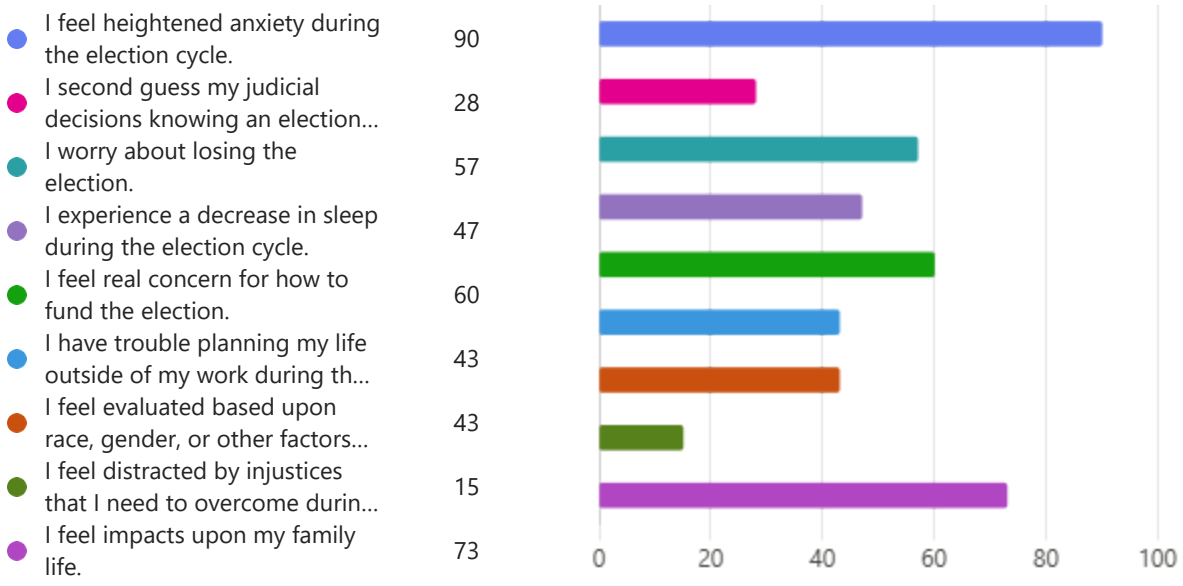


21. If you have attended or taught at judicial college, what skills do you wish had been taught that woul d have helped as a judge. Check all that apply:

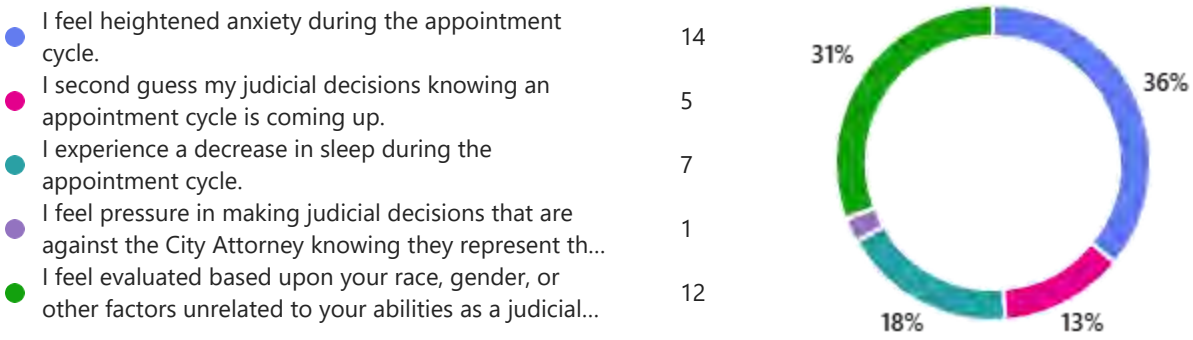



22. Are you an....

23. For elected judges check all that apply:




24. For appointed judges check all that apply:



25. What challenges with your mental well-being have you experienced in your time on the bench?

132
Responses

Latest Responses

"Working with other judges is not always easy"

"Alcoholism"

"Most of my challenges have arisen when I have felt isolated... "

• • •

26. To what extent do you have the collegial support you need? What ideas would help make a differen ce to increase belonging?

124
Responses

Latest Responses

"As in all workplaces, some colleagues are supportive and ea... "

"Unsure"

"Prior to my first day, I expected the rest of the bench to rec... "

• • •

27. What recommendations do you have for the judiciary that would improve the mental health of the i nstitution at large?

114
Responses

Latest Responses

"Promoting getting away from the Courthouse when you are... "

"Remove isolation, more emphasis on substance abuse."

"We need to intentionally engage in team building to decrea... "

• • •

28. Please share any other information you would like to share.

51
Responses

Latest Responses

"I think I have said enough!"

• • •

# APPENDIX F

# Workgroup Literature Reviews and Key Sources

WASHINGTON STATE
BAR ASSOCIATION

# Appendix F: Workgroup Literature Reviews and Key Sources

## Law Student and New Member Workgroup

The workgroup reviewed national and institutional studies including:

- Suffering in Silence: The Survey of Law Student Well-Being and the Reluctance of Law Students to Seek Help for Substance Use and Mental Health Concerns : Insights on mental health challenges like stress, substance abuse, and burnout among law students.
- Wellness & Wellbeing Initiative (University of Minnesota Law School): A student-led program promoting wellness through mentorship, events, and feedback.
- It Is Okay to Not Be Okay: The 2021 Survey of Law Student Well-Being: Highlights of mental health struggles faced by law students.
- The Phantom Menace to Professional Identity Formation and Law School Success: Imposter Syndrome: A study on imposter syndrome's effect on law students' development.
- A Brighter Future for Law Student Well-Being? Trends and initiatives for enhancing well-being in legal education.
- Additional insights and reporting from Gonzaga University, Seattle University, and the University of Washington.

**KEY THEMES INCLUDED:**

- **High stress and burnout**
- **Imposter syndrome**
- **Substance use and limited mental health access**
- **Institutional barriers to wellness**
- **Promising peer-led and institutional programs.**

## Diversity, Equity and Inclusion Workgroup

The workgroup reviewed national and institutional studies including:

- **2024 WSBA Membership Demographic Study:** Provided foundational data for equity planning.
- **WSBA Leadership Conversations:** Insights from Chief Equity & Justice Officer and Equity & Justice Lead on implementing the Equity and Justice Plan.
- **Council on Public Defense Race and Equity Subcommittee Report:** Addressed recruitment and retention gaps for BIPOC professionals.
- **Lawyers' Toolkit for Diversity & Inclusion (DC Bar):** Best practices for sustainable DEI change.
- **Massachusetts Supreme Judicial Court Affinity Bar Town Hall Report:** Identified barriers to retention and advancement for historically excluded groups.
- **WSBA Board of Governors Equity Plan:** Framework for equitable decision-making and accountability.
- **WSBA Member Well-Being Survey:** Highlighted disparities in stress, burnout, and resource utilization among minority legal professionals.

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors

From: Budget and Audit Committee

Subject: Recommendation RE: Client Protection Fund Assessment

Date: April 6, 2026

---

**ACTION REQUESTED:** The Budget and Audit Committee recommends to the Board of Governors that it recommend that the Supreme Court: Order an assessment to the Client Protection of $0 for the 2027 licensing year and $5 for the 2028 licensing year.

**BACKGROUND:**

The Client Protection Fund (CPF) assessment is charged to all licensed active members, House Counsel, Foreign Law Consultants, pro hac vice admissions, and Limited License Legal Technicians. The assessment is the main source of funding that supports gifts to compensate those financially victimized by legal professional dishonesty or failure to account for client funds/property. For over 20 years, the assessment has ranged from $10 to $30 and is set at $20 for 2026. The CPF is WSBA's sole legally restricted fund, with revenue and expenses accounted for separately and with designated separate bank accounts and investments. Depending on the health of the CPF reserves, the assessment amount may be adjusted. The level of reserves is most significantly impacted by the awards given each year. Payments are limited to a maximum of $150,000[1] per awardee, with a preliminary payment of no more than $10,000 (remaining funds awarded are paid out at the end of the fiscal year).

At its meeting on April 6, 2026, the Budget and Audit Committee evaluated the recommendations from the Client Protection Board (refer to *Attachment A*), which proposed establishing the assessment rate at $5 for both 2027 and 2028. The Committee considered the fund's requirements and historical performance, noting that the fund has experienced consistent growth over time and acknowledging that WSBA licensees view the total cost to practice as inclusive of this assessment. After deliberating on the balance between the fund's needs and the financial impact on licensees, the Committee approved an alternative proposal to set the assessment at $0 for 2027 and $5 for 2028. This recommendation was adopted by a vote of three in favor, one opposed, and one abstention.

**ATTACHMENTS:**

Attachment A: Client Protection Board Memo 3.20.2026
Attachment B: Memo Appendices A-C

[1] Amount pending Supreme Court approval of an APR 15 court rule change recommendation to increase the limit to $250,000.

WASHINGTON STATE
BAR ASSOCIATION

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

| | |
|---|---|
| **TO:** | Budget and Audit Committee of the WSBA Board of Governors, as Trustees of the Client Protection Fund |
| **FROM:** | Nicole Gustine, Assistant General Counsel |
| **DATE:** | March 20, 2026 |
| **RE:** | Client Protection Board Recommendations RE: CPF Assessment |

**ACTION REQUESTED:**

The Client Protection Board recommends to the Board of Governors that it recommend that the Supreme Court:

1. Order an assessment of $5 to the Client Protection Fund for the 2027 and 2028 licensing years.

## I. BACKGROUND

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

The CPB met on February 9, 2026, and in addition to considering claims to the Fund, considered the following recommendation regarding setting the CPF assessment for the 2027 and 2028 licensing years. The CPB examined historical and financial data and voted unanimously to make this recommendation to the Budget and Audit committee of the Board of Governors (BOG), who serve as Trustees of the Fund.

## II. Recommendation

### 1. Ask that the BOG recommend to the Supreme Court that it order an assessment of $5 to the Client Protection Fund for the 2027 and 2028 licensing years.

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

WSBA Director of Finance Tiffany Lynch asked that the CPB make a recommendation as to setting the assessment for the 2027 licensing year. For historical context, between 2010 and 2020, the assessment was set at $30. Due to the Covid-19 pandemic, the BOG recommended, and the Supreme Court agreed, to order that the assessment be set at $10 in 2021. The assessment was then raised to $20 in 2022 and 2023, lowered to $15 in 2024, and then back to $20 for 2025 and 2026. (Appendix A). As of December

31, 2025, the Fund had a balance of $5,513,949 (Appendix B). Since 2015, the amounts of gifts paid on eligible applications to the Fund ranged from a low of $318,584 in 2017, to a high of $917,051 in 2018. (Appendix C).

Though the maximum gift is currently set at $150,000, that amount will potentially be increased to $250,000 pending Supreme Court approval of an APR 15 court rule change recommendation. The rule change is currently open for comment until April 2026, meaning that this change could be effective as soon as spring of 2026. The total amount of gifts requested on open applications is $6,038,120.12. Due to gift limits, this represents a current maximum exposure to the Fund of approximately $1,988,120.12, calculating with the current $150,000 maximum gift, or $2,288,120.12 calculating with the potential future $250,000 maximum gift.

Weighing both the healthy balance of the Fund with the potential for increasing gift demand, the CPB voted unanimously to set the assessment at $5 for both the 2027 and 2028 licensing years.

## III. Conclusion

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

| Year | Assessment | Order |
|---|---|---|
| 2028 | | |
| 2027 | | |
| 2026 | $20 | 25700-B-734 |
| 2025 | $20 | 25700-B-705 |
| 2024 | $15 | 25700-B-670 |
| 2023 | $20 | 25700-B-655 |
| 2022 | $20 | 25700-B-655 |
| 2021 | $10 | 25700-B-641, 25700-B-599 |
| 2010-2020 | $30 | 25700-B-587, 25700-B-496 |
| 2007-2009 | $15 | |
| 2001-2006 | $13 | |
| 1996-2000 | $10 | |

**Statement of Financial Position**

| | Unaudited As of 12/31/2025 |
|---|---|
| Assets | |
| Checking Account | 250,092 |
| Accrued Interest Receivable | 15,996 |
| Money Market | 4,257,713 |
| Investments | 990,148 |
| Money Market | - |
| **Total Assets** | 5,513,949 |
| | |
| Liabilities and Net Assets | |
| Approved gifts to injured clients payable | 69,162 |
| Liability to WSBA general fund | (71,712) |
| Net Assets | 5,516,499 |
| **Total liabilities and net assets** | 5,513,949 |

**Statement of Activities**

| | Unaudited As of 12/31/2025 |
|---|---|
| Revenue | |
| Donations | 2,000 |
| Restitution | 1,395 |
| Member Assessment | 207,120 |
| Interest | 52,690 |
| **Total Revenue** | 263,205 |
| | |
| Expenses | |
| Misc. | (66) |
| Gifts to Injured Clients | 2,500 |
| CPF Board | 732 |
| Staff Membership Dues | - |
| Indirect (overhead) | 50,632 |
| **Total Expense** | 53,798 |
| | |
| Net Income (Expense) | 209,407 |

**Statement of Changes in Net Assets**

| | |
|---|---|
| Balance at September 30, 2025 | 5,307,092 |
| Net Income as of December 31, 2025 | 209,407 |
| Balance as of November 30, 2025 | 5,516,499 |

SECTION III

# Finances

The CPF is financed by an assessment as described in Section II: CPF Procedures. The CPF is maintained as a trust, separate from other funds of the WSBA. In addition, interest on those funds accrues to the CPF, and any restitution paid by members is added to the CPF balance. The CPF is self-sustaining; administrative costs of the CPF, such as Board expenses and WSBA staff support, are paid from the CPF.

| FISCAL YEAR | PENDING APPLICATIONS AT START OF FY | CPF BEGINNING BALANCE[4] | CPF REVENUES RECEIVED | BOARD EXPENSES AND OVERHEAD[5] | RESTITUTION RECEIVED | GIFTS RECOGNIZED FOR PAYMENT |
|---|---|---|---|---|---|---|
| 2015 | $1,229,864 | $1,746,010 | $990,037 | $90,315 | $3,703 | $490,357 |
| 2016 | $13,203,653 | $2,144,289 | $1,001,198 | $129,553 | $2,970 | $371,452[6] |
| 2017 | $1,463,914 | $2,646,222 | $1,024,954 | $113,672 | $3,709 | $318,584 |
| 2018 | $2,045,175 | $3,242,299 | $1,040,498 | $166,969 | $28,255 | $917,051[7] |
| 2019 | $3,206,880 | $3,227,988 | $1,110,963 | $146,618 | $8,347 | $379,818 |
| 2020 | $3,342,227 | $3,816,143 | $1,099,237 | $141,514 | $15,351 | $591,449[8] |
| 2021 | $4,690,958 | $4,193,130 | $368,170 | $151,055 | $137,971 | $499,637 |
| 2022 | $4,252,961 | $4,046,246 | $740,321 | $162,100 | $8,906 | $587,815 |
| 2023 | $1,583,390 | $4,063,501 | $961,358 | $173,059 | $9,177 | $342,424 |
| 2024 | $5,094,587 | $4,513,398 | $816,420 | $180,831 | $27,839 | $436,328 |

4. It is important for the CPF to maintain a sufficient balance to meet anticipated future needs. It is impossible to predict from year to year how many meritorious claims injured applicants will make.
5. Board expenses and overhead include WSBA staff time to administer the CPF, including processing of applications, helping members of the public, investigating claims, and making recommendations to the Board.
6. The amount of gifts recognized in the FY 2016 financial statements overstates by $115,000 due to a duplicate recording of approved gifts, correct in FY 2017. This explains the substantial difference between the amounts listed for FY 2016 and FY 2017 under this column as compared with the "Gifts Approved" column on page 1.
7. The amount of gifts recognized in the FY 2018 financial statements understates by $9,383 due to unclaimed CPF gifts that expired in FY 2018.
8. The amount of gifts recognized in the FY 2020 financial statements overstates by $5,183, due to interest owed to an applicant and a payment voided in FY 2021. This explains the difference between the amounts listed for FY 2020 under this column as compared with the "Gifts Approved" column on page 1.

WASHINGTON STATE
BAR ASSOCIATION

Court Rules and Procedures Committee

**MEMORANDUM AND REQUEST**

**TO:** WSBA Board of Governors (BOG)
Terra Nevitt, Executive Director

**FROM:** Andrew Yi, Chair, Court Rules and Procedures Committee

**DATE:** April 7, 2026

**RE:** Request to delegate WSBA BOG authority to the WSBA Court Rules and Procedures Committee for initial pre-screening of proposed rule changes under GR 9(f)(2)

---

**ACTION**: Approve Chair Yi's request to delegate authority to the Court Rules and Procedures Committee for initial pre-screening of proposed rule changes under GR 9(f)(2).

**Discussion**

General Rule (GR) 9 governs the Supreme Court's rulemaking procedures. Specifically, GR 9(f)(1) states that the Supreme Court initially determines whether a suggested rule has merit and whether it involves a significant or merely technical change. GR 9(f)(2) states that after making this initial determination, the Supreme Court "shall" forward each suggested rule (except those deemed without merit) to WSBA, the Superior Court Judges Association (SCJA), the District and Municipal Court Judges Association (DMCJA), and the Chief Presiding Judge of the Court of Appeals (COA) for their consideration. These entities may then comment in advance of publication to the general public for comment.

This practice seems to have subsided in recent years. To that end, I met with Judges Janet Chung (COA), Wade Samuelson (DMCJA), Catherine McDowall (DMCJA), and Paul Crisalli (SCJA), who are the chairs of their respective organizations' court rules committees. We agreed to approach the Supreme Court about reverting to the procedure outlined in GR 9. I am pleased that Justice Salvador Mungia (Chair of the Supreme Court's Rules Committee) and Chief Justice Stephens wrote back and are fully in support of following the GR 9 pre-screening procedure. In addition, it appears that the Court is now following the procedure, as evidenced by the fact that they have sent out several suggested rule changes to the various entities outlined in GR 9 in recent weeks.

Any proposed comments by the WSBA's Court Rules and Procedures Committee (Committee) must be approved by the WSBA Board of Governors (BOG) and the timing of BOG meetings, as well as the deadline to have items added to the meeting agendas, makes it very difficult for the Committee to make any

comments during this pre-screening procedure. Accordingly, I am requesting that the WSBA BOG delegate authority to the Committee to speak on behalf of the BOG in this initial screening procedure. The Committee's comments would be limited to those comments which have majority support in the Committee and the initial procedure is meant to merely pre-screen suggested rule changes. This would not hinder the BOG's ability to approve comments after the suggested rule changes are published for public comment.

Without this ability, I fear that the Committee will effectively not be able to do anything during the pre-screening procedure. This initial screening process by the various entities outlined in GR 9 is vital to ensure potential issues with proposed rule changes are identified, as well as in separating less meritorious revisions from those that would truly improve the administration of justice in our state. I strongly urge the BOG to vote to give the Committee the authority to act during this pre-screening procedure without the need to have the full BOG take a vote on every single proposed comment from the committee. This is necessary to ensure that WSBA has a voice during this pre-screening procedure.

Sincerely,

Andrew Yi, WSBA Court Rules and Procedures Committee Chair

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 Box under 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 change is primarily on costs associated with indirect expenses for staff time dedicated to assisting with 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 proposal is designed to comply with Rule 9(f)(2) and address the timing limitations of bringing proposed comments to the Board of Governors during their regular meeting schedule. If this proposal is approved, we suggest that the Court Rules and Procedures Committee apply an equity lens when engaging in its review during the prescreening process. 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.

WASHINGTON STATE
BAR ASSOCIATION

**TO:** WSBA Board of Governors and Governors-Elect

**CC:** Terra Nevitt, Executive Director

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

Mark Fucile, Chair, Committee on Professional Ethics

**DATE:** March 19, 2026

**RE:** Committee on Professional Ethics – New Advisory Opinion on the Unauthorized Practice of Law Pertaining to Opposing Counsel - For Information Only

**Committee on Professional Ethics New Advisory Opinion on the Unauthorized Practice of Law that addresses the professional and ethical responsibilities of attorneys who may have adversaries engaging in the unauthorized to practice law in Washington —For Information Only**

**INFORMATION ONLY**: This new Advisory Opinion 2026-XX addresses whether a Washington lawyer, in the course of representing their own client, violates RPC 5.5(a) or RPC 8.4(a) by knowingly assisting another in engaging in the unauthorized practice of law in Washington ("UPL") if the lawyer knows that the adverse party in the matter is represented by someone who is not authorized to practice law in Washington.

The RPCs that are contained in this advisory opinion are: **1.0A(f), 1.0A(m), 1.1, 1.4, 1.16, 4.1, 5.5(a), 5.8, 8.3, 8.4, 8.5(b)**

The Committee on Professional Ethics subcommittee is composed of Sara Ayoubi, Zachary Dillon and Peter Jarvis. This subcommittee drafted this opinion in response to a request for guidance on this issue. The goal of this opinion is to provide clarity on the complex nature of what constitutes "assisting" the unauthorized practice of law under RPC 5.5(a) and 8.4(a). We also discuss other risks to the attorney who may find themselves in this situation.

Stakeholders

The subcommittee reached out to several stakeholders including the following WSBA sections:

1. Business section
2. Litigation section
3. Family Law section
4. Solo & small practice section
5. Criminal Law section
6. International practice section

Additionally, the subcommittee reached out to the Licensed Legal Technician and Limited Practice Officer boards.

We received comments back from one stakeholder, which essentially thanked us for our efforts and that guidance on this topic was appreciated.

Approval by CPE

The Committee on Professional Ethics (CPE) approved this advisory opinion at the February 20th, 2026, meeting.

Conclusion

We are requesting that the BOG approve this advisory opinion for publication. This opinion will provide much needed guidance for attorneys who are concerned about how their conduct might inadvertently violate the RPCs when working with parties who are not authorized to practice law in Washington State.

Attachment

*WSBA Ethics Advisory Opinion*

**AO2026XX**

Introduction: This Advisory Opinion addresses whether a Washington lawyer, in the course of representing their own client, violates RPC 5.5(a) or RPC 8.4(a) by knowingly assisting another in engaging in the unauthorized practice of law in Washington ("UPL") if the lawyer knows that the adverse party in the matter is represented by someone who is not authorized to practice law in Washington.

Summary: A Washington lawyer's representation of a client who is adverse to a party that is known by the lawyer to be represented by someone engaging in UPL in a matter not in litigation does not by itself violate RPC 5.5(a) or RPC 8.4(a). [n.1] This does not mean, however, that there are no risks of other RPC violations. In matters in litigation, the lawyer must at a minimum notify the court of the known UPL.

Cited Rules: 1.0A(f), 1.0A(m), 1.1, 1.4, 1.16, 4.1, 5.5(a), 5.8, 8.3, 8.4, 8.5(b)

## Detailed Analysis

### A. The Lawyer's Background Obligation to Consult with the Client about the UPL

Before addressing UPL-related questions themselves, we note that lawyers owe their own clients duties of competent representation and communication under RPC 1.1 and 1.4. [n.2] Since the fact that an adverse party is represented by someone engaged in UPL could reasonably affect the lawyer's own client at some point in time (because, for example, the adverse party might subsequently claim that the lawyer and the client took unfair advantage of the adverse party), a lawyer who knows of the UPL by the adverse party's representative must inform their own client before proceeding. In the discussion which follows, we assume that the lawyer will either act in accordance with the client's directions as limited by the RPCs or withdraw under RPC 1.16.

### B. The Lawyer's Knowledge of the Existence of UPL

UPL and the exceptions to what would otherwise constitute UPL are defined in Washington in GR 24 and in multiple Washington judicial decisions. [n.3] Although a complete discussion and definition of what constitutes the authorized or unauthorized practice of law is beyond the scope of this Advisory Opinion and the authority of this Committee, we will assume for purposes of this opinion that it is or at least may be UPL for someone to represent another in a matter that requires significant legal skill and training. [n.3]

Before a lawyer could be said to violate RPC 5.5(a) or RPC 8.4(a) solely by representing the lawyer's own client when the adverse party's representative is engaging in UPL, a lawyer would first have to have actual knowledge of the existence of the UPL [n.4] RPC 1.0A(f) provides that "'knowingly,' 'known,' or 'knows' denotes actual knowledge of the fact in question. A person's knowledge may be inferred from circumstances."

It will often be difficult for a lawyer to "know" that the adverse party's representative is engaged in UPL especially when the adverse party's representative is expressly authorized to practice in one or more jurisdictions. *See, e.g.,* RPC 5.5(c) (allowing for the temporary practice of law in Washington by lawyers licensed elsewhere in various circumstances); RPC 5.5(d) (allowing for the practice of law by a non-Washington lawyer if permitted by federal preemption). In addition, ABA Formal Op. 23-504, *Choice of Law*, makes plain that there are many circumstances in which the choice of professional responsibility law will be less than clear in multistate matters. Whether UPL exists may also be unclear at times even when the adverse party's representative is not expressly authorized to practice in any jurisdiction. For example, it is not always clear when or to what extent practitioners of other professions including, for example, accountants and insurance agents, may permissibly advise their clients on law-related matters, and we express no opinion on the extent to which this may be so. *See e.g. Jones v. Allstate Ins. Co*., 146 Wash.2d 29, 45 P.3d 1068 (2002) (noting that the Washington Supreme Court may in some instances allow nonlawyers to engage in what might otherwise have been considered UPL). Thus, it will often be true that a lawyer may suspect or think, but not actually know, that an opposing party's representative is engaging in UPL. Nonetheless, there will be times when the lawyer actually knows that that adverse party's representative is doing so.

### C. "Assisting" UPL Under RPC 5.5(a) and 8.4(a)

RPCs 5.5(a) provides that "A lawyer shall not practice law in a jurisdiction in violation of the regulation of the legal profession in that jurisdiction or assist another in doing so." RPC 8.4(a) provides that it is professional misconduct for a lawyer to "knowingly assist or induce another to [engage in UPL] or do so through the acts of another." Neither rule is violated unless the lawyer has actual knowledge (as defined above) of UPL by the adverse party's representative. If that knowledge is present, the key question becomes whether that knowledge, in and of itself, is sufficient to constitute "assist[ing]" another in UPL, "induc[ing]" another to do so, or "do[ing] so through the acts of another." Although there is no Washington authority on all fours, we conclude that no UPL is present based on mere knowledge of the existence of the UPL.

As used in RPC 5.5(a) and RPC 8.4(a), the word "assist" is generally understood and interpreted according to its ordinary meaning as connoting some degree of affirmative cooperation, help, facilitation, guidance, or aid, as opposed to a failure to intervene—at least where the lawyer has no other affirmative ethical duty to supervise the conduct. *See generally* ABA Annotated Model Rules of Professional Conduct 593-96, 765-66 (10th ed. 2023) (commenting that Rule 5.5(a) prohibits a lawyer from "helping" someone else engage in UPL and referencing as examples of this misconduct lending legitimacy to unlicensed individuals or disbarred or suspended lawyers, working with and on the same side as unauthorized out of state lawyers, and failing to adequately supervise nonlawyer subordinates).

Similarly, Hazard, Hodes, Jarvis & Thompson, *The Law of Lawyering* § 47.02 (4th ed. 2025-2 Supp.) provides that "because one of the obligations of a lawyer is to avoid assisting UPL (Rule

5.5(a)), lawyers must take affirmative steps to ensure that lay persons *subject to their control*, such as paralegal workers, secretaries, or investigators, do not cross over the line into UPL" (emphasis added). The treatise then contrasts a lawyer's need to supervise the nonlawyer's own nonlawyer employees with the situation of a lawyer who happens to represent a party to a proposed transaction in which the adverse party is represented by a person engaged in UPL. In the latter situation, the lawyer "is not thereby impermissibly assisting *that person* in UPL." Hazard, Hodes, Jarvis & Thompson, *The Law of Lawyering* § 47.07 (4th ed. 2025-2 Supp) (emphasis in original). The treatise also cites to and quotes from N.Y. State Bar Ass'n Ethics Op. 809 (2007) which concludes:

> We do not believe that merely continuing to represent one's *own* client-in a transaction into which a third party, *not under the lawyer's (or client's) control*, has chosen to introduce a non-lawyer who is engaging in UPL-is aiding that non-lawyer in UPL. Absent any affirmative intent or desire to substantially assist the non-lawyer in UPL, or some direct financial or other benefit to the lawyer from the non-lawyer's engaging in UPL (other than the ordinary benefit arising from completing the transaction for which the lawyer was engaged), the lawyer is not aiding UPL. All the lawyer is doing is representing a client; *the incidental effect* of that proper act is that the non-lawyer is able to engage in UPL.

(Footnote omitted.) [n.5]

This approach is consistent with the leading published Washington State case in this general area—*In re Disciplinary Proceeding Against Shepard*, 169 Wash. 2d 697, 239 P.3d 1066 (2010). In *Shephard*, the lawyer "assisted" in UPL because he was an active participant in a scheme in which nonlawyers operated a living trust mill: "By allowing his name and title to be used to add legitimacy to the sale of the [living trust documents], Shepard aided [a nonlawyer] in the unauthorized practice of law." *Id.* at 712. In other words, some affirmative action or involvement for the purpose of helping someone engage in involvement must exist before the lawyer representing a client in a matter can be said to be assisting UPL or otherwise violating RPC 5.5(a) or 8.4(a). [n.6]

This also makes sense because a lawyer's duties run primarily to the lawyer's own client and not to the adverse party. For example, a lawyer who knows that an adverse party's lawyer has performed incompetently when representing the adverse party does not owe duties of competence and communication to the adverse party equal to what the lawyer owes the lawyer's own client.

In conclusion, no violation of RPC 5.5(a) or RPC 8.4(a) exists solely because a lawyer knows that the adverse party's representative is engaged in UPL.

### D. Other RPC Risks to the Lawyer

This does not mean, however, that a lawyer who knows that the adverse party is being represented by someone engaging in UPL is free from other RPC-related risks.

Suppose, for example, that the matter in question involves litigation. "When an unlicensed advocate knowingly appears in court without a court's permission or proper licensure from the bar, they commit a fraud on the court …." *Matter of Lewis*, 200 Wash.2d 848, 874, 523 P.3d 760 (2023) (emphasis in original). Most courts are likely to conclude that a lawyer's silence in the face of the adverse party's representation by someone known by the lawyer to be engaging in UPL—and a lawyer's participation in, for example, such ministerial acts as submitting documents to the court which reflect signatures by the" attorneys" for each party—violate court rules or the duty of candor owed to the court and therefore constitute, "mak[ing] "a false statement of fact or law to a tribunal" in violation of RPC 3.3(a), making "a false statement of material fact or law to a third person" in violation of RPC 4.1(a), "conduct involving dishonesty, fraud, deceit or misrepresentation" in violation of RPC 8.4(c), or "conduct that is prejudicial to the administration of justice" in violation of RPC 8.4(d). [n.7]

In addition, a lawyer with knowledge of the UPL by the representative of the adverse party would also need to avoid any conspiracy or plan with the representative to defraud the adverse party. Cf. *In re Smith*, 170 Wash.2d 721, 246 P.3d 1224 (2011)(disbarring lawyer following conviction for conspiracy to commit securities fraud). [n.8]

Lastly, a lawyer with knowledge of the UPL may wish to consider whether they should report the misconduct under RPC 8.3, albeit subject to any limitations based on the duty of confidentiality to their client under RPC 1.6. [n.9]

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Endnotes:

1. In this opinion, we assume that the lawyer is not otherwise profiting from, supporting, or aiding and abetting the representative of the adverse party who is engaged in UPL. *Cf.* RPC 5.8(b) and RCW 2.48.220(9), quoted in note 6 below.

2. RPC 1,1 provides that:

   > A lawyer shall provide competent representation to a client. Competent representation requires the legal knowledge, skill, thoroughness and preparation reasonably necessary for the representation.

   RPC 1.4 provides in pertinent part that:

(a) A lawyer shall:

(1) promptly inform the client of any decision or circumstance with respect to which the client's informed consent, as defined in Rule 1.0A(e), is required by these Rules;

(2) reasonably consult with the client about the means by which the client's objectives are to be accomplished;

(3) keep the client reasonably informed about the status of the matter;

(4) promptly comply with reasonable requests for information; and

(5) consult with the client about any relevant limitation on the lawyer's conduct when the lawyer knows that the client expects assistance not permitted by the Rules of Professional Conduct or other law.

(b) A lawyer shall explain a matter to the extent reasonably necessary to permit the client to make informed decisions regarding the *representation.*

3. GR 24(a) provides as a general definition that:

The practice of law is the application of legal principles and judgment with regard to the circumstances or objectives of another entity or person(s) which require the knowledge and skill of a person trained in the law. This includes but is not limited to:

(1) Giving advice or counsel to others as to their legal rights or the legal rights or responsibilities of others for fees or other consideration.

(2) Selection, drafting, or completion of legal documents or agreements which affect the legal rights of an entity or person(s).

(3) Representation of another entity or person(s) in a court, or in a formal administrative adjudicative proceeding or other formal dispute resolution process or in an administrative adjudicative proceeding in which legal pleadings are filed or a record is established as the basis for judicial review.

(4) Negotiation of legal rights or responsibilities on behalf of another entity or person(s).

GR 24(b) then provides a list of exceptions and inclusions to what would or might otherwise constitute UPL.

4. *See, e.g.,* Nancy J. Moore, *Mens Rea Standards in Lawyer Disciplinary Codes*, 23 Geo. J. Legal Ethics 1, 3 (2010) ("I suggest the following default mens rea standards for disciplinary provisions: negligence in rules designed to protect clients and knowledge in rules designed to protect courts and third parties.") (Footnotes omitted.)

5. The footnote to the New York opinion states that the opinion is "limited to transactional situations and does not encompass situations involving litigation, in which there may be, for example, special duties to the court." *Id*. at note 1. As noted further in text below, we agree.

6. This interpretation is also consistent with RPC 5.8(b) and RCW 2.48.220(9). RPC 5.8(b) provides that:

> A lawyer shall not engage in any of the following with a lawyer or LLLT who is disbarred or suspended or who has resigned in lieu of disbarment or discipline or whose license has been revoked or voluntarily cancelled in lieu of discipline:
>
> (1) practice law with or in cooperation with such an individual;
>
> (2) maintain an office for the practice of law in a room or office occupied or used in whole or in part by such an individual;
>
> (3) permit such an individual to use the lawyer's name for the practice of law;
>
> (4) practice law for or on behalf of such an individual; or
>
> (5) practice law under any arrangement or understanding for division of fees or compensation of any kind with such an individual.

RCW 2.48.220(9) provides that an attorney may be disciplined for:

> Practicing law with or in cooperation with a disbarred or suspended attorney, or maintaining an office for the practice of law in a room or office occupied or used in whole or in part by a disbarred or suspended attorney, or permitting a disbarred or suspended attorney to use his or her name for the practice of law, or practicing law for or on behalf of a disbarred or suspended attorney, or practicing law under any arrangement or understanding for division of fees or compensation of any kind with a disbarred or suspended attorney or with any person not a licensed attorney.

Both provisions require additional support or involvement by a lawyer above and beyond the knowledge that an adverse party's representative is engaging in UPL before the lawyer can be said to be acting impermissibly.

7. RPC 1.0A(m) defines tribunals as including more than just courts:

> "Tribunal" denotes a court, an arbitrator in a binding arbitration proceeding or legislative body, administrative agency or other body acting in an adjudicative capacity. A legislative body, administrative agency or other body acts in an adjudicative capacity when a neutral official, after the presentation of evidence or legal argument by a party or parties, will render a binding legal judgment directly affecting a party's interests in a particular matter.

Because the rules of non-court tribunals vary widely, we express no opinion on whether the rules of non-court tribunals would require a lawyer to disclose the lawyer's knowledge of UPL by the adverse party's representative.

8. It is not necessary to consider whether the lawyer might have a duty to report the adverse party's representative to the bar under RPC 8.3 because the Washington version of this rule is not mandatory.

9. Unlike many other jurisdictions, Washington RPC 8.3(a) uses the phrase "should inform the appropriate authority" rather than "shall" or "must." Thus, this is a permissive duty rather than a mandatory one. Even so, lawyers are encouraged to report serious RPC violations when it is consistent with RPC 1.6 to do so. *See* cmt. [1] to RPC 8.3.

WASHINGTON STATE
BAR ASSOCIATION

# Financial Reports

## (Unaudited)

## Year to Date February 28, 2026

**Prepared by**
**Maggie Yu, Controller**

**Submitted by**
**Tiffany Lynch, Director of Finance**
**March 26, 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 February 28, 2026
As % of Completion to Annual Budget

| | % of Year | Current Year % YTD | Current Year $ Difference Favorable/(Unfavorable) | Prior Year YTD | Comments |
|---|---|---|---|---|---|
| **Total Salaries & Benefits** | **42%** | **42%** | **$(30,563)** | **41%** | **Unfavorable to budget due to higher medical cost and timing of annual payment for transportation allowance.** |
| **Other Indirect Expenses*** | **42%** | **36%** | **$272,767** | **44%** | **Favorable to budget due to timing of expenses for legal professional fees, workplace benefits, and IT direct expenses.** |
| **Total Indirect Expenses** | **42%** | **41%** | **$242,204** | **42%** | **Favorable to budget resulting from other indirect expenses described above.** |
| **General Fund Revenues** | **42%** | **46%** | **$962,011** | **45%** | **Favorable to budget due to timing of collection of fees for summer bar and LPO exams, Law Clerks, pro hac vice, MCLE, and reimbursement from sections as well as higher than anticipated advertising revenue and new member product sales.** |
| **General Fund Indirect Expenses** | **42%** | **41%** | **$240,778** | **42%** | **Favorable to budget as described for indirect expenses above.** |
| **General Fund Direct Expenses** | **42%** | **31%** | **$304,392** | **30%** | **Favorable to budget due to timing of program activities and meetings/events.** |
| **General Fund Net** | **42%** | **-223%** | **$1,507,180** | **-134%** | **Favorable to budget for the reasons described above.** |
| **CLE Revenue** | **42%** | **41%** | **$(8,671)** | **43%** | **Unfavorable to budget due to lower seminar revenue and timing of deskbook royalty payments.** |
| **CLE Direct Expenses** | **42%** | **19%** | **$101,138** | **12%** | **Favorable to budget due to timing of expenses for seminar activities.** |
| **CLE Indirect Expenses** | **42%** | **42%** | **$1,864** | **43%** | **Slightly favorable to budget due to other indirect expense savings as described above.** |
| **CLE Net** | **42%** | **-30%** | **$94,330** | **207%** | **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 February 01, 2026 to February 28, 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 | - | - | 99,017 | 253,348 | 13,667 | 112,600 | 112,683 | 365,948 | (112,683) | (365,948) |
| Admissions/Bar Exam | 887,460 | 1,479,440 | 423,291 | 1,089,992 | 111,787 | 459,830 | 535,078 | 1,549,822 | 352,382 | (70,382) |
| Advancement FTE | | - | 131,372 | 315,609 | 140 | 6,600 | 131,512 | 322,209 | (131,512) | (322,209) |
| Bar News | 255,188 | 529,600 | 136,160 | 331,526 | 171,450 | 382,945 | 307,610 | 714,471 | (52,422) | (184,871) |
| Board of Governors | - | - | 97,128 | 238,885 | 94,244 | 417,665 | 191,372 | 656,550 | (191,372) | (656,550) |
| Conference & Broadcasting Services | - | - | 34,270 | 83,138 | - | - | 34,270 | 83,138 | (34,270) | (83,138) |
| Character & Fitness Board | - | - | 66,288 | 159,981 | 8,042 | 23,050 | 74,330 | 183,031 | (74,330) | (183,031) |
| Communications Strategies | - | 3,000 | 298,373 | 741,101 | 25,719 | 189,015 | 324,091 | 930,116 | (324,091) | (927,116) |
| Communications Strategies FTE | | - | 107,398 | 257,458 | - | - | 107,398 | 257,458 | (107,398) | (257,458) |
| Discipline | 44,393 | 85,000 | 2,605,503 | 6,614,175 | 73,441 | 185,509 | 2,678,944 | 6,799,684 | (2,634,551) | (6,714,684) |
| Diversity | 135,000 | 135,000 | 125,601 | 342,071 | 9,465 | 62,575 | 135,065 | 404,646 | (65) | (269,646) |
| Entity Regulation | 8,000 | 75,500 | 47,447 | 115,083 | 1,940 | 27,973 | 49,387 | 143,055 | (41,387) | (67,555) |
| Facilities & Operations | - | - | 315,323 | 746,702 | 990 | 2,565 | 316,313 | 749,267 | (316,313) | (749,267) |
| Finance | 249,345 | 600,000 | 505,008 | 1,225,253 | 2,654 | 4,920 | 507,662 | 1,230,173 | (258,317) | (630,173) |
| Foundation | - | - | 70,701 | 175,440 | 4,555 | 19,185 | 75,256 | 194,625 | (75,256) | (194,625) |
| Human Resources | - | - | 281,683 | 540,066 | - | - | 281,683 | 540,066 | (281,683) | (540,066) |
| Law Clerk Program | 251,567 | 224,000 | 68,838 | 177,416 | 17,778 | 67,409 | 86,615 | 244,825 | 164,952 | (20,825) |
| Legislative | - | - | 108,094 | 270,801 | 9,989 | 24,790 | 118,083 | 295,591 | (118,083) | (295,591) |
| Legal Lunchbox | 29,090 | 34,000 | 24,579 | 59,925 | 4,422 | 8,100 | 29,001 | 68,025 | 89 | (34,025) |
| Licensing and Membership Records | 259,523 | 494,260 | 328,964 | 807,725 | 11,200 | 22,680 | 340,164 | 830,405 | (80,641) | (336,145) |
| Licensing Fees | 7,326,078 | 17,652,266 | - | - | - | - | 0 | - | 7,326,078 | 17,652,266 |
| Limited License Legal Technician | 7,578 | 17,287 | 27,565 | 68,332 | 842 | 10,000 | 28,407 | 78,332 | (20,829) | (61,045) |
| Limited Practice Officers | 79,526 | 182,000 | 37,400 | 92,656 | 8,659 | 32,704 | 46,059 | 125,360 | 33,468 | 56,640 |
| Mandatory CLE | 691,925 | 1,338,250 | 296,288 | 694,269 | 61,116 | 153,032 | 357,404 | 847,301 | 334,521 | 490,949 |
| Member Wellness Program | 2,000 | 9,000 | 101,133 | 242,930 | 1,484 | 13,100 | 102,617 | 256,030 | (100,617) | (247,030) |
| Member Services & Engagement | 4,800 | 15,300 | 127,495 | 309,044 | 11,755 | 125,020 | 139,250 | 434,064 | (134,450) | (418,764) |
| Mini CLE | - | - | 54,963 | 134,341 | - | - | 54,963 | 134,341 | (54,963) | (134,341) |
| New Member Education | 91,431 | 142,000 | 48,576 | 118,278 | - | 3,700 | 48,576 | 121,978 | 42,855 | 20,022 |
| Office of General Counsel | 1,000 | - | 438,274 | 1,116,772 | 4,276 | 26,750 | 442,550 | 1,143,522 | (441,550) | (1,143,522) |
| Office of the Executive Director | - | - | 382,175 | 932,020 | 108,403 | 142,635 | 490,578 | 1,074,655 | (490,578) | (1,074,655) |
| OGC-Disciplinary Board | - | - | 87,199 | 210,543 | 39,177 | 136,245 | 126,376 | 346,788 | (126,376) | (346,788) |
| Practice of Law Board | - | - | 40,332 | 98,855 | 197 | 16,200 | 40,528 | 115,055 | (40,528) | (115,055) |
| Practice Management Assistance | 39,349 | 62,000 | 63,746 | 152,525 | 88,391 | 95,695 | 152,137 | 248,220 | (112,788) | (186,220) |
| Professional Responsibility Program | - | - | 87,699 | 216,787 | 2,022 | 7,990 | 89,721 | 224,777 | (89,721) | (224,777) |
| Public Service Programs | 2,639 | 132,635 | 109,573 | 310,124 | (3,257) | 12,700 | 106,317 | 322,824 | (103,678) | (190,189) |
| Publication and Design Services | - | - | 50,745 | 124,205 | 4,756 | 5,000 | 55,501 | 129,205 | (55,501) | (129,205) |
| Regulatory Services FTE | | | 168,592 | 425,472 | 1,330 | 12,590 | 169,922 | 438,062 | (169,922) | (438,062) |
| Regulatory Reform | - | - | 68,528 | 167,255 | 8,828 | 57,000 | 77,356 | 224,255 | (77,356) | (224,255) |
| Sections Administration | 381,759 | 275,000 | 131,101 | 322,943 | 376 | 2,400 | 131,477 | 325,343 | 250,283 | (50,343) |
| Volunteer Engagement | - | - | 101,141 | 253,536 | 6,801 | 36,301 | 107,941 | 289,836.58 | (107,941) | (289,837) |
| Technology | - | - | 418,482 | 959,791 | - | - | 418,482 | 959,791 | (418,482) | (959,791) |
| **Subtotal General Fund** | **10,747,652** | 23,485,538 | **8,716,043** | **21,496,370** | **906,638** | 2,906,473 | **9,622,682** | 24,402,843 | **1,124,970** | **(917,304)** |
| Expenses using Facilities Reserve funds | | | | | (310) | | (310) | (744) | 310 | 744 |
| Expenses using Special Project Reserve funds | | | (68,528) | | (8,828) | | (77,356) | (224,255) | 77,356 | 224,255 |
| **Total General Fund - Net Result from Operations** | **10,747,652** | | **8,647,515** | | **897,810** | | **9,545,015** | **24,177,844** | **1,202,636** | **(692,306)** |
| **Percentage of Budget** | **46%** | | **41%** | | **31%** | | **39%** | | | |
| CLE-Seminars and Products | 635,273 | 1,491,745 | 436,907 | 1,048,807 | 78,756 | 313,153 | 515,663 | 1,361,960 | 119,610 | 129,785 |
| CLE - Deskbooks | 21,416 | 105,120 | 99,069 | 242,008 | 2,411 | 124,380 | 101,480 | 366,387 | (80,064) | (261,267) |
| Total CLE | 656,689 | 1,596,865 | 535,976 | 1,290,814 | 81,167 | 437,533 | 617,143 | 1,728,347 | 39,546 | (131,482) |
| **Percentage of Budget** | **41%** | | **42%** | | **19%** | | **36%** | | - | - |
| Expenses using Facilities Reserve funds | | | | | | | 0 | | **39,546** | **(131,482)** |
| **Total CLE Fund - Net Result from Operations** | | | **535,976** | | | | **617,143** | **1,728,347** | | |
| Total All Sections | 635,446 | 653,316 | - | - | 492,340 | 1,091,122 | 492,340 | 1,091,122 | 143,106 | (437,806) |
| Bench Bar Press-Restricted | 6,285 | - | - | - | 4,935 | - | 4,935 | 0 | 1,350 | - |
| Client Protection Fund-Restricted | 783,790 | 945,480 | 81,387 | 194,280 | 4,363 | 507,100 | 85,750 | 701,380 | 698,040 | 244,100 |
| Expenses using Facilities Reserve funds | | | | | | | - | | - | - |
| **Total CPF Fund - Net Result from Operations** | | | **81,387** | | | | **85,750** | **701,380** | **698,040** | **244,100** |
| **Totals** | **12,823,577** | **26,681,199** | **9,333,406** | **22,981,465** | **1,484,509** | **4,942,227** | **10,817,915** | **27,923,692** | **2,007,012** | **(1,242,493)** |
| **Totals Net of Use of Facilities Reserve Funds** | | | - | | (310) | | (310) | | 310 | |
| **Totals Net of Use of Special Project Reserve Funds** | | | (68,528) | | (8,828) | | (77,356) | **27,698,693** | 77,356 | **(1,017,494)** |
| | | | **9,264,878** | | **1,475,681** | | **10,740,249** | | **2,084,678** | |
| **Percentage of Budget** | **48%** | | **41%** | | **30%** | | **39%** | | | |

| 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 | 6,005,132 |
| Bench Bar Press | 1,110 | 1,110 | 2,460 |
| ***Board-Designated Funds (Non-General Fund):*** | | | |
| CLE Fund Balance | 1,233,727 | 1,102,244 | 1,273,273 |
| Section Funds | 2,164,531 | 1,726,725 | 2,307,637 |
| ***Board-Designated Funds (General Fund):*** | | | |
| Operating Reserve Fund | 2,500,000 | 2,500,000 | 2,500,000 |
| Facilities Reserve Fund | 159,925 | 159,181 | 159,615 |
| Special Projects and Innovation Fund | 616,067 | 391,813 | 538,711 |
| ***Unrestricted Funds (General Fund):*** | | | |
| Unrestricted General Fund | 6,754,154 | 6,061,848 | 7,956,790 |
| **Total General Fund Balance** | **10,030,146** | **9,112,841** | **11,155,116** |
| **Net Change in Total General Fund Balance** | | **(917,304)** | **1,124,970** |
| **Total Fund Balance** | **18,736,606** | **17,494,113** | **20,743,617** |
| **Net Change In Fund Balance** | | **(1,242,493)** | **2,007,012** |

Washington State Bar Association
Analysis of Cash Investments
As of February 28, 2026

**Checking & Savings Accounts**

**General Fund**

**Checking**

| Bank | Account | Amount |
|---|---|---|
| Wells Fargo | General | 2,822,079 |
| | Total | |

| Investments | Rate (yield) | Amount |
|---|---|---|
| Wells Fargo Money Market | 3.62% | 19,482,791 |
| UBS Financial Money Market | 3.65% | 1,187,061 |
| CDs/Treasuries | see list | 6,000,000 |
| | **General Fund Total** | **29,491,931** |

**Client Protection Fund**

**Checking**

| Bank | Amount |
|---|---|
| Wells Fargo | 546,431 |

| Investments | Rate (yield) | Amount |
|---|---|---|
| Wells Fargo Money Market | 3.62% | 4,783,834 |
| CDs/Treasuries | see list | 750,000 |
| | **Client Protection Fund Total** | **6,080,265** |
| | **Grand Total Cash & Investments** | **35,572,196** |

Washington State Bar Association
Analysis of Cash Investments
As of February 28, 2026

**General Fund**

| Bank | Yield | Term Months | Trade Date | Settle Date | Maturity Date | Amount |
|---|---|---|---|---|---|---|
| Norway Savings Bank CD | 4.25% | 9 | 5/28/2025 | 6/2/2025 | 3/2/2026 | 250,000.00 |
| Old National Bank CD | 4.25% | 9 | 5/28/2025 | 5/29/2025 | 3/2/2026 | 250,000.00 |
| Wells Fargo CD | 4.25% | 12 | 2/24/2025 | 3/5/2025 | 3/5/2026 | 250,000.00 |
| Southstate Bank NA CD | 4.40% | 10 | 6/12/2025 | 6/18/2025 | 4/20/2026 | 250,000.00 |
| Israel Discount k of NY CD | 4.00% | 12 | 4/22/2025 | 4/28/2025 | 4/28/2026 | 250,000.00 |
| Northern Bank & Trust MA CD | 4.20% | 9 | 7/28/2025 | 7/30/2025 | 4/30/2026 | 250,000.00 |
| Citizens N/B Bluffton CD | 4.10% | 10 | 7/28/2025 | 7/31/2025 | 5/29/2026 | 250,000.00 |
| Merrick Bank CD | 4.30% | 12 | 6/12/2025 | 6/20/2025 | 6/18/2026 | 250,000.00 |
| Simmons Bank/Pine Bluff CD | 4.20% | 12 | 6/12/2025 | 6/20/2025 | 6/18/2026 | 250,000.00 |
| Goldman Sachs Bank CD | 3.60% | 6 | 12/30/2025 | 1/6/2026 | 7/6/2026 | 250,000.00 |
| Bank of America CD | 3.60% | 6 | 12/30/2025 | 1/7/2026 | 7/7/2026 | 250,000.00 |
| BCB Community Bank NY CD | 4.05% | 12 | 7/7/2025 | 7/18/2025 | 7/17/2026 | 250,000.00 |
| Bank Hapoalim BM CD | 4.15% | 12 | 7/28/2025 | 7/31/2025 | 7/29/2026 | 250,000.00 |
| Bridgewater BK CD | 3.70% | 6 | 1/29/2026 | 2/6/2026 | 8/6/2026 | 250,000.00 |
| Industrial & Com BK CD | 3.70% | 6 | 1/29/2026 | 2/6/2026 | 8/6/2026 | 250,000.00 |
| Morgan Stanley PVT Bank CD | 4.05% | 12 | 8/6/2025 | 8/13/2025 | 8/13/2026 | 250,000.00 |
| Zions Bancorp NA CD | 3.70% | 9 | 1/29/2026 | 2/4/2026 | 11/4/2026 | 250,000.00 |
| Cross River Bank CD | 3.70% | 9 | 1/29/2026 | 2/6/2026 | 11/6/2026 | 250,000.00 |
| JP Morgan Chase Bank CD | 3.60% | 12 | 12/30/2025 | 1/7/2026 | 1/7/2027 | 250,000.00 |
| Bank of Baroda CD | 3.70% | 12 | 1/23/2026 | 1/28/2026 | 1/28/2027 | 250,000.00 |
| Ally Bank/UT CD | 3.60% | 12 | 1/23/2026 | 1/29/2026 | 1/29/2027 | 250,000.00 |
| BMW Bank North America CD | 3.65% | 12 | 1/23/2026 | 1/30/2026 | 1/29/2027 | 250,000.00 |
| CAPE & Coast Bank CD | 3.65% | 12 | 1/23/2026 | 1/30/2026 | 1/29/2027 | 250,000.00 |
| Lake City Bank Warsaw CD | 3.80% | 12 | 2/10/2026 | 2/18/2026 | 2/18/2027 | 250,000.00 |
| | | | | | **Total** | **6,000,000.00** |

**Client Fund Protection Fund**

| Bank | Yield | Term Months | Trade Date | Settle Date | Maturity Date | Amount |
|---|---|---|---|---|---|---|
| Commerce Bank Geneva MN CD | 4.30% | 9 | 6/12/2025 | 6/18/2025 | 3/18/2026 | 250,000.00 |
| SOFI Bank NA Corp CD | 3.70% | 6 | 1/23/2026 | 2/4/2026 | 8/4/2026 | 250,000.00 |
| SAFRA National Bank CD | 3.65% | 11 | 1/23/2026 | 1/29/2026 | 12/29/2026 | 250,000.00 |
| | | | | | **Total** | **750,000.00** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | 1,922,555 | 7,326,078 | 10,326,188 | 42% | (29,033) |
| **TOTAL REVENUE:** | **17,652,266** | **1,922,555** | **7,326,078** | **10,326,188** | **42%** | **(29,033)** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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% | (3,958) |
| BAR EXAM FEES | 1,395,000 | 220,310 | 868,730 | 526,270 | 62% | 287,480 |
| RULE 9/LEGAL INTERN FEES | 13,000 | 450 | 1,800 | 11,200 | 14% | (3,617) |
| SPECIAL ADMISSIONS | 61,940 | 2,535 | 16,930 | 45,010 | 27% | (8,878) |
| **TOTAL REVENUE:** | **1,479,440** | **223,295** | **887,460** | **591,980** | **60%** | **271,027** |
| **DIRECT EXPENSES:** | | | | | | |
| POSTAGE | 2,900 | 257 | 1,822 | 1,078 | 63% | (614) |
| STAFF TRAVEL/PARKING | 24,000 | 8,531 | 8,531 | 15,469 | 36% | 1,469 |
| STAFF MEMBERSHIP DUES | 495 | - | 245 | 250 | 49% | (39) |
| SUPPLIES | 2,500 | 79 | 1,425 | 1,075 | 57% | (383) |
| FACILITY, PARKING, FOOD | 150,985 | 46,969 | 46,969 | 104,016 | 31% | 15,941 |
| EXAM GRADING | 43,750 | 12,000 | 21,750 | 22,000 | 50% | (3,521) |
| UBE EXMINATIONS | 46,200 | - | - | 46,200 | 0% | 19,250 |
| BOARD OF BAR EXAMINERS | 45,000 | 609 | 609 | 44,391 | 1% | 18,141 |
| BAR EXAM PROCTORS | 10,000 | 776 | 776 | 9,224 | 8% | 3,391 |
| DISABILITY ACCOMMODATIONS | 75,000 | 103 | 2,378 | 72,622 | 3% | 28,872 |
| CHARACTER & FITNESS INVESTIGATIONS | 1,500 | - | - | 1,500 | 0% | 625 |
| LAW SCHOOL VISITS | 1,500 | 23 | 23 | 1,477 | 2% | 602 |
| SOFTWARE HOSTING | 45,000 | 4,145 | 21,905 | 23,095 | 49% | (3,155) |
| STAFF CONFERENCE & TRAINING | 11,000 | - | 5,354 | 5,646 | 49% | (770) |
| **TOTAL DIRECT EXPENSES:** | **459,830** | **73,493** | **111,787** | **348,043** | **24%** | **79,809** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (7.45 FTE) ** | 635,395 | 53,168 | 247,642 | 387,753 | 39% | 17,106 |
| BENEFITS EXPENSE | 198,059 | 17,735 | 83,373 | 114,685 | 42% | (849) |
| OTHER INDIRECT EXPENSE | 256,539 | 17,086 | 92,276 | 164,263 | 36% | 14,616 |
| **TOTAL INDIRECT EXPENSES:** | **1,089,992** | **87,989** | **423,291** | **666,702** | **39%** | **30,873** |
| **TOTAL ALL EXPENSES:** | **1,549,822** | **161,482** | **535,078** | **1,014,745** | **35%** | **110,682** |
| **NET INCOME (LOSS):** | **(70,382)** | **61,813** | **352,382** | **(422,765)** | **-501%** | **381,708** |

**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 February 01, 2026 to February 28, 2026

**42% 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% | 2,610 |
| **TOTAL DIRECT EXPENSES:** | **6,600** | **-** | **140** | **6,460** | **2%** | **2,610** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.41 FTE) | 216,525 | 18,088 | 92,182 | 124,343 | 43% | (1,963) |
| BENEFITS EXPENSE | 50,531 | 4,489 | 21,685 | 28,846 | 43% | (630) |
| OTHER INDIRECT EXPENSE | 48,553 | 3,241 | 17,505 | 31,048 | 36% | 2,725 |
| **TOTAL INDIRECT EXPENSES:** | **315,609** | **25,818** | **131,372** | **184,237** | **42%** | **132** |
| **TOTAL ALL EXPENSES:** | **322,209** | **25,818** | **131,512** | **190,697** | **41%** | **2,741** |
| **NET INCOME (LOSS):** | **(322,209)** | **(25,818)** | **(131,512)** | **(190,697)** | **41%** | **2,741** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% OF YEAR COMPLETE**

## ACCESS TO JUSTICE

| | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET | YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE) |
|---|---|---|---|---|---|---|
| **REVENUE:** | | | | | | |
| **TOTAL REVENUE:** | - | - | - | - | | - |
| **DIRECT EXPENSES:** | | | | | | |
| ATJ BOARD RETREAT | 6,000 | - | - | 6,000 | 0% | 2,500 |
| LEADERSHIP TRAINING | 10,000 | - | 3,450 | 6,550 | 34% | 717 |
| ATJ BOARD EXPENSE ** | 55,400 | 175 | 2,110 | 53,290 | 4% | 20,973 |
| STAFF TRAVEL/PARKING | 2,800 | - | 239 | 2,561 | 9% | 928 |
| STAFF CONFERENCE & TRAINING | 4,400 | - | 3,662 | 738 | 83% | (1,829) |
| PUBLIC DEFENSE | 4,000 | - | 4,106 | (106) | 103% | (2,439) |
| RECEPTION/FORUM EXPENSE | 30,000 | 100 | 100 | 29,900 | 0% | 12,400 |
| **TOTAL DIRECT EXPENSES:** | **112,600** | **275** | **13,667** | **98,933** | **12%** | **33,250** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.61 FTE) ** | 152,635 | 10,827 | 59,923 | 92,713 | 39% | 3,675 |
| BENEFITS EXPENSE | 45,272 | 3,736 | 18,968 | 26,305 | 42% | (104) |
| OTHER INDIRECT EXPENSE | 55,440 | 3,695 | 20,126 | 35,314 | 36% | 2,974 |
| **TOTAL INDIRECT EXPENSES:** | **253,348** | **18,258** | **99,017** | **154,331** | **39%** | **6,545** |
| **TOTAL ALL EXPENSES:** | **365,948** | **18,533** | **112,683** | **253,265** | **31%** | **39,795** |
| **NET INCOME (LOSS):** | **(365,948)** | **(18,533)** | **(112,683)** | **(253,265)** | **31%** | **39,795** |

**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 February 01, 2026 to February 28, 2026

**42% 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 | - | 88 | 4,935 | (4,935) | | (4,935) |
| **TOTAL DIRECT EXPENSES:** | **-** | **88** | **4,935** | **(4,935)** | | **(4,935)** |
| **NET INCOME (LOSS):** | **-** | **(88)** | **1,350** | **(1,350)** | | **1,350** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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% | (833) |
| BNEWS DISPLAY ADVERTISING | 405,000 | 50,000 | 204,289 | 200,711 | 50% | 35,539 |
| BNEWS SUBSCRIPT/SINGLE ISSUES | 100 | 72 | 104 | (4) | 104% | 63 |
| BNEWS CLASSIFIED ADVERTISING | 2,500 | 428 | 2,805 | (305) | 112% | 1,763 |
| JOB TARGET ADVERSTISING | 120,000 | 8,725 | 47,990 | 72,010 | 40% | (2,010) |
| **TOTAL REVENUE:** | **529,600** | **59,225** | **255,188** | **274,412** | **48%** | **34,521** |
| **DIRECT EXPENSES:** | | | | | | |
| POSTAGE | 135,000 | 16,244 | 66,222 | 68,778 | 49% | (9,972) |
| PRINTING, COPYING & MAILING | 242,000 | 26,286 | 104,229 | 137,771 | 43% | (3,396) |
| DIGITAL/ONLINE DEVELOPMENT | 2,000 | - | - | 2,000 | 0% | 833 |
| GRAPHICS/ARTWORK | 1,000 | - | - | 1,000 | 0% | 417 |
| EDITORIAL ADVIS COMMITTEE EXP | 300 | - | - | 300 | 0% | 125 |
| STAFF CONFERENCE & TRAINING | 2,200 | - | 999 | 1,201 | 45% | (82) |
| STAFF MEMBERSHIP DUES | 220 | - | - | 220 | 0% | 92 |
| SUBSCRIPTIONS | 225 | - | - | 225 | 0% | 94 |
| **TOTAL DIRECT EXPENSES:** | **382,945** | **42,530** | **171,450** | **211,495** | **45%** | **(11,890)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.13 FTE) | 199,151 | 17,312 | 84,241 | 114,910 | 42% | (1,261) |
| BENEFITS EXPENSE | 59,029 | 5,378 | 25,478 | 33,551 | 43% | (882) |
| OTHER INDIRECT EXPENSE | 73,346 | 4,896 | 26,442 | 46,904 | 36% | 4,119 |
| **TOTAL INDIRECT EXPENSES:** | **331,526** | **27,586** | **136,160** | **195,366** | **41%** | **1,976** |
| **TOTAL ALL EXPENSES:** | **714,471** | **70,116** | **307,610** | **406,861** | **43%** | **(9,914)** |
| **NET INCOME (LOSS):** | **(184,871)** | **(10,891)** | **(52,422)** | **(132,449)** | **28%** | **24,607** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | 714 | 13,529 | 161,471 | 8% | 59,388 |
| BOG COMMITTEES' EXPENSES ** | 11,200 | 279 | 1,332 | 9,868 | 12% | 3,334 |
| BOG RETREAT | 40,000 | - | 31,365 | 8,635 | 78% | (14,698) |
| BOG CONFERENCE ATTENDANCE | 56,500 | 8,981 | 10,630 | 45,870 | 19% | 12,912 |
| BOG TRAVEL & OUTREACH ** | 70,000 | 3,140 | 37,189 | 32,812 | 53% | (8,022) |
| LEADERSHIP TRAINING | 15,000 | - | - | 15,000 | 0% | 6,250 |
| BOG ELECTIONS ** | 26,900 | - | - | 26,900 | 0% | 11,208 |
| PRESIDENT'S DINNER | 12,000 | - | - | 12,000 | 0% | 5,000 |
| NEW GOVERNOR ORIENTATION | 7,000 | - | - | 7,000 | 0% | 2,917 |
| PRESIDENT'S PHOTO | 3,300 | - | - | 3,300 | 0% | 1,375 |
| SUPPLIES | 765 | - | 200 | 565 | 26% | 119 |
| **TOTAL DIRECT EXPENSES:** | **417,665** | **13,114** | **94,244** | **323,421** | **23%** | **79,783** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.73 FTE) | 135,043 | 11,318 | 56,533 | 78,510 | 42% | (265) |
| BENEFITS EXPENSE | 44,269 | 3,964 | 19,229 | 25,040 | 43% | (783) |
| OTHER INDIRECT EXPENSE | 59,572 | 3,956 | 21,366 | 38,206 | 36% | 3,456 |
| **TOTAL INDIRECT EXPENSES:** | **238,885** | **19,239** | **97,128** | **141,757** | **41%** | **2,408** |
| **TOTAL ALL EXPENSES:** | **656,550** | **32,353** | **191,372** | **465,178** | **29%** | **82,191** |
| **NET INCOME (LOSS):** | **(656,550)** | **(32,353)** | **(191,372)** | **(465,178)** | **29%** | **82,191** |

**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 February 01, 2026 to February 28, 2026

**42% 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 | 20,926 | 28,343 | 42% | (398) |
| BENEFITS EXPENSE | 14,930 | 1,330 | 6,511 | 8,419 | 44% | (290) |
| OTHER INDIRECT EXPENSE | 18,939 | 1,265 | 6,833 | 12,107 | 36% | 1,059 |
| TOTAL INDIRECT EXPENSES: | **83,138** | **6,692** | **34,270** | **48,868** | **41%** | **371** |
| NET INCOME (LOSS): | **(83,138)** | **(6,692)** | **(34,270)** | **(48,868)** | **41%** | **371** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | - | 3,806 | 8,194 | 32% | 1,194 |
| COURT REPORTERS | 11,050 | - | 4,236 | 6,814 | 38% | 368 |
| **TOTAL DIRECT EXPENSES:** | **23,050** | **-** | **8,042** | **15,008** | **35%** | **1,562** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.85 FTE) | 103,891 | 8,600 | 44,200 | 59,692 | 43% | (912) |
| BENEFITS EXPENSE | 26,820 | 2,372 | 11,589 | 15,230 | 43% | (415) |
| OTHER INDIRECT EXPENSE | 29,270 | 1,944 | 10,499 | 18,770 | 36% | 1,697 |
| TOTAL INDIRECT EXPENSES: | **159,981** | **12,916** | **66,288** | **93,693** | **41%** | **370** |
| **TOTAL ALL EXPENSES:** | **183,031** | **12,916** | **74,330** | **108,701** | **41%** | **1,933** |
| **NET INCOME (LOSS):** | **(183,031)** | **(12,916)** | **(74,330)** | **(108,701)** | **41%** | **1,933** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | 18,565 | 140,235 | 590,300 | 19% | (164,154) |
| SEMINAR REVENUE-OTHER | 32,500 | - | 16,000 | 16,500 | 49% | 2,458 |
| SEMINAR SPLITS W/ CLE | (150,000) | - | - | (150,000) | 0% | 62,500 |
| SHIPPING & HANDLING | 210 | - | 27 | 183 | 13% | (61) |
| COURSEBOOK SALES | 3,500 | - | 255 | 3,245 | 7% | (1,203) |
| DIGITAL VIDEO SALES | 875,000 | 25,946 | 478,756 | 396,244 | 55% | 114,172 |
| **TOTAL REVENUE:** | **1,491,745** | **44,511** | **635,273** | **856,472** | **43%** | **13,713** |
| **DIRECT EXPENSES:** | | | | | | |
| COURSEBOOK PRODUCTION | 150 | - | - | 150 | 0% | 63 |
| ONLINE EXPENSES | 54,000 | 6 | 17,845 | 36,155 | 33% | 4,655 |
| ACCREDITATION FEES | 2,500 | (48) | 2,100 | 400 | 84% | (1,058) |
| FACILITIES | 175,000 | 2,000 | 45,907 | 129,093 | 26% | 27,010 |
| DISABILITY ACCOMMODATIONS | 7,000 | 2,063 | 2,211 | 4,789 | 32% | 705 |
| SPEAKERS & PROGRAM DEVELOP | 45,700 | - | 6,466 | 39,234 | 14% | 12,576 |
| HONORARIA | 3,000 | - | - | 3,000 | 0% | 1,250 |
| CLE SEMINAR COMMITTEE | 200 | - | - | 200 | 0% | 83 |
| STAFF TRAVEL/PARKING | 16,500 | - | 2,721 | 13,779 | 16% | 4,154 |
| STAFF CONFERENCE & TRAINING | 3,700 | - | - | 3,700 | 0% | 1,542 |
| STAFF MEMBERSHIP DUES | 1,500 | 1,091 | 1,091 | 409 | 73% | (466) |
| SUBSCRIPTIONS | 1,300 | - | - | 1,300 | 0% | 542 |
| SUPPLIES | 1,000 | - | 41 | 959 | 4% | 376 |
| COST OF SALES - COURSEBOOKS | 300 | - | 25 | 275 | 8% | 100 |
| POSTAGE & DELIVERY-COURSEBOOKS | 200 | - | 22 | 178 | 11% | 61 |
| IT EXPENSE DUE TO GF | 1,103 | 72 | 326 | 777 | 30% | 133 |
| **TOTAL DIRECT EXPENSES:** | **313,153** | **5,182** | **78,756** | **234,397** | **25%** | **51,725** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (7.95 FTE) | 614,468 | 52,595 | 262,350 | 352,117 | 43% | (6,322) |
| BENEFITS EXPENSE | 202,492 | 18,331 | 88,533 | 113,959 | 44% | (4,161) |
| OTHER INDIRECT EXPENSE | 231,847 | 15,507 | 86,024 | 145,823 | 37% | 10,579 |
| **TOTAL INDIRECT EXPENSES:** | **1,048,807** | **86,433** | **436,907** | **611,900** | **42%** | **96** |
| **TOTAL ALL EXPENSES:** | **1,361,960** | **91,615** | **515,663** | **846,297** | **38%** | **51,821** |
| **NET INCOME (LOSS):** | **129,785** | **(47,104)** | **119,610** | **10,175** | **92%** | **65,533** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | 965 | 2,731 | 7,269 | 27% | (1,436) |
| CPF MEMBER ASSESSMENTS | 735,480 | 83,080 | 693,370 | 42,110 | 94% | 386,920 |
| INTEREST INCOME | 200,000 | 15,587 | 83,189 | 116,811 | 42% | (144) |
| **TOTAL REVENUE:** | **945,480** | **99,632** | **783,790** | **161,690** | **83%** | **389,840** |
| **DIRECT EXPENSES:** | | | | | | |
| BANK FEES | 500 | 18 | (69) | 569 | -14% | 278 |
| GIFTS TO INJURED CLIENTS | 500,000 | 1,200 | 3,700 | 496,300 | 1% | 204,633 |
| CPF BOARD EXPENSES | 2,000 | - | 732 | 1,268 | 37% | 101 |
| STAFF CONFERENCE & TRAINING | 4,400 | - | - | 4,400 | 0% | 1,833 |
| STAFF MEMBERSHIP DUES | 200 | - | - | 200 | 0% | 83 |
| **TOTAL DIRECT EXPENSES:** | **507,100** | **1,218** | **4,363** | **502,737** | **1%** | **206,929** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.23 FTE) | 117,501 | 9,768 | 51,351 | 66,149 | 44% | (2,393) |
| BENEFITS EXPENSE | 34,425 | 3,062 | 14,808 | 19,616 | 43% | (465) |
| OTHER INDIRECT EXPENSE | 42,355 | 2,819 | 15,228 | 27,127 | 36% | 2,420 |
| **TOTAL INDIRECT EXPENSES:** | **194,280** | **15,650** | **81,387** | **112,893** | **42%** | **(437)** |
| **TOTAL ALL EXPENSES:** | **701,380** | **16,868** | **85,750** | **615,630** | **12%** | **206,491** |
| **NET INCOME (LOSS):** | **244,100** | **82,764** | **698,040** | **(453,940)** | **286%** | **596,331** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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% | (417) |
| WSBA LOGO MERCHANDISE SALES | 2,000 | - | - | 2,000 | 0% | (833) |
| **TOTAL REVENUE:** | **3,000** | **-** | **-** | **3,000** | **0%** | **(1,250)** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 5,895 | 198 | 990 | 4,905 | 17% | 1,466 |
| STAFF MEMBERSHIP DUES | 1,800 | - | 537 | 1,263 | 30% | 213 |
| SUBSCRIPTIONS | 4,520 | 263 | 930 | 3,590 | 21% | 953 |
| APEX | 52,500 | - | - | 52,500 | 0% | 21,875 |
| BAR LEADERS SUMMIT | 35,000 | - | - | 35,000 | 0% | 14,583 |
| 50 YEAR MEMBER TRIBUTE LUNCH | 38,000 | - | - | 38,000 | 0% | 15,833 |
| BAR OUTREACH | 15,000 | 3,812 | 13,359 | 1,641 | 89% | (7,109) |
| COMMUNICATIONS OUTREACH | 15,000 | 238 | 2,112 | 12,888 | 14% | 4,138 |
| STAFF CONFERENCE & TRAINING | 11,300 | - | 7,791 | 3,510 | 69% | (3,082) |
| AMBASSADOR TRAINING & TOWN HALLS | 10,000 | - | - | 10,000 | 0% | 4,167 |
| **TOTAL DIRECT EXPENSES:** | **189,015** | **4,511** | **25,719** | **163,296** | **14%** | **53,037** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (5.39 FTE) | 417,995 | 34,815 | 172,314 | 245,682 | 41% | 1,851 |
| BENEFITS EXPENSE | 137,502 | 12,304 | 59,337 | 78,165 | 43% | (2,044) |
| OTHER INDIRECT EXPENSE | 185,603 | 12,355 | 66,722 | 118,881 | 36% | 10,612 |
| **TOTAL INDIRECT EXPENSES:** | **741,101** | **59,475** | **298,373** | **442,728** | **40%** | **10,419** |
| **TOTAL ALL EXPENSES:** | **930,116** | **63,986** | **324,091** | **606,024** | **35%** | **63,457** |
| **NET INCOME (LOSS):** | **(927,116)** | **(63,986)** | **(324,091)** | **(603,024)** | **35%** | **62,207** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | 77,916 | 105,277 | 43% | (1,585) |
| BENEFITS EXPENSE | 39,830 | 3,536 | 17,053 | 22,777 | 43% | (457) |
| OTHER INDIRECT EXPENSE | 34,435 | 2,301 | 12,429 | 22,005 | 36% | 1,918 |
| TOTAL INDIRECT EXPENSES: | **257,458** | **21,103** | **107,398** | **150,060** | **42%** | **(124)** |
| NET INCOME (LOSS): | **(257,458)** | **(21,103)** | **(107,398)** | **(150,060)** | **42%** | **(124)** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | - | - | 5,120 | 0% | (2,133) |
| LEXIS/NEXIS ROYALTIES | 75,000 | 11,538 | 11,538 | 63,462 | 15% | (19,712) |
| CASEMAKER ROYALTIES | 25,000 | 9,878 | 9,878 | 15,122 | 40% | (538) |
| **TOTAL REVENUE:** | **105,120** | **21,416** | **21,416** | **83,704** | **20%** | **(22,384)** |
| **DIRECT EXPENSES:** | | | | | | |
| COST OF SALES - DESKBOOKS | 2,800 | - | 65 | 2,735 | 2% | 1,102 |
| DESKBOOK ROYALTIES | - | - | 193 | (193) | | (193) |
| STAFF CONFERENCES & TRAINING | 2,200 | 1,914 | 1,914 | 286 | 87% | (997) |
| POSTAGE & DELIVERY-DESKBOOKS | 300 | - | 21 | 279 | 7% | 104 |
| OBSOLETE INVENTORY | 118,700 | - | - | 118,700 | 0% | 49,458 |
| STAFF MEMBERSHIP DUES | 330 | 218 | 218 | 112 | 66% | (81) |
| SUBSCRIPTIONS | 50 | - | - | 50 | 0% | 21 |
| **TOTAL DIRECT EXPENSES:** | **124,380** | **2,132** | **2,411** | **121,968** | **2%** | **49,413** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.75 FTE) | 145,047 | 12,165 | 60,274 | 84,773 | 42% | 162 |
| BENEFITS EXPENSE | 45,925 | 4,120 | 19,815 | 26,111 | 43% | (679) |
| OTHER INDIRECT EXPENSE | 51,036 | 3,421 | 18,980 | 32,055 | 37% | 2,284 |
| **TOTAL INDIRECT EXPENSES:** | **242,008** | **19,706** | **99,069** | **142,939** | **41%** | **1,768** |
| **TOTAL ALL EXPENSES:** | **366,387** | **21,838** | **101,480** | **264,907** | **28%** | **51,181** |
| **NET INCOME (LOSS):** | **(261,267)** | **(422)** | **(80,064)** | **(181,203)** | **31%** | **28,797** |

# Washington State Bar Association

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**42% 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 | 43 | 829 | 171 | 83% | 412 |
| RECOVERY OF DISCIPLINE COSTS | 65,000 | 14,561 | 33,544 | 31,456 | 52% | 6,461 |
| DISCIPLINE HISTORY SUMMARY | 19,000 | 2,010 | 10,020 | 8,980 | 53% | 2,103 |
| **TOTAL REVENUE:** | **85,000** | **16,614** | **44,393** | **40,607** | **52%** | **8,976** |
| **DIRECT EXPENSES:** | | | | | | |
| PUBLICATIONS PRODUCTION | 350 | - | - | 350 | 0% | 146 |
| STAFF TRAVEL/PARKING | 15,000 | 1,102 | 6,463 | 8,537 | 43% | (213) |
| STAFF MEMBERSHIP DUES | 7,659 | - | 7,156 | 503 | 93% | (3,965) |
| TELEPHONE | 3,000 | 199 | 992 | 2,008 | 33% | 258 |
| COURT REPORTERS | 66,200 | 4,970 | 21,580 | 44,620 | 33% | 6,003 |
| OUTSIDE COUNSEL/AIC | 500 | - | - | 500 | 0% | 208 |
| LITIGATION EXPENSES | 30,000 | 1,327 | 5,458 | 24,542 | 18% | 7,042 |
| DISABILITY EXPENSES | 15,000 | - | 4,696 | 10,304 | 31% | 1,554 |
| TRANSLATION SERVICES | 10,000 | 1,478 | 6,943 | 3,057 | 69% | (2,777) |
| STAFF CONFERENCE & TRAINING | 37,800 | 15,652 | 20,153 | 17,647 | 53% | (4,403) |
| **TOTAL DIRECT EXPENSES:** | **185,509** | **24,727** | **73,441** | **112,068** | **40%** | **3,854** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (39.00 FTE) | 4,131,360 | 334,518 | 1,639,186 | 2,492,175 | 40% | 82,214 |
| BENEFITS EXPENSE | 1,139,859 | 100,581 | 483,665 | 656,195 | 42% | (8,723) |
| OTHER INDIRECT EXPENSE | 1,342,955 | 89,373 | 482,652 | 860,303 | 36% | 76,913 |
| **TOTAL INDIRECT EXPENSES:** | **6,614,175** | **524,472** | **2,605,503** | **4,008,673** | **39%** | **150,404** |
| **TOTAL ALL EXPENSES:** | **6,799,684** | **549,199** | **2,678,944** | **4,120,740** | **39%** | **154,258** |
| **NET INCOME (LOSS):** | **(6,714,684)** | **(532,585)** | **(2,634,551)** | **(4,080,133)** | **39%** | **163,234** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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% | 78,750 |
| **TOTAL REVENUE:** | **135,000** | **-** | **135,000** | **-** | **100%** | **78,750** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 3,700 | 40 | 288 | 3,412 | 8% | 1,254 |
| STAFF MEMBERSHIP DUES | 775 | 205 | 380 | 395 | 49% | (57) |
| DEI COUNCIL | 7,600 | - | 1,917 | 5,683 | 25% | 1,250 |
| DIVERSITY EVENTS & PROJECTS | 37,100 | 140 | 4,941 | 32,159 | 13% | 10,517 |
| STAFF EQUITY LEADERSHIP LAB | 6,000 | - | 1,939 | 4,061 | 32% | 561 |
| STAFF CONFERENCE & TRAINING | 4,400 | - | - | 4,400 | 0% | 1,833 |
| CONSULTING SERVICES | 3,000 | - | - | 3,000 | 0% | 1,250 |
| **TOTAL DIRECT EXPENSE:** | **62,575** | **385** | **9,465** | **53,110** | **15%** | **16,608** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.24 FTE) ** | 198,124 | 14,283 | 69,760 | 128,363 | 35% | 12,791 |
| BENEFITS EXPENSE | 66,814 | 5,080 | 25,430 | 41,383 | 38% | 2,409 |
| OTHER INDIRECT EXPENSE | 77,134 | 5,125 | 30,410 | 46,724 | 39% | 1,729 |
| **TOTAL INDIRECT EXPENSES:** | **342,071** | **24,488** | **125,601** | **216,471** | **37%** | **16,929** |
| **TOTAL ALL EXPENSES:** | **404,646** | **24,873** | **135,065** | **269,581** | **33%** | **33,537** |
| **NET INCOME (LOSS):** | **(269,646)** | **(24,873)** | **(65)** | **(269,581)** | **0%** | **112,287** |

**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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**42% 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 | 2,000 | 8,000 | 20,000 | 29% | (3,667) |
| ANNUAL FEES | 47,500 | - | - | 47,500 | 0% | (19,792) |
| **TOTAL REVENUE:** | **75,500** | **2,000** | **8,000** | **67,500** | **11%** | **(23,458)** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF CONFERENCE & TRAINING | 4,400 | - | 1,551 | 2,849 | 35% | 283 |
| INVESTIGATION | 9,600 | - | - | 9,600 | 0% | 4,000 |
| OUTREACH & COMMUNICATION | 10,000 | - | - | 10,000 | 0% | 4,167 |
| SOFTWARE HOSTING | 3,973 | 74 | 389 | 3,583 | 10% | 1,266 |
| **TOTAL DIRECT EXPENSES:** | **27,973** | **74** | **1,940** | **26,033** | **7%** | **9,715** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.55 FTE) ** | 77,471 | 6,446 | 32,551 | 44,919 | 42% | (272) |
| BENEFITS EXPENSE | 18,673 | 1,664 | 8,063 | 10,610 | 43% | (283) |
| OTHER INDIRECT EXPENSE | 18,939 | 1,265 | 6,833 | 12,107 | 36% | 1,059 |
| **TOTAL INDIRECT EXPENSES:** | **115,083** | **9,375** | **47,447** | **67,636** | **41%** | **504** |
| **TOTAL ALL EXPENSES:** | **143,055** | **9,449** | **49,387** | **93,668** | **35%** | **10,219** |
| **NET INCOME (LOSS):** | **(67,555)** | **(7,449)** | **(41,387)** | **(26,168)** | **61%** | **(13,239)** |

**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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**42% 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 | 1,000 | 2,000 | 7,000 | 22% | (1,750) |
| ROYALTIES | 62,000 | 12,869 | 39,349 | 22,651 | 63% | 13,516 |
| **TOTAL REVENUE:** | **71,000** | **13,869** | **41,349** | **29,651** | **58%** | **11,766** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF MEMBERSHIP DUES | 1,385 | - | 890 | 495 | 64% | (313) |
| MEMBER WELLNESS COUNCIL | 4,500 | - | - | 4,500 | 0% | 1,875 |
| LEGAL TECH TASK FORCE | 3,500 | - | - | 3,500 | 0% | 1,458 |
| STAFF TRAVEL/PARKING | 7,700 | - | 2,064 | 5,636 | 27% | 1,145 |
| STAFF CONFERENCE & TRAINING | 10,300 | - | 580 | 9,720 | 6% | 3,712 |
| SUBSCRIPTIONS | 1,400 | 111 | 552 | 848 | 39% | 31 |
| CPE COMMITTEE | 1,000 | - | - | 1,000 | 0% | 417 |
| VLEX FASTCASE | 87,000 | - | 87,812 | (812) | 101% | (51,562) |
| **TOTAL DIRECT EXPENSES:** | **116,785** | **111** | **91,897** | **24,888** | **79%** | **(43,237)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (3.51 FTE) | 385,777 | 34,510 | 163,773 | 222,003 | 42% | (3,033) |
| BENEFITS EXPENSE | 105,599 | 9,681 | 45,379 | 60,220 | 43% | (1,379) |
| OTHER INDIRECT EXPENSE | 120,866 | 8,041 | 43,426 | 77,440 | 36% | 6,935 |
| **TOTAL INDIRECT EXPENSES:** | **612,242** | **52,232** | **252,578** | **359,663** | **41%** | **2,522** |
| **TOTAL ALL EXPENSES:** | **729,027** | **52,343** | **344,476** | **384,551** | **47%** | **(40,715)** |
| **NET INCOME (LOSS):** | **(658,027)** | **(38,474)** | **(303,126)** | **(354,900)** | **46%** | **(28,949)** |

# Washington State Bar Association

Statement of Activities

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**42% 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 | 990 | 1,386 | 42% | - |
| STAFF MEMBERSHIP DUES | 189 | - | - | 189 | 0% | 79 |
| **TOTAL DIRECT EXPENSES:** | **2,565** | **198** | **990** | **1,575** | **39%** | **79** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (5.78 FTE) | 406,195 | 36,153 | 180,756 | 225,439 | 44% | (11,508) |
| BENEFITS EXPENSE | 141,474 | 13,018 | 63,096 | 78,378 | 45% | (4,149) |
| OTHER INDIRECT EXPENSE | 199,033 | 13,235 | 71,472 | 127,561 | 36% | 11,459 |
| **TOTAL INDIRECT EXPENSES:** | **746,702** | **62,406** | **315,323** | **431,378** | **42%** | **(4,198)** |
| **TOTAL ALL EXPENSES:** | **749,267** | **62,604** | **316,313** | **432,953** | **42%** | **(4,119)** |
| **NET INCOME (LOSS):** | **(749,267)** | **(62,604)** | **(316,313)** | **(432,953)** | **42%** | **(4,119)** |

# Washington State Bar Association

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**42% 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 | 58,907 | 249,345 | 350,655 | 42% | (655) |
| **TOTAL REVENUE:** | **600,000** | **58,907** | **249,345** | **350,655** | **42%** | **(655)** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 3,750 | 772 | 2,424 | 1,326 | 65% | (862) |
| STAFF CONFERENCE & TRAINING | 500 | - | - | 500 | 0% | 208 |
| STAFF MEMBERSHIP DUES | 670 | - | 230 | 440 | 34% | 49 |
| **TOTAL DIRECT EXPENSES:** | **4,920** | **772** | **2,654** | **2,266** | **54%** | **(604)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (6.92 FTE) | 777,786 | 70,932 | 327,741 | 450,044 | 42% | (3,664) |
| BENEFITS EXPENSE | 209,178 | 19,309 | 91,629 | 117,549 | 44% | (4,471) |
| OTHER INDIRECT EXPENSE | 238,288 | 15,858 | 85,637 | 152,651 | 36% | 13,650 |
| **TOTAL INDIRECT EXPENSES:** | **1,225,253** | **106,099** | **505,008** | **720,245** | **41%** | **5,514** |
| **TOTAL ALL EXPENSES:** | **1,230,173** | **106,871** | **507,662** | **722,511** | **41%** | **4,910** |
| **NET INCOME (LOSS):** | **(630,173)** | **(47,964)** | **(258,317)** | **(371,856)** | **41%** | **4,255** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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% | (1,954) |
| PRINTING & COPYING | 1,000 | - | - | 1,000 | 0% | 417 |
| STAFF TRAVEL/PARKING | 4,000 | - | 21 | 3,979 | 1% | 1,646 |
| SUPPLIES | 2,000 | 11 | 11 | 1,989 | 1% | 822 |
| BOARD OF TRUSTEES | 3,600 | - | 75 | 3,525 | 2% | 1,425 |
| EQUIPMENT/HARDWARE/SOFTWARE | 2,635 | 220 | 1,098 | 1,537 | 42% | (0) |
| POSTAGE | 400 | - | - | 400 | 0% | 167 |
| STAFF CONFERENCE & TRAINING | 2,200 | - | - | 2,200 | 0% | 917 |
| **TOTAL DIRECT EXPENSES:** | **19,185** | **231** | **4,555** | **14,630** | **24%** | **3,439** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.05 FTE) | 108,755 | 8,978 | 44,645 | 64,110 | 41% | 669 |
| BENEFITS EXPENSE | 30,528 | 2,710 | 13,085 | 17,443 | 43% | (365) |
| OTHER INDIRECT EXPENSE | 36,156 | 2,402 | 12,971 | 23,186 | 36% | 2,095 |
| **TOTAL INDIRECT EXPENSES:** | **175,440** | **14,090** | **70,701** | **104,739** | **40%** | **2,399** |
| **TOTAL ALL EXPENSES:** | **194,625** | **14,321** | **75,256** | **119,369** | **39%** | **5,838** |
| **NET INCOME (LOSS):** | **(194,625)** | **(14,321)** | **(75,256)** | **(119,369)** | **39%** | **5,838** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | - | - | 300 | 0% | 125 |
| STAFF MEMBERSHIP DUES | 1,200 | - | 553 | 647 | 46% | (53) |
| SUBSCRIPTIONS | 2,000 | - | 1,192 | 808 | 60% | (358) |
| STAFF TRAINING- GENERAL | 29,300 | 50 | 3,665 | 25,635 | 13% | 8,544 |
| RECRUITING AND ADVERTISING | 8,750 | 1,496 | 1,778 | 6,972 | 20% | 1,868 |
| HR INFORMATION SYSTEM | 65,950 | 6,231 | 30,548 | 35,402 | 46% | (3,069) |
| SALARY SURVEYS | 3,000 | - | - | 3,000 | 0% | 1,250 |
| CONSULTING SERVICES | 1,000 | - | - | 1,000 | 0% | 417 |
| STAFF CONFERENCE & TRAINING | 4,200 | 42 | 192 | 4,008 | 5% | 1,558 |
| TRANSFER TO INDIRECT EXPENSE | (115,700) | (7,818) | (37,928) | (77,772) | 33% | (10,280) |
| **TOTAL DIRECT EXPENSES:** | - | - | - | - | | - |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.00 FTE) | 504,229 | 35,586 | 181,071 | 323,158 | 36% | 29,024 |
| ALLOWANCE FOR OPEN POSITIONS | (200,000) | - | - | (200,000) | 0% | (83,333) |
| BENEFITS EXPENSE | 98,098 | 10,520 | 51,068 | 47,030 | 52% | (10,194) |
| OTHER INDIRECT EXPENSE | 137,739 | 9,173 | 49,544 | 88,195 | 36% | 7,847 |
| **TOTAL INDIRECT EXPENSES:** | **540,066** | **55,280** | **281,683** | **258,383** | **52%** | **(56,655)** |
| **TOTAL ALL EXPENSES:** | **540,066** | **55,280** | **281,683** | **258,383** | **52%** | **(56,655)** |
| **NET INCOME (LOSS):** | **(540,066)** | **(55,280)** | **(281,683)** | **(258,383)** | **52%** | **(56,655)** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | 29,667 | 248,667 | (28,667) | 113% | 157,000 |
| LAW CLERK APPLICATION FEES | 4,000 | 200 | 2,900 | 1,100 | 73% | 1,233 |
| **TOTAL REVENUE:** | **224,000** | **29,867** | **251,567** | **(27,567)** | **112%** | **158,233** |
| **DIRECT EXPENSES:** | | | | | | |
| SUBSCRIPTIONS | 331 | - | - | 331 | 0% | 138 |
| DEPRECIATION | 37,278 | 2,908 | 14,540 | 22,738 | 39% | 993 |
| CHARACTER & FITNESS INVESTIGATIONS | 100 | - | - | 100 | 0% | 42 |
| LAW CLERK BOARD EXPENSE | 9,000 | 450 | 2,669 | 6,331 | 30% | 1,081 |
| SOFTWARE HOSTING | 700 | 80 | 425 | 275 | 61% | (133) |
| LAW CLERK OUTREACH | 20,000 | 144 | 144 | 19,856 | 1% | 8,189 |
| **TOTAL DIRECT EXPENSES:** | **67,409** | **3,583** | **17,778** | **49,631** | **26%** | **10,310** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.18 FTE) ** | 104,845 | 8,787 | 40,628 | 64,217 | 39% | 3,058 |
| BENEFITS EXPENSE | 31,938 | 2,851 | 13,656 | 18,282 | 43% | (348) |
| OTHER INDIRECT EXPENSE | 40,633 | 2,696 | 14,554 | 26,079 | 36% | 2,377 |
| **TOTAL INDIRECT EXPENSES:** | **177,416** | **14,334** | **68,838** | **108,578** | **39%** | **5,086** |
| **TOTAL ALL EXPENSES:** | **244,825** | **17,916** | **86,615** | **158,210** | **35%** | **15,395** |
| **NET INCOME (LOSS):** | **(20,825)** | **11,950** | **164,952** | **(185,777)** | **-792%** | **173,629** |

**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 February 01, 2026 to February 28, 2026

**42% 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 | 2,200 | 14,399 | 14,601 | 50% | 2,316 |
| INVESTIGATION FEES | 25,000 | 2,095 | 9,380 | 15,620 | 38% | (1,037) |
| PRO HAC VICE | 435,000 | 44,460 | 232,842 | 202,158 | 54% | 51,592 |
| MEMBER CONTACT INFORMATION | 5,000 | - | 2,650 | 2,350 | 53% | 567 |
| PHOTO BAR CARD SALES | 260 | 36 | 252 | 8 | 97% | 144 |
| **TOTAL REVENUE:** | **494,260** | **48,791** | **259,523** | **234,737** | **53%** | **53,582** |
| **DIRECT EXPENSES:** | | | | | | |
| POSTAGE | 4,000 | - | 230 | 3,770 | 6% | 1,437 |
| SOFTWARE HOSTING | 18,380 | 2,076 | 10,970 | 7,410 | 60% | (3,312) |
| INVESTIGATION | 300 | - | - | 300 | 0% | 125 |
| **TOTAL DIRECT EXPENSES:** | **22,680** | **2,076** | **11,200** | **11,480** | **49%** | **(1,750)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.78 FTE) ** | 503,843 | 44,134 | 209,866 | 293,977 | 42% | 69 |
| BENEFITS EXPENSE | 139,284 | 12,620 | 59,902 | 79,381 | 43% | (1,867) |
| OTHER INDIRECT EXPENSE | 164,598 | 10,961 | 59,195 | 105,403 | 36% | 9,387 |
| **TOTAL INDIRECT EXPENSES:** | **807,725** | **67,715** | **328,964** | **478,761** | **41%** | **7,588** |
| **TOTAL ALL EXPENSES:** | **830,405** | **69,791** | **340,164** | **490,241** | **41%** | **5,838** |
| **NET INCOME (LOSS):** | **(336,145)** | **(21,000)** | **(80,641)** | **(255,504)** | **24%** | **59,419** |

**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 February 01, 2026 to February 28, 2026

**42% 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 | 1,638 | 6,617 | 10,383 | 39% | (466) |
| LLLT LATE LICENSE FEES | 137 | 511 | 511 | (374) | 373% | 454 |
| MCLE LATE FEES | 150 | 150 | 450 | (300) | 300% | 388 |
| **TOTAL REVENUE:** | **17,287** | **2,299** | **7,578** | **9,709** | **44%** | **375** |
| **DIRECT EXPENSES:** | | | | | | |
| LLLT BOARD | 9,000 | 476 | 842 | 8,158 | 9% | 2,908 |
| LLLT EDUCATION | 1,000 | - | - | 1,000 | 0% | 417 |
| **TOTAL DIRECT EXPENSES:** | **10,000** | **476** | **842** | **9,158** | **8%** | **3,324** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.43 FTE) ** | 41,479 | 3,401 | 17,170 | 24,309 | 41% | 113 |
| BENEFITS EXPENSE | 12,046 | 1,066 | 5,124 | 6,921 | 43% | (105) |
| OTHER INDIRECT EXPENSE | 14,807 | 976 | 5,270 | 9,537 | 36% | 899 |
| **TOTAL INDIRECT EXPENSES:** | **68,332** | **5,444** | **27,565** | **40,767** | **40%** | **907** |
| **TOTAL ALL EXPENSES:** | **78,332** | **5,919** | **28,407** | **49,925** | **36%** | **4,231** |
| **NET INCOME (LOSS):** | **(61,045)** | **(3,620)** | **(20,829)** | **(40,216)** | **34%** | **4,606** |

**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 February 01, 2026 to February 28, 2026

**42% 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 | 100 | 500 | 500 | 50% | 83 |
| MCLE LATE FEES | 3,000 | 1,050 | 3,150 | (150) | 105% | 1,900 |
| LPO EXAMINATION FEES | 18,000 | 100 | 12,200 | 5,800 | 68% | 4,700 |
| LPO LICENSE FEES | 158,000 | 13,080 | 61,336 | 96,664 | 39% | (4,497) |
| LPO LATE LICENSE FEES | 2,000 | 2,340 | 2,340 | (340) | 117% | 1,507 |
| **TOTAL REVENUE:** | **182,000** | **16,670** | **79,526** | **102,474** | **44%** | **3,693** |
| **DIRECT EXPENSES:** | | | | | | |
| FACILITY, PARKING, FOOD | 9,500 | 2,696 | 2,696 | 6,804 | 28% | 1,262 |
| EXAM WRITING | 15,000 | - | 4,200 | 10,800 | 28% | 2,050 |
| LPO BOARD | 4,000 | - | - | 4,000 | 0% | 1,667 |
| LPO OUTREACH | 500 | - | - | 500 | 0% | 208 |
| PRINTING & COPYING | 200 | 65 | 65 | 135 | 32% | 19 |
| SUPPLIES | 100 | - | - | 100 | 0% | 42 |
| SOFTWARE HOSTING | 3,404 | 321 | 1,699 | 1,705 | 50% | (280) |
| **TOTAL DIRECT EXPENSES:** | **32,704** | **3,082** | **8,659** | **24,045** | **26%** | **4,967** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.58 FTE) ** | 56,369 | 4,619 | 23,232 | 33,137 | 41% | 255 |
| BENEFITS EXPENSE | 16,315 | 1,446 | 6,988 | 9,327 | 43% | (190) |
| OTHER INDIRECT EXPENSE | 19,972 | 1,329 | 7,180 | 12,792 | 36% | 1,142 |
| **TOTAL INDIRECT EXPENSES:** | **92,656** | **7,395** | **37,400** | **55,256** | **40%** | **1,207** |
| **TOTAL ALL EXPENSES:** | **125,360** | **10,477** | **46,059** | **79,301** | **37%** | **6,174** |
| **NET INCOME (LOSS):** | **56,640** | **6,193** | **33,468** | **23,172** | **59%** | **9,868** |

**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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**42% OF YEAR COMPLETE**

## LEGISLATIVE

| | 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 | 2,500 | - | 157 | 2,343 | 6% | 884 |
| STAFF MEMBERSHIP DUES | 215 | - | - | 215 | 0% | 90 |
| JUD RECOMMEND COMMITTEE | 3,250 | 318 | 1,096 | 2,154 | 34% | 259 |
| SUBSCRIPTIONS | 2,000 | - | 1,990 | 10 | 99% | (1,157) |
| TELEPHONE | 575 | 50 | 248 | 327 | 43% | (8) |
| CONTRACT LOBBYIST | 12,500 | 3,125 | 6,250 | 6,250 | 50% | (1,042) |
| LEGISLATIVE REVIEW COMMITTEE | 1,250 | - | - | 1,250 | 0% | 521 |
| BOG LEGISLATIVE COMMITTEE | 300 | - | - | 300 | 0% | 125 |
| STAFF CONFERENCE & TRAINING | 2,200 | - | 248 | 1,952 | 11% | 669 |
| **TOTAL DIRECT EXPENSES:** | **24,790** | **3,493** | **9,989** | **14,801** | **40%** | **340** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.70 FTE) | 164,492 | 13,614 | 66,523 | 97,969 | 40% | 2,015 |
| BENEFITS EXPENSE | 47,770 | 4,253 | 20,552 | 27,218 | 43% | (648) |
| OTHER INDIRECT EXPENSE | 58,539 | 3,892 | 21,019 | 37,520 | 36% | 3,373 |
| **TOTAL INDIRECT EXPENSES:** | **270,801** | **21,759** | **108,094** | **162,707** | **40%** | **4,740** |
| **TOTAL ALL EXPENSES:** | **295,591** | **25,252** | **118,083** | **177,508** | **40%** | **5,080** |
| **NET INCOME (LOSS):** | **(295,591)** | **(25,252)** | **(118,083)** | **(177,508)** | **40%** | **5,080** |

# Washington State Bar Association

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For the Period from February 01, 2026 to February 28, 2026

**42% 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 | 59,500 | 280,600 | 389,400 | 42% | 1,433 |
| ACTIVITY APPLICATION LATE FEE | 250,000 | 21,700 | 105,800 | 144,200 | 42% | 1,633 |
| MCLE LATE FEES | 232,000 | 125,375 | 194,375 | 37,625 | 84% | 97,708 |
| ANNUAL ACCREDITED SPONSOR FEES | 36,250 | - | 36,250 | - | 100% | 21,146 |
| ATTENDANCE LATE FEES | 120,000 | 5,450 | 49,500 | 70,500 | 41% | (500) |
| COMITY CERTIFICATES | 30,000 | 2,675 | 25,400 | 4,600 | 85% | 12,900 |
| **TOTAL REVENUE:** | **1,338,250** | **214,700** | **691,925** | **646,325** | **52%** | **134,321** |
| **DIRECT EXPENSES:** | | | | | | |
| DEPRECIATION | 142,057 | 12,012 | 60,060 | 81,997 | 42% | (870) |
| STAFF MEMBERSHIP DUES | 525 | 525 | 525 | - | 100% | (306) |
| MCLE BOARD EXPENSES | 6,000 | - | 531 | 5,469 | 9% | 1,969 |
| STAFF TRAVEL/PARKING | 50 | - | - | 50 | 0% | 21 |
| STAFF CONFERENCE & TRAINING | 4,400 | - | - | 4,400 | 0% | 1,833 |
| **TOTAL DIRECT EXPENSES:** | **153,032** | **12,537** | **61,116** | **91,916** | **40%** | **2,648** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.73 FTE) | 407,360 | 37,618 | 183,353 | 224,008 | 45% | (13,619) |
| BENEFITS EXPENSE | 124,032 | 11,379 | 54,435 | 69,598 | 44% | (2,755) |
| OTHER INDIRECT EXPENSE | 162,876 | 10,833 | 58,501 | 104,376 | 36% | 9,364 |
| **TOTAL INDIRECT EXPENSES:** | **694,269** | **59,830** | **296,288** | **397,981** | **43%** | **(7,009)** |
| **TOTAL ALL EXPENSES:** | **847,301** | **72,367** | **357,404** | **489,897** | **42%** | **(4,362)** |
| **NET INCOME (LOSS):** | **490,949** | **142,333** | **334,521** | **156,428** | **68%** | **129,959** |

**Budget reallocations apply to this line item. For details, see FY26 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

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**42% 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 | 4,800 | 6,000 | 44% | 300 |
| NME PRODUCT SALES | 120,000 | 7,744 | 86,833 | 33,167 | 72% | 36,833 |
| DIGITAL VIDEO SALES | 25,000 | 833 | 20,090 | 4,910 | 80% | 9,673 |
| SPONSORSHIPS | 11,500 | - | 9,000 | 2,500 | 78% | 4,208 |
| SEMINAR REGISTRATIONS | 12,000 | 3,004 | 4,747 | 7,253 | 40% | (253) |
| TRIAL ADVOCACY PROGRAM | 12,000 | - | (149) | 12,149 | -1% | (5,149) |
| **TOTAL REVENUE:** | **191,300** | **12,781** | **125,321** | **65,979** | **66%** | **45,613** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 3,500 | 48 | 48 | 3,452 | 1% | 1,410 |
| STAFF CONFERENCE & TRAINING | 2,700 | - | (25) | 2,725 | -1% | 1,150 |
| SMALL TOWN AND RURAL COMMITTEE | 7,500 | - | - | 7,500 | 0% | 3,125 |
| PRINTING & COPYING | 1,600 | - | - | 1,600 | 0% | 667 |
| DISABILITY ACCOMMODATIONS | 2,000 | - | - | 2,000 | 0% | 833 |
| HONORARIUM | 1,500 | - | - | 1,500 | 0% | 625 |
| SUBSCRIPTIONS | 400 | - | - | 400 | 0% | 167 |
| NEW MEMBER LIAISON SECTION PROGRAM | 1,300 | 425 | 565 | 735 | 43% | (23) |
| SMALL TOWN AND RURAL COMMITTEE OUTREACH AND ACTIVITIES | 70,000 | - | 3,000 | 67,000 | 4% | 26,167 |
| ON24 OVERAGE CHARGE | 4,500 | 4,422 | 4,422 | 78 | 98% | (2,547) |
| MEMBER ENGAGEMENT COUNCIL | 500 | - | - | 500 | 0% | 208 |
| NEW MEMBER OUTREACH EVENTS | 5,000 | 788 | 938 | 4,062 | 19% | 1,145 |
| SPEAKERS & PROGRAM DEVELOP | 100 | - | - | 100 | 0% | 42 |
| WASHINGTON NEW MEMBERS COMMITTEE | 15,000 | 4,721 | 6,910 | 8,090 | 46% | (660) |
| TRIAL ADVOCACY EXPENSES | 3,200 | - | - | 3,200 | 0% | 1,333 |
| LAW LIBRARY DESKBOOK ACCESS | 10,000 | - | - | 10,000 | 0% | 4,167 |
| LAW SCHOOL OUTREACH | 500 | - | 66 | 434 | 13% | 143 |
| RECEPTION/FORUM EXPENSE | 1,000 | - | 17 | 983 | 2% | 399 |
| STAFF MEMBERSHIP DUES | 1,020 | - | - | 1,020 | 0% | 425 |
| LIBRARY MATERIALS/RESOURCES | 4,000 | 29 | 164 | 3,836 | 4% | 1,503 |
| SPEAKERS & PROGRAM DEVELOPMENT | 500 | - | - | 500 | 0% | 208 |
| AWARDS | 1,000 | - | 72 | 928 | 7% | 345 |
| **TOTAL DIRECT EXPENSES:** | **136,820** | **10,433** | **16,177** | **120,643** | **12%** | **40,831** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.73 FTE) | 341,638 | 29,201 | 146,070 | 195,568 | 43% | (3,721) |
| BENEFITS EXPENSE | 117,073 | 10,609 | 51,042 | 66,031 | 44% | (2,262) |
| OTHER INDIRECT EXPENSE | 162,876 | 10,833 | 58,501 | 104,376 | 36% | 9,365 |
| **TOTAL INDIRECT EXPENSES:** | **621,588** | **50,643** | **255,613** | **365,974** | **41%** | **3,382** |
| **TOTAL ALL EXPENSES:** | **758,408** | **61,076** | **271,790** | **486,617** | **36%** | **44,213** |
| **NET INCOME (LOSS):** | **(567,108)** | **(48,295)** | **(146,469)** | **(420,638)** | **26%** | **89,826** |

# Washington State Bar Association

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**42% 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% | 8,333 |
| WASHINGTON LEADERSHIP INSTITUTE | 100,000 | - | 100,000 | - | 100% | (58,333) |
| ED TRAVEL & OUTREACH | 6,000 | 531 | 2,686 | 3,314 | 45% | (186) |
| STAFF TRAVEL/PARKING | 2,000 | 198 | 990 | 1,010 | 50% | (157) |
| STAFF CONFERENCE & TRAINING | 13,300 | 2,001 | 3,782 | 9,518 | 28% | 1,760 |
| STAFF MEMBERSHIP DUES | 1,335 | 300 | 945 | 390 | 71% | (389) |
| **TOTAL DIRECT EXPENSES:** | **142,635** | **3,030** | **108,403** | **34,232** | **76%** | **(48,972)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (4.23 FTE) | 643,856 | 52,704 | 266,022 | 377,834 | 41% | 2,251 |
| BENEFITS EXPENSE | 142,505 | 13,246 | 63,790 | 78,715 | 45% | (4,413) |
| OTHER INDIRECT EXPENSE | 145,659 | 9,696 | 52,363 | 93,296 | 36% | 8,329 |
| **TOTAL INDIRECT EXPENSES:** | **932,020** | **75,646** | **382,175** | **549,845** | **41%** | **6,167** |
| **TOTAL ALL EXPENSES:** | **1,074,655** | **78,676** | **490,578** | **584,077** | **46%** | **(42,805)** |
| **NET INCOME (LOSS):** | **(1,074,655)** | **(78,676)** | **(490,578)** | **(584,077)** | **46%** | **(42,805)** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | 342 | 1,614 | 1,886 | 46% | (156) |
| STAFF MEMBERSHIP DUES | 2,500 | - | 2,004 | 497 | 80% | (962) |
| COURT RULES COMMITTEE | 1,000 | - | - | 1,000 | 0% | 417 |
| CUSTODIANSHIPS | 5,000 | - | 301 | 4,699 | 6% | 1,782 |
| WILLS | 1,000 | - | - | 1,000 | 0% | 417 |
| LITIGATION EXPENSES | 1,000 | - | - | 1,000 | 0% | 417 |
| DISABILITY ACCOMMODATIONS | 2,500 | - | 58 | 2,442 | 2% | 983 |
| STAFF CONFERENCE & TRAINING | 10,250 | - | 299 | 9,951 | 3% | 3,972 |
| **TOTAL DIRECT EXPENSES:** | **26,750** | **342** | **4,276** | **22,474** | **16%** | **6,870** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (6.12 FTE) | 718,300 | 56,195 | 283,647 | 434,653 | 39% | 15,645 |
| BENEFITS EXPENSE | 187,732 | 16,379 | 78,816 | 108,916 | 42% | (594) |
| OTHER INDIRECT EXPENSE | 210,741 | 14,038 | 75,812 | 134,929 | 36% | 11,997 |
| **TOTAL INDIRECT EXPENSES:** | **1,116,772** | **86,612** | **438,274** | **678,498** | **39%** | **27,047** |
| **TOTAL ALL EXPENSES:** | **1,143,522** | **86,954** | **442,550** | **700,972** | **39%** | **33,917** |
| **NET INCOME (LOSS):** | **(1,143,522)** | **(86,954)** | **(441,550)** | **(701,972)** | **39%** | **34,917** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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% | 42 |
| DISCIPLINARY BOARD EXPENSES | 3,000 | - | - | 3,000 | 0% | 1,250 |
| CHIEF HEARING OFFICER | 41,200 | 3,333 | 16,665 | 24,535 | 40% | 502 |
| COURT REPORTERS | 33,100 | - | 1,346 | 31,754 | 4% | 12,446 |
| HEARING OFFICER EXPENSES | 4,000 | - | 131 | 3,870 | 3% | 1,536 |
| HEARING OFFICER TRAINING | 1,000 | - | - | 1,000 | 0% | 417 |
| APPOINTED COUNSEL | 50,645 | 4,235 | 21,035 | 29,610 | 42% | 67 |
| DISCIPLINARY SELECTION PANEL | 1,000 | - | - | 1,000 | 0% | 417 |
| STAFF CONFERENCE & TRAINING | 2,200 | - | - | 2,200 | 0% | 917 |
| **TOTAL DIRECT EXPENSES:** | **136,245** | **7,568** | **39,177** | **97,069** | **29%** | **17,592** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.30 FTE) | 128,774 | 10,702 | 54,929 | 73,845 | 43% | (1,273) |
| BENEFITS EXPENSE | 37,003 | 3,293 | 16,154 | 20,850 | 44% | (736) |
| OTHER INDIRECT EXPENSE | 44,765 | 2,984 | 16,116 | 28,649 | 36% | 2,536 |
| **TOTAL INDIRECT EXPENSES:** | **210,543** | **16,979** | **87,199** | **123,343** | **41%** | **527** |
| **TOTAL ALL EXPENSES:** | **346,788** | **24,547** | **126,376** | **220,412** | **36%** | **18,119** |
| **NET INCOME (LOSS):** | **(346,788)** | **(24,547)** | **(126,376)** | **(220,412)** | **36%** | **18,119** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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% | 6,470 |
| STAFF TRAVEL/PARKING | 200 | - | - | 200 | 0% | 83 |
| **TOTAL DIRECT EXPENSES:** | **16,200** | **-** | **197** | **16,003** | **1%** | **6,553** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.55 FTE) ** | 63,145 | 5,212 | 26,292 | 36,852 | 42% | 18 |
| BENEFITS EXPENSE | 16,771 | 1,491 | 7,207 | 9,564 | 43% | (219) |
| OTHER INDIRECT EXPENSE | 18,939 | 1,265 | 6,833 | 12,107 | 36% | 1,059 |
| **TOTAL INDIRECT EXPENSES:** | **98,855** | **7,968** | **40,332** | **58,523** | **41%** | **858** |
| **TOTAL ALL EXPENSES:** | **115,055** | **7,968** | **40,528** | **74,526** | **35%** | **7,411** |
| **NET INCOME (LOSS):** | **(115,055)** | **(7,968)** | **(40,528)** | **(74,526)** | **35%** | **7,411** |

**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 February 01, 2026 to February 28, 2026

**42% 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% | (52,626) |
| **TOTAL REVENUE:** | **132,635** | **-** | **2,639** | **129,996** | **2%** | **(52,626)** |
| **DIRECT EXPENSES:** | | | | | | |
| DONATIONS/SPONSORSHIPS/GRANTS | - | (5,178) | (5,178) | 5,178 | | 5,178 |
| STAFF TRAVEL/PARKING | 2,000 | 18 | 39 | 1,961 | 2% | 794 |
| PRO BONO & PUBLIC SERVICE COMMITTEE | 3,500 | - | 1,882 | 1,618 | 54% | (424) |
| STAFF CONFERENCE & TRAINING | 3,200 | - | - | 3,200 | 0% | 1,333 |
| PRO BONO OUTREACH | 4,000 | - | - | 4,000 | 0% | 1,667 |
| **TOTAL DIRECT EXPENSES:** | **12,700** | **(5,160)** | **(3,257)** | **15,957** | **-26%** | **8,548** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.10 FTE) ** | 187,614 | 13,787 | 65,009 | 122,605 | 35% | 13,164 |
| BENEFITS EXPENSE | 50,197 | 4,819 | 21,546 | 28,652 | 43% | (630) |
| OTHER INDIRECT EXPENSE | 72,313 | 4,800 | 23,019 | 49,294 | 32% | 7,112 |
| **TOTAL INDIRECT EXPENSES:** | **310,124** | **23,406** | **109,573** | **200,551** | **35%** | **19,645** |
| **TOTAL ALL EXPENSES:** | **322,824** | **18,246** | **106,317** | **216,507** | **33%** | **28,193** |
| **NET INCOME (LOSS):** | **(190,189)** | **(18,246)** | **(103,678)** | **(86,511)** | **55%** | **(24,432)** |

**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 February 01, 2026 to February 28, 2026

**42% 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% | 83 |
| IMAGE LIBRARY | 4,800 | - | 4,756 | 44 | 99% | (2,756) |
| **TOTAL DIRECT EXPENSES:** | **5,000** | **-** | **4,756** | **244** | **95%** | **(2,673)** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.89 FTE) | 70,644 | 6,369 | 29,729 | 40,915 | 42% | (294) |
| BENEFITS EXPENSE | 22,914 | 2,123 | 9,976 | 12,938 | 44% | (428) |
| OTHER INDIRECT EXPENSE | 30,647 | 2,045 | 11,040 | 19,606 | 36% | 1,729 |
| **TOTAL INDIRECT EXPENSES:** | **124,205** | **10,536** | **50,745** | **73,460** | **41%** | **1,007** |
| **TOTAL ALL EXPENSES:** | **129,205** | **10,536** | **55,501** | **73,704** | **43%** | **(1,666)** |
| **NET INCOME (LOSS):** | **(129,205)** | **(10,536)** | **(55,501)** | **(73,704)** | **43%** | **(1,666)** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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% | (286) |
| STAFF CONFERENCE & TRAINING | 11,500 | - | 734 | 10,766 | 6% | 4,057 |
| STAFF TRAVEL/PARKING | 600 | - | 106 | 494 | 18% | 144 |
| **TOTAL DIRECT EXPENSES:** | **12,590** | **-** | **1,330** | **11,260** | **11%** | **4,201** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.00 FTE) ** | 288,255 | 22,873 | 115,072 | 173,184 | 40% | 5,035 |
| BENEFITS EXPENSE | 68,347 | 5,968 | 28,814 | 39,532 | 42% | (337) |
| OTHER INDIRECT EXPENSE | 68,870 | 4,575 | 24,706 | 44,164 | 36% | 3,990 |
| **TOTAL INDIRECT EXPENSES:** | **425,472** | **33,416** | **168,592** | **256,880** | **40%** | **8,688** |
| **TOTAL ALL EXPENSES:** | **438,062** | **33,416** | **169,922** | **268,139** | **39%** | **12,889** |
| **NET INCOME (LOSS):** | **(438,062)** | **(33,416)** | **(169,922)** | **(268,139)** | **39%** | **12,603** |

**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 February 01, 2026 to February 28, 2026

**42% 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% | 1,589 |
| OUTREACH EXPENSES | 10,000 | - | - | 10,000 | 0% | 4,167 |
| MEETING EXPENSE | 2,000 | - | - | 2,000 | 0% | 833 |
| SOFTWARE HOSTING | 20,000 | - | - | 20,000 | 0% | 8,333 |
| **TOTAL DIRECT EXPENSES:** | **57,000** | **-** | **8,828** | **48,172** | **15%** | **-** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (0.85 FTE) ** | 110,346 | 9,233 | 46,180 | 64,166 | 42% | (202) |
| BENEFITS EXPENSE | 27,639 | 2,472 | 11,850 | 15,789 | 43% | (334) |
| OTHER INDIRECT EXPENSE | 29,270 | 1,944 | 10,499 | 18,771 | 36% | 1,697 |
| **TOTAL INDIRECT EXPENSES:** | **167,255** | **13,648** | **68,528** | **98,726** | **41%** | **1,161** |
| **TOTAL ALL EXPENSES:** | **224,255** | **13,648** | **77,356** | **146,898** | **34%** | **1,161** |
| **NET INCOME (LOSS):** | **(224,255)** | **(13,648)** | **(77,356)** | **(146,898)** | **34%** | **16,083** |

**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 February 01, 2026 to February 28, 2026

**42% 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 | 31,294 | 381,759 | (106,759) | 139% | 267,176 |
| **TOTAL REVENUE:** | **275,000** | **31,294** | **381,759** | **(106,759)** | **139%** | **267,176** |
| **DIRECT EXPENSES:** | | | | | | |
| STAFF TRAVEL/PARKING | 1,900 | - | 304 | 1,596 | 16% | 487 |
| SECTION/COMMITTEE CHAIR MTGS | 500 | - | 71 | 429 | 14% | 137 |
| **TOTAL DIRECT EXPENSES:** | **2,400** | **-** | **376** | **2,024** | **16%** | **624** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (2.53 FTE) | 174,309 | 14,447 | 73,105 | 101,204 | 42% | (477) |
| BENEFITS EXPENSE | 61,514 | 5,504 | 26,652 | 34,863 | 43% | (1,021) |
| OTHER INDIRECT EXPENSE | 87,120 | 5,804 | 31,344 | 55,776 | 36% | 4,956 |
| **TOTAL INDIRECT EXPENSES:** | **322,943** | **25,754** | **131,101** | **191,842** | **41%** | **3,459** |
| **TOTAL ALL EXPENSES:** | **325,343** | **25,754** | **131,477** | **193,866** | **40%** | **4,083** |
| **NET INCOME (LOSS):** | **(50,343)** | **5,540** | **250,283** | **(300,626)** | **-497%** | **271,259** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | 50,830 | 615,149 | (164,006) | 136% | 427,173 |
| SEMINAR PROFIT SHARE | 157,850 | - | - | 157,850 | 0% | (65,771) |
| PUBLICATIONS REVENUE | 1,250 | - | - | 1,250 | 0% | (521) |
| OTHER | 43,073 | 1,645 | 20,297 | 22,776 | 47% | 2,350 |
| **TOTAL REVENUE:** | **653,316** | **52,475** | **635,446** | **17,870** | **97%** | **363,231** |
| **DIRECT EXPENSES:** | | | | | | |
| DIRECT EXPENSES OF SECTION ACTIVITIES | 810,582 | 10,639 | 110,581 | 700,001 | 14% | 227,162 |
| REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES | 280,540 | 31,294 | 381,759 | (101,220) | 136% | (264,868) |
| **TOTAL DIRECT EXPENSES:** | **1,091,122** | **41,933** | **492,340** | **598,781** | **45%** | **(37,706)** |
| **NET INCOME (LOSS):** | **(437,806)** | **10,542** | **143,106** | **(580,912)** | **-33%** | **325,525** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | 75,117 | 265,478 | 754,319 | 26% | 159,438 |
| STAFF TRAVEL/PARKING | 1,000 | - | 162 | 838 | 16% | 255 |
| STAFF MEMBERSHIP DUES | 410 | - | - | 410 | 0% | 171 |
| TELEPHONE | 90,000 | 7,039 | 39,953 | 50,047 | 44% | (2,453) |
| COMPUTER HARDWARE | 65,000 | 8,487 | 40,356 | 24,644 | 62% | (13,272) |
| COMPUTER SOFTWARE | 518,000 | 489 | 233,988 | 284,012 | 45% | (18,155) |
| HARDWARE SERVICE & WARRANTIES | 50,000 | 3,508 | 14,413 | 35,587 | 29% | 6,420 |
| SOFTWARE MAINTENANCE & LICENSING | 470,000 | 40,130 | 190,183 | 279,817 | 40% | 5,651 |
| THIRD PARTY SERVICES | 177,600 | 7,537 | 101,892 | 75,708 | 57% | (27,892) |
| CLOUD INFRASTRUCTURE | 130,000 | 21 | 15,375 | 114,625 | 12% | 38,791 |
| STAFF CONFERENCE & TRAINING | 6,000 | - | - | 6,000 | 0% | 2,500 |
| TRANSFER TO INDIRECT EXPENSES | (2,527,807) | (142,328) | (901,800) | (1,626,007) | 36% | (151,453) |
| **TOTAL DIRECT EXPENSES:** | - | - | - | - | | - |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (5.00 FTE) | 629,276 | 52,836 | 289,528 | 339,749 | 46% | (27,329) |
| BENEFITS EXPENSE | 158,341 | 14,300 | 74,169 | 84,172 | 47% | (8,194) |
| CAPITAL LABOR & OVERHEAD | - | (6,332) | (7,035) | 7,035 | | (7,035) |
| OTHER INDIRECT EXPENSE | 172,174 | 11,447 | 61,820 | 110,354 | 36% | 9,919 |
| **TOTAL INDIRECT EXPENSES:** | **959,791** | **72,251** | **418,482** | **541,309** | **44%** | **(32,639)** |
| **TOTAL ALL EXPENSES:** | **959,791** | **72,251** | **418,482** | **541,309** | **44%** | **(32,639)** |
| **NET INCOME (LOSS):** | **(959,791)** | **(72,251)** | **(418,482)** | **(541,309)** | **44%** | **(18,569)** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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% | 250 |
| STAFF MEMBERSHIP DUES | 385 | - | 424 | (39) | 110% | (264) |
| STAFF CONFERENCE & TRAINING | 4,500 | - | - | 4,500 | 0% | 1,875 |
| SUBSCRIPTIONS | 816 | - | 358 | 458 | 44% | (18) |
| VOLUNTEER RECOGNITION | 2,000 | - | 660 | 1,340 | 33% | 173 |
| REGULATORY SCHOOL | 10,000 | - | 5,286 | 4,714 | 53% | (1,119) |
| ABA DELEGATES | 18,000 | 73 | 73 | 17,927 | 0% | 7,427 |
| **TOTAL DIRECT EXPENSES:** | **36,301** | **73** | **6,801** | **29,500** | **19%** | **8,325** |
| **INDIRECT EXPENSES:** | | | | | | |
| SALARY EXPENSE (1.70 FTE) | 149,220 | 12,463 | 60,316 | 88,904 | 40% | 1,859 |
| BENEFITS EXPENSE | 45,777 | 4,069 | 19,827 | 25,950 | 43% | (753) |
| OTHER INDIRECT EXPENSE | 58,539 | 3,888 | 20,998 | 37,541 | 36% | 3,393 |
| **TOTAL INDIRECT EXPENSES:** | **253,536** | **20,420** | **101,141** | **152,395** | **40%** | **4,499** |
| **TOTAL ALL EXPENSES:** | **289,837** | **20,492** | **107,941** | **181,895** | **37%** | **4,499** |
| **NET INCOME (LOSS):** | **(289,837)** | **(20,492)** | **(107,941)** | **(181,895)** | **37%** | **12,824** |

## Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% 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 | 1,166,465 | 5,800,183 | 8,330,542 | 41% | 87,619 |
| TEMPORARY SALARIES | 212,850 | 21,156 | 65,822 | 147,028 | 31% | 22,866 |
| CAPITAL LABOR & OVERHEAD | - | (6,332) | (7,035) | 7,035 | | 7,035 |
| ALLOWANCE FOR OPEN POSITIONS | (200,000) | - | - | (200,000) | 0% | (83,333) |
| EMPLOYEE ASSISTANCE PLAN | 4,800 | 1,200 | 2,400 | 2,400 | 50% | (400) |
| EMPLOYEE SERVICE AWARDS | 2,260 | - | - | 2,260 | 0% | 942 |
| FICA (EMPLOYER PORTION) | 1,067,890 | 88,813 | 430,734 | 637,156 | 40% | 14,220 |
| L&I INSURANCE | 65,406 | - | 13,891 | 51,515 | 21% | 13,362 |
| WA STATE FAMILY MEDICAL LEAVE (EMPLOYER PO | 38,961 | 3,835 | 16,421 | 22,540 | 42% | (187) |
| MEDICAL (EMPLOYER PORTION) | 1,959,293 | 192,495 | 898,772 | 1,060,521 | 46% | (82,400) |
| RETIREMENT (EMPLOYER PORTION) | 778,534 | 64,678 | 322,606 | 455,928 | 41% | 1,783 |
| TRANSPORTATION ALLOWANCE | 25,944 | 280 | 25,960 | (16) | 100% | (15,150) |
| UNEMPLOYMENT INSURANCE | 73,419 | 9,503 | 27,509 | 45,910 | 37% | 3,082 |
| **TOTAL SALARY & BENEFITS EXPENSE:** | **18,160,082** | **1,542,094** | **7,597,264** | **10,562,818** | **42%** | **(30,563)** |
| WORKPLACE BENEFITS | 60,150 | 1,290 | 9,316 | 50,834 | 15% | 15,746 |
| HUMAN RESOURCES POOLED EXP | 115,700 | 7,818 | 37,928 | 77,772 | 33% | 10,280 |
| MEETING SUPPORT EXPENSES | 9,950 | 1,334 | 3,068 | 6,882 | 31% | 1,077 |
| RENT | 923,055 | 72,709 | 374,227 | 548,828 | 41% | 10,379 |
| PERSONAL PROP TAXES-WSBA | 6,500 | 410 | 2,884 | 3,616 | 44% | (176) |
| FURNITURE, MAINT, LH IMP | 48,450 | 924 | 7,528 | 40,922 | 16% | 12,659 |
| SAFETY & SECURITY | 10,420 | - | 740 | 9,680 | 7% | 3,602 |
| OFFICE SUPPLIES & EQUIPMENT | 19,635 | 1,320 | 6,322 | 13,313 | 32% | 1,860 |
| FURN, LH IMP, & OFFICE EQUIP DEPRECIATION | 224,084 | 18,465 | 93,120 | 130,964 | 42% | 248 |
| COMPUTER HARDWARE DEPRECIATION | 47,971 | 4,332 | 21,663 | 26,308 | 45% | (1,675) |
| COMPUTER SOFTWARE DEPRECIATION | 36,319 | 3,716 | 18,584 | 17,735 | 51% | (3,451) |
| INSURANCE | 273,491 | 22,171 | 110,856 | 162,635 | 41% | 3,099 |
| WORK HOME FURNITURE & EQUIP | 10,500 | - | 1,492 | 9,008 | 14% | 2,883 |
| PROFESSIONAL FEES-AUDIT | 43,500 | 15,960 | 41,695 | 1,805 | 96% | (23,570) |
| PROFESSIONAL FEES-LEGAL | 250,000 | 13,254 | 34,446 | 215,554 | 14% | 69,720 |
| ONLINE LEGAL RESEARCH | 89,000 | 7,950 | 32,766 | 56,234 | 37% | 4,317 |
| ACCOMODATIONS FUND | 6,500 | - | - | 6,500 | 0% | 2,708 |
| TRANSLATION SERVICES | 25,000 | 502 | 3,065 | 21,935 | 12% | 7,351 |
| TELEPHONE & INTERNET | 33,600 | 2,720 | 13,410 | 20,190 | 40% | 590 |
| POSTAGE - GENERAL | 12,000 | 601 | 3,423 | 8,577 | 29% | 1,577 |
| RECORDS MANAGEMENT | 7,500 | - | - | 7,500 | 0% | 3,125 |
| BANK FEES | 27,000 | 3,305 | 13,398 | 13,602 | 50% | (2,148) |
| PRODUCTION MAINTENANCE & SUPPLIES | 13,250 | (70) | 4,737 | 8,513 | 36% | 784 |
| COMPUTER POOLED EXPENSES | 2,527,807 | 142,257 | 901,474 | 1,626,333 | 36% | 151,779 |
| **TOTAL OTHER INDIRECT EXPENSES:** | **4,821,383** | **320,968** | **1,736,143** | **3,085,240** | **36%** | **272,767** |
| **TOTAL INDIRECT EXPENSES:** | **22,981,465** | **1,863,062** | **9,333,406** | **13,648,058** | **41%** | **242,204** |

# Washington State Bar Association

Statement of Activities

For the Period from February 01, 2026 to February 28, 2026

**42% OF YEAR COMPLETE**

| SUMMARY PAGE | FISCAL 2026 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE |
|---|---|---|---|---|
| ACCESS TO JUSTICE | (365,948) | (18,533) | (112,683) | (253,265) |
| ADMISSIONS/BAR EXAM | (70,382) | 61,813 | 352,382 | (422,765) |
| ADVANCEMENT FTE | (322,209) | (25,818) | (131,512) | (190,697) |
| BAR NEWS | (184,871) | (10,891) | (52,422) | (132,449) |
| BENCH BAR PRESS | - | (88) | 1,350 | (1,350) |
| BOARD OF GOVERNORS | (656,550) | (32,352.99) | (191,372) | (465,178) |
| CONFERENCE & BROADCAST SERVICES | (83,138) | (6,692) | (34,270) | (48,868) |
| CHARACTER & FITNESS BOARD | (183,031) | (12,916) | (74,330) | (108,701) |
| CLE - PRODUCTS | 651,708 | 11,432 | 387,934 | 263,774 |
| CLE - SEMINARS | (521,923) | (58,536) | (268,324) | (253,600) |
| CLIENT PROTECTION FUND | 244,100 | 82,764 | 698,040 | (453,940) |
| COMMUNICATIONS | (927,116) | (63,986) | (324,091) | (603,024) |
| COMMUNICATIONS FTE | (257,458) | (21,103) | (107,398) | (150,060) |
| DESKBOOKS | (261,267) | (422) | (80,064) | (181,203) |
| DISCIPLINE | (6,714,684) | (532,585) | (2,634,551) | (4,080,133) |
| DIVERSITY | (269,646) | (24,873) | (65) | (269,581) |
| ENTITY REGULATION | (67,555) | (7,449) | (41,387) | (26,168) |
| FACILITIES & OPERATIONS | (749,267) | (62,604) | (316,313) | (432,953) |
| FINANCE | (630,173) | (47,964) | (258,317) | (371,856) |
| FOUNDATION | (194,625) | (14,321) | (75,256) | (119,369) |
| HUMAN RESOURCES | (540,066) | (55,280) | (281,683) | (258,383) |
| LAW CLERK PROGRAM | (20,825) | 11,950 | 164,952 | (185,777) |
| LEGISLATIVE | (295,591) | (25,252) | (118,083) | (177,508) |
| LEGAL LUNCHBOX | (34,025) | (8,474) | 89 | (34,113) |
| LICENSE FEES | 17,652,266 | 1,922,555 | 7,326,078 | 10,326,188 |
| LICENSING AND MEMBERSHIP | (336,145) | (21,000) | (80,641) | (255,504) |
| LIMITED LICENSE LEGAL TECHNICIAN | (61,045) | (3,620) | (20,829) | (40,216) |
| LIMITED PRACTICE OFFICERS | 56,640 | 6,193 | 33,468 | 23,172 |
| MANDATORY CLE ADMINISTRATION | 490,949 | 142,333 | 334,521 | 156,428 |
| MEMBER WELLNESS PROGRAM | (247,030) | (21,507) | (100,617) | (146,413) |
| MINI CLE | (134,341) | (11,092) | (54,963) | (79,378) |
| MEMBER SERVICES & ENGAGEMENT | (418,764) | (29,644) | (134,450) | (284,313) |
| NEW MEMBER EDUCATION | 20,022 | 916 | 42,855 | (22,834) |
| OFFICE OF GENERAL COUNSEL | (1,143,522) | (86,954) | (441,550) | (701,972) |
| OFFICE OF THE EXECUTIVE DIRECTOR | (1,074,655) | (78,676) | (490,578) | (584,077) |
| OGC-DISCIPLINARY BOARD | (346,788) | (24,547) | (126,376) | (220,412) |
| PRACTICE OF LAW BOARD | (115,055) | (7,968) | (40,528) | (74,526) |
| PRACTICE MANAGEMENT ASSISTANCE | (186,220) | 587 | (112,788) | (73,432) |
| PROFESSIONAL RESPONSIBILITY PROGRAM | (224,777) | (17,554) | (89,721) | (135,056) |
| PUBLIC SERVICE PROGRAMS | (190,189) | (18,246) | (103,678) | (86,511) |
| PUBLICATION & DESIGN SERVICES | (129,205) | (10,536) | (55,501) | (73,704) |
| REGULATORY SERVICES FTE | (438,062) | (33,416) | (169,922) | (268,139) |
| REGULATORY REFORM | (224,255) | (13,648) | (77,356) | (146,898) |
| SECTIONS ADMINISTRATION | (50,343) | 5,540 | 250,283 | (300,626) |
| SECTIONS OPERATIONS | (437,806) | 10,542 | 143,106 | (580,912) |
| TECHNOLOGY | (959,791) | (72,251) | (418,482) | (541,309) |
| VOLUNTEER EDUCATION | (289,837) | (20,492) | (107,941) | (181,895) |
| INDIRECT EXPENSES | 22,981,465 | 1,863,062 | 9,333,406 | 13,648,058 |
| **TOTAL OF ALL** | **(21,738,972)** | **(2,618,393)** | **(11,340,418)** | **(10,398,554)** |
| **NET INCOME (LOSS)** | **(1,242,493)** | **755,332** | **2,007,012** | **(3,249,504)** |

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.

WASHINGTON STATE
BAR ASSOCIATION

# 2026-2027 WSBA BOARD OF GOVERNORS MEETING SCHEDULE

| MEETING DATE | LOCATION | DESCRIPTION | EXECUTIVE COMMITTEE MEETING | MATERIALS DEADLINE |
|---|---|---|---|---|
| October 16-17, 2026 | Clearwater Casino Resort<br>Seattle, WA | Team Building Retreat | N/A | N/A |
| November 6-7, 2026 | Courtyard Marriott Columbia Point<br>Richland, WA | BOG Meeting | October 8, 2026 | October 1, 2026 |
| January 15-16, 2027 | WSBA Conference Center<br>Seattle, WA | BOG Meeting<br>KCBA MLK Luncheon Jan. 15 | December 17, 2026 | December 8, 2026 |
| March 19-20, 2027 | TBD<br>Olympia, WA | BOG Meeting | February 18, 2027 | February 10, 2027 |
| May 13-14, 2027 | Enzian Inn<br>Leavenworth, WA | BOG Meeting | April 22, 2027 | April 13, 2024 |
| July 7, 2027<br>July 8, 2027<br>July 9-10, 2027 | Silver Reef Casino Resort,<br>Ferndale, WA | New Governor Orientation<br>BOG Planning Retreat<br>BOG Meeting | June 17, 2027 | June 8, 2027 |
| September 24-25, 2027 | Hotel Indigo<br>Vancouver, WA | BOG Meeting | September 2, 2027 | August 24, 2027 |

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# ***BASIC CHARACTERISTICS OF MOTIONS***

**From:** ***The Complete Idiot's Guide to Robert's Rules***
***The Guerilla Guide to Robert's Rules***

| MOTION | PURPOSE | INTERRUPT SPEAKER? | SECOND NEEDED? | DEBATABLE? | AMENDABLE? | VOTE NEEDED |
|---|---|---|---|---|---|---|
| 1. Fix the time to which to adjourn | Sets the time for a continued meeting | No | Yes | No[1] | Yes | Majority |
| 2. Adjourn | Closes the meeting | No | Yes | No | No | Majority |
| 3. Recess | Establishes a brief break | No | Yes | No[2] | Yes | Majority |
| 4. Raise a Question of Privilege | Asks urgent question regarding to rights | Yes | No | No | No | Rules by Chair |
| 5. Call for orders of the day | Requires that the meeting follow the agenda | Yes | No | No | No | One member |
| 6. Lay on the table | Puts the motion aside for later consideration | No | Yes | No | No | Majority |
| 7. Previous question | Ends debate and moves directly to the vote | No | Yes | No | No | Two-thirds |
| 8. Limit or extend limits of debate | Changes the debate limits | No | Yes | No | Yes | Two-thirds |
| 9. Postpone to a certain time | Puts off the motion to a specific time | No | Yes | Yes | Yes | Majority[3] |
| 10. Commit or refer | Refers the motion to a committee | No | Yes | Yes | Yes | Majority |
| 11. Amend an amendment (secondary amendment) | Proposes a change to an amendments | No | Yes | Yes[4] | No | Majority |
| 12. Amend a motion or resolution (primary amendment) | Proposes a change to a main motion | No | Yes | Yes[4] | Yes | Majority |
| 13. Postpone indefinitely | Kills the motion | No | Yes | Yes | No | Majority |
| 14. Main motion | Brings business before the assembly | No | Yes | Yes | Yes | Majority |

*1 Is debatable when another meeting is scheduled for the same or next day, or if the motion is made while no question Is pending*

*2 Unless no question is pending*

*3 Majority, unless it makes question a special order*

*4 If the motion it is being applied to is debatable*

# Discussion Protocols
# Board of Governors Meetings

**Philosophical Statement:**

"We take serious our representational responsibilities and will try to inform ourselves on the subject matter before us by contact with constituents, stakeholders, WSBA staff and committees when possible and appropriate. In all deliberations and actions we will be courageous and keep in mind the need to represent and lead our membership and safeguard the public. In our actions, we will be mindful of both the call to action and the constraints placed upon the WSBA by GR 12 and other standards."

**Governor's Commitments:**

1. Tackle the problems presented; don't make up new ones.
2. Keep perspective on long-term goals.
3. Actively listen to understand the issues and perspective of others before making the final decision or lobbying for an absolute.
4. Respect the speaker, the input and the Board's decision.
5. Collect your thoughts and speak to the point – sparingly!
6. Foster interpersonal relationships between Board members outside Board events.
7. Listen and be courteous to speakers.
8. Speak only if you can shed light on the subject, don't be repetitive.
9. Consider, respect and trust committee work but exercise the Board's obligation to establish policy and insure that the committee work is consistent with that policy and the Board's responsibility to the WSBA's mission.
10. Seek the best decision through quality discussion and ample time (listen, don't make assumptions, avoid sidebars, speak frankly, allow time before and during meetings to discuss important matters).
11. Don't repeat points already made.
12. Everyone should have a chance to weigh in on discussion topics before persons are given a second opportunity.
13. No governor should commit the board to actions, opinions, or projects without consultation with the whole Board.
14. Use caution with e-mail: it can be a useful tool for debating, but e-mail is not confidential and does not easily involve all interests.
15. Maintain the strict confidentiality of executive session discussions and matters.

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## BOARD OF GOVERNORS

# WSBA VALUES

Through a collaborative process, the WSBA Board of Governors and Staff have identified these core values that shall be considered by the Board, Staff, and WSBA volunteers (collectively, the "WSBA Community") in all that we do.

To serve the public and our members and to promote justice, the WSBA Community values the following:

- Trust and respect between and among Board, Staff, Volunteers, Members, and the public
- Open and effective communication
- Individual responsibility, initiative, and creativity
- Teamwork and cooperation
- Ethical and moral principles
- Quality customer-service, with member and public focus
- Confidentiality, where required
- Diversity and inclusion
- Organizational history, knowledge, and context
- Open exchanges of information

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# BOARD OF GOVERNORS

## GUIDING COMMUNICATION PRINCIPLES

In each communication, I will assume the good intent of my fellow colleagues; earnestly and actively listen; encourage the expression of and seek to affirm the value of their differing perspectives, even where I may disagree; share my ideas and thoughts with compassion, clarity, and where appropriate confidentiality; and commit myself to the unwavering recognition, appreciation, and celebration of the humanity, skills, and talents that each of my fellow colleagues bring in the 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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## BOARD OF GOVERNORS

**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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WASHINGTON STATE
BAR ASSOCIATION

**Office of the Executive Director**

## MEMO

**TO:** Board of Governors
**FROM:** Executive Director Terra Nevitt
**DATE:** April 24, 2026
**RE:** DEI Council's Recommendations Re Governor At-Large Candidates

---

ACTION: Decide whether to accept the DEI Council's recommendations to include Tom Ahearne and Qian (Sophie) Ying on the ballot for at-large governor, or to select additional qualifying candidates for inclusion on the ballot.

Summary
The Board of Governors is asked to accept the Council's recommendation to include only two candidates on the ballot for the Governor At-Large position on the Board of Governors or to take action to select additional qualifying candidates for inclusion on the ballot.

Overview
The election of Governor At-Large is scheduled to begin on May 15, as set forth in the WSBA Bylaws. The WSBA received six timely applications, and one candidate has since withdrawn. The attached memo describes the process the Diversity, Equity and Inclusion Council followed to assess the candidates, along with its recommendation for two candidates to be placed on the ballot to be elected by all eligible members.

The WSBA Bylaws state, "If the DEI Council forwards less than three candidates by May 1, the Executive Director shall notify the BOG, which may, at its option, select additional qualifying candidates on its own or place only those candidates forwarded by the DEI Council on the ballot to be elected by all eligible voting members." The Bylaws also state that the Governor At Large election shall take place May 15 – June 1.

Attachments
Memo from the Diversity Equity and Inclusion Council, April 23, 2026

WASHINGTON STATE
BAR ASSOCIATION

**Memo**

| | |
|---|---|
| **To:** | Terra Nevitt, Executive Director |
| **CC:** | Paris Ericksen, Volunteer Engagement Advisor |
| **From:** | Alec Stephens and Governor Kristina Larry, DEI Council Co-Chairs |
| **Date:** | April 23, 2026 |
| **Re:** | DEI Council's Recommendation for Member At-Large Candidates |

We are writing about the 2026 Member At-Large seat election process and the Diversity, Equity and Inclusion Council's decision on which applicants to forward on to the election ballot.

The following six people submitted an application for the Member At-Large seat by the April 15, 2026, deadline:

1. Tom Ahearne
2. George Fearing
3. Thomas Hackett
4. Christal Olivia Irwin
5. Qian (Sophie) Ying
6. Faqiha Zahra

Each applicant was offered the optional opportunity to be interviewed by the DEI Council on April 22nd and/or submit written responses to four interview questions that have been posted on the WSBA website since applications were open.

George Fearing withdrew his application on April 21st. The rest of the applicants opted in to the interview and were scheduled for a 10-minute, virtual interview on April 22nd. These applicants (other than Thomas Hackett who decided at the last minute not to be interviewed) were asked the following questions:

1. Can you share about your lived experience and knowledge of the needs of members who have been historically underrepresented in governance at WSBA?
2. What is your understanding of the purpose of the Member At-Large role and how do you intend to fulfill the obligation of the role?
3. General Rule 12.2 provides that the WSBA should strive to promote diversity and equality in the legal profession and courts. How do you think the Board of Governors should carry out this responsibility under 12.2?
4. The WSBA Board of Governors approved the new WSBA Equity and Justice Plan in May 2025. How will your experience and knowledge help the Bar advance the Plan?

In addition to the interviews, the Council reviewed the materials submitted by every applicant, which are attached to this memorandum. In its review of materials, interviews and deliberation, the DEI Council referenced its Governor Applicant Review Guidance (which was posted on the WSBA webpage when applications opened) which includes reference to WSBA Bylaw VI(C)(3)(a), noting that the Council shall forward to the Executive Director candidates "who have a lived experience and knowledge of the needs of those members whose membership is or may be historically underrepresented in governance to the end that the BOG will be a more diverse and representative body than the results of the election of Governors based solely on Congressional Districts may allow."

Upon reviewing the applicants' materials, interview (if applicable) and relevant Bylaws, the Council is forwarding the following people to be placed on the ballot:

- Tom Ahearne
- Qian (Sophie) Ying

The Council based its decision on the Selection Criteria outlined in the Governor Applicant Review Guidance.

If you have any questions, please contact the DEI Council staff liaison, Diana Singleton.

# WSBA Governor At Large Applicant Materials

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# WASHINGTON STATE BAR ASSOCIATION

## Board of Governors – Governor At-Large - Application Form

**All Application materials must be received by 5 p.m. PST on ~~Tuesday~~Wednesday, April 15, 2026.**
*Late materials will not be accepted.*

### INSTRUCTIONS

1. Review all information regarding board service, the application and the election processes online here.
2. Complete this required application form. If you are nominating someone else, ask them to sign it below.
3. Email this signed form and materials to barleaders@wsba.org. Applications must be received by 5 p.m. PST on Wednesday, April 15, 2026. Late applications will not be accepted.

| Applicant Information | |
|---|---|
| **Name** | Tom Ahearne |
| **WSBA Bar #** | 14844 |
| **Email Address** | ahearne@foster.com |
| **Phone Number** | [redacted] |

### Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor At-Large.

Tom Ahearne — 14844
Name of Candidate (please print) — WSBA Bar #

Signature of Nominator (if applicable) — WSBA Bar #

Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on April 15, 2026. Filing may be accomplished by emailing the scanned form to barleaders@wsba.org. For questions, please email Manager of Volunteer Engagement Paris Eriksen, at parise@wsba.org.

Tom Ahearne's limited to 200 words Candidate Statement

A line in that *Amazing Grace* song took on a new meaning for me 12 years ago.

The line? "I once was blind, but now I see."

Why? Because 12 years ago, an accident imprisoned me in a wheelchair for the rest of my life – changing me from a person who never felt unwelcomed, excluded, or discriminated against to a person who feels that way every day. Opening my eyes to daily realities faced by others I previously had little in common with. Making me see Diversity, Equity, and Inclusion not as a woke mantra that replaces merit, but a fundamentally American ideal that releases merit.

Fundamentally American to me because I grew up on military bases, where in school every morning we'd stand, put our hand over our heart, and pledge allegiance to our "one nation, ... with liberty and justice for all."

All means all. Every person. **Inclusion**.

Justice for all means exactly that. Not justice disproportionately, but equally. **Equity**.

One nation means one nation, which is made stronger by our diverse perspectives and communities. **Diversity**.

I believe WSBA must lead towards fulfilling this promise of America by, amongst other things, effectively implementing WSBA's Equity & Justice Plan.

# Thomas F. Ahearne

Principal

1111 Third Avenue
Suite 3000
Seattle, WA 98101

T 206.447.8934
Cell [redacted]
F 206.749.1902
ahearne@foster.com

## Tom Ahearne has over 30 years of trial court and appellate experience in high profile and complex cases, commonly focusing on:

**Constitutional Law, Statutory Rights, & Election Disputes:** Examples include (a) constitutional compliance suits (e.g., the multi-billion dollar *McCleary* school funding litigation), (b) election disputes (e.g., the series of state & federal lawsuits over the Rossi/Gregoire Governor's race decided by 133 votes out of over 2.8 million), (c) ballot measure challenges (e.g., Initiatives 1234, 1776, 1000, 933, 895, 892, 885, 884, 864, 860, 773, 732 & Referendum 88), (d) Public Records Act suits (e.g., sensitive records from the Marysville High School & Seattle Pacific University shootings), and (e) suits over the validity of statutes & initiatives (e.g., defending Washington's Top-Two primary system in the U.S. Supreme Court & invalidating several Tim Eyman ballot measures). Frequent speaker at national conferences on these topics.

**Insurance Coverage:** Representing policyholders & claimants in a wide array of state & federal court lawsuits since the 1980s; frequent speaker on insurance coverage at legal education seminars & industry association conferences; Best Lawyers® 2011 Seattle Insurance Law "Lawyer of the Year".

**Cybercrime:** Representing clients victimized by cyber intrusion, cyber fraud, and cyber crime; advising on protection, prevention, & legal liabilities; damage mitigation planning

☑ **Education:** University of Chicago, J.D. *with honors* (1984);
University of Notre Dame, B.A. Economics, *magna cum laude* (1981);
Princeton University, Preschool, *with crayons* (1964)

☑ **Admissions:** Washington (1984); U.S. District Court, W.D. Washington (1984), E.D. Washington (1991); U.S. Court of Appeals, 9th Circuit (1991); U.S. Supreme Court (2006); numerous *pro hac vice* admissions across the country

## **Honors & Recognitions** *(just some examples)*:

- *University of Notre Dame* Reverand Cavanaugh Award for public service (2025)
- *Forbes* America's Best-In-State Lawyers (2025) (only 13 Washington lawyers listed)
- *Chambers USA* (Washington) Leading Individual, Insurance, 2024-present
- *The Best Lawyers in America*© – Insurance Law (2007-present)
- *Washington Super Lawyers* – Super Lawyer selection (2000-present)
- Washington State PTA – Exceptional Service Award (2015)
- Washington Association of Educators – Distinguished Advocate Award (2015)
- "Paramount Duty-Thomas Ahearne Wins For Public Education" [pp 18-23] (2012)
- *The Super Lawyers Blog* – "Thomas Ahearne Scores Win for Education" (2012).
- *Best Lawyers*® 2011 Insurance "Lawyer of the Year" in Seattle
- Washington Association of School Administrators "Golden Gavel" Award for outstanding contribution to public education (2010)

## **Professional Activities** *(just some examples)*:

- Washington State Bar Association (WSBA): Board of Governors, state-wide elected DEI position (2023-present); Executive Committee (2025-present)
- Washington Defense Trial Lawyers (WDTL): Board of Trustees (2022-present)
- King County Bar Association (KCBA) Appellate Section: Chair (2022-2023)
- Washington Counsel of School Attorneys (COSA): Executive Board 2019-present; President 2023
- Member: Washington State Association of Municipal Attorneys (WSAMA); Risk and Insurance Management Society (RIMS); Federal Bar Association (FBA); American Bar Association (ABA) Litigation & Insurance Coverage Litigation Committees

## **Community / Other Activities** *(just some examples)*:

- NAACP [National Association for the Advancement of Colored People]: Executive Board member for Alaska/Oregon/Washington regional conference (2020-2025); Legal Redress Chair for Alaska/Oregon/Washington regional conference (2020-2025); elected delegate to the 2021 National NAACP Convention
- Bainbridge Island School District: Disability Awareness Program classroom presenter/workshop leader (Wilkes & Blakely elementary schools) (2016-2021)
- 600cc racer Washington Motorcycle Road Racing Association (WMRRA)(2009-February 11, 2014); Mad Hatter Motorcycle Racing Team (2011-February 11, 2014)
- Cascade Bicycle Club (2021 onward): Seattle To Portland STP (2023): Ride the Hurricane (2023); Mount Baker Hill Climb / Thank You From Tom (2022); From Paralympic Racing To Recreational Riding (2021); Conquering Disability and Chilly Hilly (2021)
- Washington State Bowhunters: member (2002-February 11, 2014)
- Bainbridge Island Football Club *[called "Soccer" in the U.S.]*: Board Member & Secretary (2009-2013)
- Washington State Hillary Clinton delegate: Democratic National Convention (2008)

**Media Coverage** *(just some examples)*:

- KING 5 News (Seattle): "Leveling the playing field: Lawsuit could change how Washington funds education" (2022); "Lawyer for McCleary Family on Decision" (2018); "McCleary Attorney: It's About Time" (2015); "Paralyzed Lawyer Still Standing For Washington Children" (2014); Lawyer for McCleary family on decision in education funding (2014); "Inside Politics: McCleary v. the State of Washington" (2013); "Jean Enersen's Northwest Newsmakers on King 5" (2013).
- *Seattle Times*: "No clear answers as WA Supreme Court hears case on school construction" (2023); "Abandoning WA students to learn in cold, leaky schools is disgraceful" (2023)
- TVW: *Wahkiakum School District v. State Supreme Court* Argument (2023);
- NPR / KUOW: Do school levies put an unfair burden on rural districts? (2022)
- *Spokane Spokesman-Review:* The next McCleary? Tiny district sues state (2023)
- *Longview Daily News*: Wahkiakum schools' lawsuit seeking money for aging buildings presses on (2022)
- *Wahkiakum County Eagle*: School facilities suit headed to state supreme court (2023); State Supreme Court to hear school board case in March (2022) ; Supreme court will hear Wahkiakum suit (2022)
- *Salish Current*: Bond system, wealth inequity: targets of school-funding suit (2023)
- *Lewiston Idaho Tribune*: Abandoning Washington students is disgraceful (2023)
- *Walla-Walla Union-Bulletin*: Abandoning WA students to learn in cold, leaky schools is disgraceful (2023)
- *The Lewis County Chronicle*: The Next McCleary? Tiny District With Decaying School Buildings Sues Washington State (2023)
- *The Clark County Columbian*: Equitable School Funding Again Builds Concern (2022); No clear answers as Washington Supreme Court hears case on school construction (2023)
- *Yakima Herald*: No Clear Answers As Supreme Court Hears Case (2023)
- *Spokane Journal of Business*: Cyberliability Risks (2022)
- University of Washington College of Education: Guest Lecture by Thomas Ahearne, Lead Counsel for the McCleary case (2019)
- PBS Northwest Now: McCleary Funding (2017)
- *KREM 2* News *(Spokane):* "Extended Interview with McCleary Family Lawyer" (2017)
- *The Boston Globe*: "In Northwest, a question of tax cuts or education" (2015)
- *Publicola at* Seattle *Met* - "Best of Fizz 2014" (2014)
- TVW: McCleary Supreme Court arguments: 2017 Supreme Court hearing; 2016 Supreme Court hearing; 2014 Supreme Court hearing; 2011 Supreme Court hearing;
- TVW: Paramount Duty Coalition Conference (2011)
- *Washington State Bar News* -"Briefly About: Tom Ahearne" (2011)
- *Seattle Magazine* –"2010 Most Influential Lawyer of the Year"
- TVW: Washington State Joint Task Force on Basic Education Finance (2007)

## PAST CASES *(just a handful of examples)*:

**SOME CONSTITUTIONAL LITIGATION EXAMPLES**

- *McCleary v. State* (action to enforce State Constitution's public education clause), 173 Wn.2d 477, ensuing 2012-2018 enforcement proceedings posted on the Supreme Court's website at McCleary Orders & briefing (King County Superior Court & Washington Supreme Court)
- *Washington State Grange v. Washington State Republican Party, et al.*, (representing Washington State Grange in the ultimately successful defense of its Top-Two Primary Initiative Measure against First Amendment facial challenges by the Democrat, Republican, & Libertarian parties), 552 U.S. 442, reversing 460 F.3d 1108 & 377 F.Supp.2d 907 (U.S. Supreme Court, 9thCircuit, & W.D.Wash.)
- *Washington State Democratic Party v. Washington State Grange*, (representing defendant Grange in successfully obtaining dismissal of political parties' as applied challenges to the constitutionality of the Grange's Top-Two Primary Initiative Measure), 676 F.3d 784, cert. denied 133 S.Ct. 110 (U.S. Supreme Court, 9th Circuit & W.D.Wash.)
- *Senator Brown Lieutenant v. Governor Owen*, (original jurisdiction Supreme Court mandamus action to enforce State constitution's majority-vote provision), 165 Wn.2d 706 (Washington Supreme Court)
- *Pierce County v. State II*, (class refunds & constitutional contracts clause litigation), 159 Wn.2d 16 (Washington Supreme Court & King County Superior Court)
- *Brown v. State*, (action to enforce State Constitution & portions of Initiative 732),155 Wn.2d 254 (Washington Supreme Court & King County Superior Court)

- *McGowan, et al. v. State*, (action to enforce portions of Initiative 732), 148 2d 278 (Washington Supreme Court & Thurston County Superior Court)
- *Washington Association of Neighborhood Stores v. State*, (representing Initiative sponsor defending constitutional challenge to Initiative 773), 149 Wn.2d 359 (Washington Supreme Court & Thurston County Superior Court)
- *City of Burien, et al. v. Kiga, et al.*, (representing plaintiffs in constitutional challenge invalidating Initiative 722) 144 Wn.2d 819 (Washington Supreme Court & Thurston, King, Kitsap, Spokane, & Skagit County Superior Courts)
- *Governor Locke, et al. v. Reed, et al.*, Wash.S.Ct case #75392-0 (representing Governor in Supreme Court original jurisdiction action concerning referendum measures and veto power) (Washington Supreme Court)
- *Pierce County, et al. v. State I*, (representing plaintiffs in constitutional challenge to Initiative 776), 150 Wn.2d 422 (Washington Supreme Court & King County Superior Court)
- *Amalgamated Transit Union, et al. v. State*, (representing plaintiffs in constitutional challenge invalidating Initiative 695), 142 Wn.2d 183 (Washington Supreme Court & King, Thurston, & Yakima County Superior Courts)
- *City of Seattle, et al. v. "Save Our Schools" Initiative Committee, et*, (representing Seattle in defense of pre-election challenge to City Initiative 34), 779 P.2d 726 (Washington Supreme Court & King County Superior Court)
- *Satomi Owners Association v. Satomi LLC*, (action to enforce arbitration clause under U.S. Constitution's supremacy clause), 167 Wn.2d 781 (Washington Supreme Court, Court of Appeals, & King County Superior Court)
- *Bonjorni v. City of Auburn*, (defending Auburn against constitutional & statutory challenges to its municipal court system), 1998 WL 781152 (Washington Supreme Court, Court of Appeals, & King County Superior Court)
- *Concerned Citizens, et al. v. AHS Joint Operating Board, et al.*, (defending municipal Joint Operating Agency against constitutional, statutory, & common law challenges to its operations) 78 Wn.App. 333, 127 Wn.2d 1024 (Washington Supreme Court, Court of Appeals, & Skagit County Superior Court)
- *Kendall, et al. v. Public Hospital District No 6*, (defending hospital district against statutory & constitutional challenges to the legality of its operations), 118 2d 1 (Washington Supreme Court & Grant County Superior Court)

- Frequent speaker at legal education seminars / association conferences on state & federal constitutional issues including civil rights, education, and equal protection clauses, first amendment protections, and initiative powers. E.g., for National Education Finance national conference, Council Of School Attorneys (COSA), Education Law Center (ELC) national workshops, Federalist Society National Conference, Washington Full Funding Coalition, University of Washington, Washington State Association of Municipal Attorneys (WSAMA), Washington Association of School Administrators (WASA), Washington Association of School Business Officials (WASBO), Washington State School Directors Association (WSSDA), National Education Law Center (ELC), Washington Public Ports Association (WPPA), Association of Washington Housing Authorities (AWHA), Rural Education Coalition (REC), Seattle University; National Association for the Advancement of Colored People (NAACP), Northwest Legal Foundation, and Group Health Foundation.

**SOME STATUTORY RIGHTS LITIGATION EXAMPLES**

- *Jane Doe v. City of Lake Stevens*, (securing Public Records Act TRO, preliminary injunction, & permanent injunction against government agency's publicly releasing photographs of crime victim) (Snohomish County Superior Court)
- *Jane Does v. King County*, (Public Records Act TRO & injunction proceedings to block government agency's publicly releasing full video of Seattle Pacific University shooting victim), 192 Wn.App. 10 (King County Superior Court & Washington Court of Appeals)
- *Jane Doe v. City of Everett, et al.*, (Public Records Act TRO & injunction proceedings to block government agency's publicly releasing cell phone date of Marysville Pilchuck High School shooting witness) (Snohomish County Superior Court & Washington Court of Appeals)
- *Bainbridge Ratepayers Alliance v. City of Bainbridge Island*, (defending validity of city's municipal bonds), 158 Wn.App. 1051, 2010 WL 4962942 (Kitsap County Superior Court & Washington Court of Appeals)
- *Alaska Protein Recovery v.Puretek Corp.* (successfully enforcing arbitration rights under the Federal Arbitration Act), 2014 WL 2011235 (W.D. Wash.)
- *Tacoma Narrows Constructors v. Nippon Steel-Kawada Bridge*, (enforceability of arbitration clause under international treaty), 138 Wn.App. 203, 163 Wn.2d 1011 (Washington Supreme Court, Court of Appeals, & Thurston County Superior Court)
- *1000 Virginia Partnership v. Vertec*, (interpretation & application of construction claim statute), 158 Wn.2d 566 (King County Superior Court & Washington Supreme Court)
- *Ballard Square Condominium Owners v. Dynasty Construction*, (interpretation & application of corporate dissolution statutes), 158 Wn.2d 603 (King County Superior Court & Washington Supreme Court)

- *Wishart, et al. v. Clallam County Housing Authority, et al.*, (defending housing authority against statutory challenge to public housing construction) (Clallam County Superior Court & Washington Court of Appeals)
- *Pierce County Housing Authority v. Washington Utilities and Transportation* Commission*, et al.*, (representing housing authority in overturning Washington Utility & Transportation Commission's statutory interpretation) 86 Wn.App. 138, 131 Wn.2d 1012 (Pierce County Superior Court, Washington Court of Appeals, & Washington Supreme Court)
- *Wright, et al. v. King County, et al.*, (defeating TRO claim against County's land use decision), 77 Wn.App. 1074 (King County Superior Court & Washington Court of Appeals)
- Frequent speaker at legal education seminars / association conferences on statutory rights and obligations, including those under the Public Disclosure Act, Public Records Act & Freedom Of Information Act, Unfunded Mandate statute, Public Bidding & Public Works statutes, and ballot title & initiative certification regulations. E.g., for Law Seminars International, Lorman Education Services, The Seminar Group, Sterling Educational Services, Council Of School Attorneys (COSA), Washington State Association of Municipal Attorneys (WSAMA), Washington Association of School Administrators (WASA), Washington State School Directors Association (WSSDA), Seattle University Law School, and National Association for the Advancement of Colored People (NAACP).

**SOME ELECTION LITIGATION EXAMPLES**

- *In re Special Election on Moses Lake School District No. 61 Proposition 1*, (representing School District in successful defense of voter approved bond measure that passed by 3 votes), 2 Wn.App.2d 689 (Grant County Superior Court & Washington Court of Appeals)
- *Borders, et al. v. King County, et al.* (representing defendant Secretary of State in Republicans' several week trial to overturn the contested 2004 Governor's election that was decided by 133 votes out of over 2.8 million cast) (Chelan County Superior Court)
- *Republican Party* v, *King County, et al.*, (representing defendant Secretary of State in Republicans' emergency injunction action concerning hand recounts in the contested 2004 Governor's election), 153 Wn.2d 220 (Pierce County Superior Court & Washington Supreme Court)
- *McDonald et al. v. Reed, et al.*, (representing defendant Secretary of State in Democrats' expedited Supreme Court suit over hand recounts in the contested 2004 Governor's election),153 Wn.2d 201 (Washington Supreme Court)
- *Republican Party King County, et al.*, (representing defendant Secretary of State in Republicans' emergency weekend TRO action concerning machine recounts in the contested 2004 Governor's election) (W.D.Wash.)

- *In re Coday*, (representing defendant Secretary of State in original jurisdiction Supreme Court action relating to the 2004 Governor's election contest petitions), 156 Wn.2d 485, cert denied, 127 S.Ct. 444 (U.S. Supreme Court & Washington Supreme Court).
- Frequent speaker at legal education seminars / association conferences on election and voting laws including state and federal Voting Rights Acts, Campaign and Public Disclosure Commission compliance, election contests, and vote certification. E.g., for Law Seminars International, Lorman Education Services, Northwest Legal Foundation, Seattle University Law School, Council Of School Attorneys (COSA), Washington State Association of Municipal Attorneys (WSAMA), Washington Association of School Administrators (WASA), and National Association for the Advancement of Colored People (NAACP).

**SOME INSURANCE COVERAGE LITIGATION EXAMPLES**

- *No Boundaries v. Pacific Indemnity Co. [Chubb]* (defeating insurance company's interpretation of its policy's code upgrade coverage), 160 Wn.App. 951 (King County Superior Court & Washington Court of Appeals)
- *Commonwealth Insurance Company v. Grays Harbor County*, (defeating insurance company's interpretation of its policy's code upgrade and earthquake coverage for the historic Grays Harbor Courthouse), 120 Wn.App. 232 (Pacific County Superior Court & Washington Court of Appeals)
- *Pinnacle Realty v. General Security Insurance Company*, (defeating insurance company's interpretation of its policy's coverage for punitive damages), (St. Louis Circuit Court & Missouri Court of Appeals; King County Superior Court & Washington Court of Appeals)
- *Intracorp Real Estate LLC v. USI, et al.*, (representing policyholder in combined insurance policy reformation / broker malpractice action), (King County Superior Court)
- *American Hardware Insurance Group v. West One Automotive*, (defense against insurance company's interpretation of its policy's coverage for employment discrimination), 167 Ore.App. 244 (Klamath County Circuit Court & Oregon Court of Appeals)
- *Wellbrock v. Assurance Company of America*, (representing insurance claimant in wrongful death coverage action), 90 Wn.App. 234 (King County Superior Court & Washington Court of Appeals)
- *Mercer International v. USF&G*, (defeating insurance company's interpretation of its policy's coverage for fire damage to residential complex), 938 F.Supp. 680, 189 3d 473, 1999 WL 594813 (W.D. Wash. & 9th Cir.)
- *McRory v. Catlin Specialty Ins. Co.*, (contesting coverage denial under Directors & Officers policy), 511 Fed.Appx. 632 (W.D. Wash. & 9th Cir.)
- *Wright v. Safeco Ins. Co.*, (contesting coverage denial under property policy), 124 Wn.App. 263 (King County Superior Court & Washington Court of Appeals)

- *Allstate Ins. Co. v. Forest Lynn Homeowners Association*, (contesting coverage denial for rot damage), 914 F.Supp. 408 (W.D. Wash.)
- Frequent speaker at legal education seminars / association conferences on insurance coverage, litigation, and bad faith claims. E.g., for Washington Defense Trial Lawyers (WDTL), Risk Insurance Management Society (RIMS), American Bar Association Tort Trial & Insurance Practice Section (ABA/TIPS), National Business Institute, Lorman Education Services, Law Seminars International, Washington Public Ports Association (WPPA), Association of Washington Housing Authorities (AWHA), The Seminar Group, Sterling Educational Services, Evergreen Rural Water Association (ERWA), Master Builders Association (MBA), Washington State Association of Municipal Attorneys (WSAMA), and Washington Association of School Administrators (WASA).

**SOME CYBERCRIME EXAMPLES**

- After cyber intrusion / malware attack compromised its customer data, represented & advised international cruise line in its data protection/recovery and compliance with the minefield of notification, victim protection, and credit monitoring requirements mandated by the 54 United States jurisdictions and various European jurisdictions impacted. (We are honoring this cyber victim client's desire to remain nameless.)
- After cyber spearfishing attack defrauded it of $6.5 million, represented & advised municipal entity in fully recovering its money with combination of focused insurance claim, banking system freeze, federal remission petition, and FBI coordination. (We are honoring this cyber victim client's desire to remain nameless.)
- After cyber intrusion / cyber spoofing attack defrauded buyer and seller in large commercial transaction of the purchase and sale funds, represented & advised defrauded buyer in defense of lawsuit by seller and counterclaim against that seller to recover buyer's corresponding losses. (We are honoring this cyber victim client's desire to remain nameless.)
- After cyber attack regarding non-profit entity's bank account defrauded it of the bulk of that account, represented & advised defrauded non-profit in fully recovering its money through a combination of threatened litigation, banking regulatory claims, and targeted document/evidence gathering. (We are honoring this cyber victim client's desire to remain nameless.)
- Frequent speaker at legal education seminars / association conferences on cybercrime/cyberfraud prevention, protection, response, and remedies. E.g., for Washington Defense Trial Lawyers (WDTL), Council of School Attorneys (COSA), Washington State Association of Municipal Attorneys (WSAMA), Washington Association of School Administrators (WASA), Washington Association of School Business Officials (WASBO), Washington State School Directors Association (WSSDA), Washington Public Ports Association (WPPA), and Association of Washington Housing Authorities (AWHA).

WASHINGTON STATE BAR ASSOCIATION

# Board of Governors
# Governor At-Large Position
# Candidate Profile Form

## INSTRUCTIONS

*Please complete the below prompts to complete your Candidate Profile form. The information provided in this form will be formatted by WSBA into one pdf. candidate profile document for online WSBA led campaign purposes. This profile form replaces the short biographical statement requirement included in previous application cycles. WSBA may make grammatical and other similar copy edits to be consistent with WSBA's style guide.* ***I RESPECTFULLY REQUIRE THAT BEFORE YOU PUBLICLY ATTRIBUTE ANY WORDS TO ME, YOU FIRST LET ME SEE AND APPROVE ANY EDITS OR CHANGES TO MY SUBMISSIONS. I SAY THAT BECAUSE MY EXPERIENCE HAS BEEN THAT REVISIONS BY THE WSBA GRAMMAR & STYLE FOLKS SOMETIMES SIGNIFICANTLY ALTER MY MESSAGE. I DO NOT GIVE ANY PERMISSION TO ATTACH MY NAME TO EDITS OR CHANGES THAT I DO NOT APPROVE.***

| | |
|---|---|
| **Name:** | Tom Ahearne |
| **Bar Number:** | *14844* |

**Brief Biographical Statement**
**Please tell us a little about you. (50 words max.)**

- Grew up in NM, NJ, CO, DC, CA, VA, IN, IL, TX.
- Seattle litigator since 1986.
- Never felt unwelcomed, excluded, or inequitably treated before 2/11/2014.
- 2/11/2014 accident paralyzed my legs, imprisoning me in a wheelchair.
- Now regularly unwelcomed, excluded, and inequitably treated.
- That sucks.
- But made me a better person.

**What is your understanding of the role of the WSBA Board of Governors and how do you intend to fulfill the role and its obligations? (100 words max.)**

*Technical role:* govern the Washington State Bar Association.

*Most important role (to me):* lead our State – and by example, lead our country – towards fulfilling the promise to which I have pledged my allegiance all my life: one nation, with liberty and justice for all.

**Inclusion**: not many or most people, but all people.

**Equity**: justice not disproportionately amongst us, but equally for all.

**Diversity**: we are one nation, made stronger by our exceptionally diverse perspectives, experiences, origins, and communities.

And to me, effectively implementing our Equity & Justice Plan is critical to fulfilling that leadership role.

**Please share an example of how you've demonstrated your understanding and support of the WSBA mission to *protect the public and the members of the Washington State Bar Association, to ensure the integrity of the legal profession and to champion justice.* (100 words max.)**

One example: my advocacy and lobbying among reluctant WSBA Governors to secure *unanimous* approval of our new Equity & Justice Plan. If we're serious about championing justice *for all*, effectively implementing that Plan is essential.

Another example: my currently working with the Y and Superior Court Judges Association members to expand this coming year's high school mock trial competition to include more kids in marginalized communities – thereby building a better pipeline for kids who never thought of a legal profession career by showing them it's something they can excel at and want to pursue.

WASHINGTON STATE BAR ASSOCIATION

**Board of Governors – Governor At-Large - Application Form**

**All Application materials must be received by 5 p.m. PST on Wednesday, April 15, 2026.**
*Late materials will not be accepted.*

**INSTRUCTIONS**

1. Review all information regarding board service, the application and the election processes online here.
2. Complete this required application form. If you are nominating someone else, ask them to sign it below.
3. Email this signed form and materials to barleaders@wsba.org. Applications must be received by 5 p.m. PST on Wednesday, April 15, 2026. Late applications will not be accepted.

| **Applicant Information** | |
|---|---|
| **Name** | George Fearing |
| **WSBA Bar #** | 12970 |
| **Email Address** | gfearing1024@gmail.com |
| **Phone Number** | 509-378-5415 |

**Candidate for position on the Washington State Bar Association Board of Governors**

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor At-Large.

George Fearing 12970
Name of Candidate (please print) WSBA Bar #

_____
Signature of Nominator (if applicable) WSBA Bar #

George Fearing
Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on April 15, 2026. Filing may be accomplished by emailing the scanned form to barleaders@wsba.org. For questions, please email Manager of Volunteer Engagement Paris Eriksen, at parise@wsba.org.

WASHINGTON STATE BAR ASSOCIATION

**Board of Governors**
**Governor At-Large Position**
**Candidate Profile Form**

**INSTRUCTIONS**

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| | |
|---|---|
| **Name:** | **George Fearing** |
| **Bar Number:** | ***12970*** |

**Brief Biographical Statement**
**Please tell us a little about you. (50 words max.)**

**I am retired from the Court of Appeals, but plan to practice law part time. I joined the court in 2013. Beginning in 1982, I practiced in the same law firm in the Tri-Cities for 31 years. As an appellate judge, I volunteered time as a superior court judge pro tem.**

**What is your understanding of the role of the WSBA Board of Governors and how do you intend to fulfill the role and its obligations? (100 words max.)**

**The role includes setting policies, establishing and overseeing the budget, promoting the profession, setting and upholding standards for the profession, assisting lawyers in need, and advocating for justice for all. I will fulfill these and other obligations by attending each meeting, thoroughly researching issues coming before the board, tirelessly traveling throughout the state to meet with lawyers and local bars, and cooperating with other board members and WSBA staff.**

**Please share an example of how you've demonstrated your understanding and support of the WSBA mission to *protect the public and the members of the Washington State Bar Association, to ensure the integrity of the legal profession and to champion justice.* (100 words max.)**

**I served on the Bar Disciplinary Board from 2001- 2004. I served on the Judicial Conduct Commission from 2013- 2018. In 2023, the Washington State Access to Justice Board awarded me the Access to Justice Leadership award following numerous dissents I wrote identifying racism in the judicial system. I am the Washington Association for Justice 2024 Judge of the Year. In 2006, I ran for the legislature in part to advocate same sex marriage at a time when few politicians of any party supported marriage equality. I operated the Center for Liberty of Conscience, which advocated for church-state separation.**

WASHINGTON STATE BAR ASSOCIATION

# Board of Governors – Governor At-Large - Application Form

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## INSTRUCTIONS

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| Applicant Information | |
|---|---|
| **Name** | Thomas A. Hackett |
| **WSBA Bar #** | 43984 |
| **Email Address** | [redacted] |
| **Phone Number** | 360-975-7770 |

## Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor At-Large.

Thomas A. Hackett — 43984
Name of Candidate (please print) — WSBA Bar #

Signature of Nominator (if applicable) — WSBA Bar #

Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on April 15, 2026. Filing may be accomplished by emailing the scanned form to barleaders@wsba.org. For questions, please email Manager of Volunteer Engagement Paris Eriksen, at parise@wsba.org.

I am a Clark County native and lifelong resident who earned my degrees from Seattle University and the University of Washington. I practice in Washington and Oregon, and I am honored to serve our community through estate planning and probate. The people I help have varied needs — from concerns about long-term care costs and estate taxes, to minor guardianships and protecting the inheritances they leave from divorce. What differentiates me as a lawyer is deeply listening to client needs, and I would bring that same approach to serving on the Board of Governors.

I believe the Board exists to set policy, safeguard ethical standards, and ensure the Bar serves both its members and the public. I believe in holding bad actors accountable while honoring the hard, excellent work that defines all but a few in our profession. Early in my career, I helped a 94-year-old woman whose former attorney was acting against her wishes — revoking a power of attorney, establishing a new one, alerting financial institutions, and securing a protection order. That attorney resigned in lieu of disbarment. That experience crystallized why this work matters, and why I welcome the opportunity to support the important work of our legal profession.

WASHINGTON STATE BAR ASSOCIATION

# Board of Governors
# Governor At-Large Position
# Candidate Profile Form

## INSTRUCTIONS

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| | |
|---|---|
| **Name:** | Thomas A. Hackett |
| **Bar Number:** | *43984* |

**Brief Biographical Statement**
**Please tell us a little about you. (50 words max.)**

**I am a Clark County native and lifelong resident who earned my degrees from Seattle University and the University of Washington. Licensed in Washington and Oregon, I practice estate planning and probate law and welcome the opportunity to support the great work of our legal profession.**

**What is your understanding of the role of the WSBA Board of Governors and how do you intend to fulfill the role and its obligations? (100 words max.)**

**The Board of Governors sets policy, safeguards ethical standards, and ensures the WSBA serves both its members and the public. As Governor at-Large, I would represent the interests of all Washington attorneys by listening, engaging, and bringing a practical perspective shaped by 15 years of practice in Clark County. I believe in balancing the need to hold bad actors accountable while honoring the hard, excellent work that defines all but a few of our profession. I am committed to upholding the integrity and professionalism our legal community deserves.**

**Please share an example of how you've demonstrated your understanding and support of the WSBA mission to *protect the public and the members of the Washington State Bar Association, to ensure the integrity of the legal profession and to champion justice.* (100 words max.)**

**When a 94-year-old Clark County woman's former attorney wouldn't follow her wishes and began acting against her interests, she turned to me. I helped her revoke the existing Power of Attorney, established a new one, alerted financial institutions of the revocation, and ultimately secured a protection order against the offending attorney (my first — and hopefully last). That attorney resigned in lieu of disbarment. This reflects my commitment to the WSBA's mission: protecting the public while holding our profession to the highest ethical standards.**

# WASHINGTON STATE BAR ASSOCIATION

## Board of Governors – Governor At-Large - Application Form

**All Application materials must be received by 5 p.m. PST on ~~Tuesday~~Wednesday, April 15, 2026.**
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| Applicant Information | |
|---|---|
| **Name** | Christal Olivia Irwin, J.D. |
| **WSBA Bar #** | 43924 |
| **Email Address** | JetCityJustice@gmail.com |
| **Phone Number** | [redacted] (cell)/(509) 685-7074 (LL/office) |

### Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor At-Large.

Christal Olivia Irwin, J.D. — 43924
Name of Candidate (please print) — WSBA Bar #

Signature of Nominator (if applicable) — WSBA Bar #

Olivia Irwin jd — 4/15/2026
Signature of Candidate

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# CHRISTAL OLIVIA IRWIN, J.D.

## ATTORNEY -AT -LAW

1331 E. Ivy Ave., Colville, WA 99114• (509) 685-7074

### EDUCATION/CERTIFICATION

**Washington State Bar Association**
(8/2011 – Present)

**Pro Tem Judicial Training**
Washington State Bar Association (2018)

**Juris Doctor,** 2007
University of Washington School of Law
*V. P, Black Law Students Association, 2006-07;*
*Internships with Jeffrey Steinborn, P.S., and the Oakland City Attorney's Office, Advisory Division*

**Bachelor of Arts,** 2000
**Communications, Society & Justice,**
.University of Washington, Seattle

**Associate of Arts,** 1998
Green River Community College,
Auburn, Washington,
*Member, Phi Theta Kappa;*
*President, Black Student Union;*
*Office Assistant, Green River Foundation;*
*News & Public Affairs Director/DJ, KGRG 89.9 FM Radio; Reporter, The Current newspaper*

### CIVICS/VOLUNTEERISM

**Aliance for Equal Justice,** Access to Justice Systems Delivery Subcommittee (2011), Washington WebLawyer Advisory Committee (2015-16)

**Stevens County Bar Association** *(6/2015-1/2018)*
*Law Library Board (9/2015- 10/2017)*

**Seattle League of Women Voters** *(2005-2010) Board of Directors (2008-2009), Ballot Issues Committee (2008), Speakers Bureau (2008-2011)*

**Appointed Opposition,** Seattle Parks and Green Spaces Levy *(2008) and* Seattle City Charter Amendments 17 & 18 (2007)

**Candidate/Treasurer,** City of Seattle Mayor (2001, 2005); Seattle City Council, Position 7 (2003): Ferry County Prosecuting Attorney (2014); Ferry/Stevens/Pend Orielle Superior Court Judge (2016, 2024)

### CAREER HISTORY

*August 2011 – 1/2015, Jan 2024 – Present*
Solo Practioner/Freelance
*Private solo general practice attorney handling all aspects of civil and criminal defense litigation.Full and limited representation,"low bono" civil legal assistance. Civic, public interest, and social justice authorship and advocacy.*

*January 2015 – Dec 2023**
Principal Attorney
**Irwin Law Firm Inc.**
Colville and Republic, Washington
*Criminal Defense and General Practice Civil Litigation; Full and limited representation, unbundled services.*

*April 2004 to October 2005*
Program Assistant II, **Lutheran Community Services,** 433 Minor Avenue, Seattle, Washington.
*Administrative support and adoption archives/relations for Permanency Planning (foster-to-adopt) and Refugee Children's Foster Care Programs.*

*October 2002 to December 2003*
Executive Administrative Assistant, **W. Seattle Psychiatric Hospital/ Highline-West Seattle Mental Health Center,** 2600 S.W. Holden Street, Seattle, Washington. *Administrative Support of Chief Executive Officer, Chief Operations Officer, Quality Officer, and Training Coordinator of dual mental health entities.*

*March - July 2001, January - August 2002:*
Museum Educator,
*February - August 2002*
Aviation Learning Center Design Team Leader,
**Museum of Flight,** 9404 E. Marginal Way S., Seattle, Washington. *Conducted aviation and aerospace education programs for children and youth. Led team of 4-5 aerospace volunteers in development of a 45-minute, computer-based educational workstation on flight dynamics.*

*March 1993 – September 1997:*
Division Assistant II, Planning and Distribution,
**United Way of King County,** 107 Cherry Street, Seattle, Washington. *Administrative support to Director of Community Initiatives, and Human Service Managers to facilitate strategic planning and funding allocation to over 123 human service agencies.*

Governor-at-large Candidate statement:
Christal Olivia Irwin, J.D.
April 15, 2026

I am throwing my hat in the ring for Governor-at-large on the WSBA Board of Governors because I do not fit the mold of a white male "superlawyer." Because, in addition to whatever else I represent, I am one of the hidden minority of litigating attorneys-- who observes and experiences bias in the justice system and other justice issues as more personal than philosophical (or political). Because the WSBA purports to protect attorneys and the public, but does neither effectively. Because there is no end to the committees, task forces and workgroups associated with this organization--yet no one has yet observed how many attorneys it takes to change a lightbulb.

WSBA members already know that an internal "crisis in confidence" preceded the currently perceived broader crisis in "the rule of law." I don't believe the answer is in the words attorneys say upon admission, or in gaslighting the public about their own lived experience with the justice system. I believe that there should be more radical conversation about the nature and function of this organization. I have more than a dozen years of membership and a far longer history of social justice activism to contribute. I am asking for your vote.

WASHINGTON STATE BAR ASSOCIATION

# Board of Governors – Governor At-Large - Application Form

**All Application materials must be received by 5 p.m. PST on Wednesday, April 15, 2026.**
*Late materials will not be accepted.*

## INSTRUCTIONS

1. Review all information regarding board service, the application and the election processes online here.
2. Complete this required application form. If you are nominating someone else, ask them to sign it below.
3. Email this signed form and materials to barleaders@wsba.org. Applications must be received by 5 p.m. PST on Wednesday, April 15, 2026. Late applications will not be accepted.

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| Applicant Information | |
|---|---|
| **Name** | Qian Ying |
| **WSBA Bar #** | 50710 |
| **Email Address** | qying@fdlaws.com |
| **Phone Number** | [redacted] |

## Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor At-Large.

Qian Ying 50710

Name of Candidate (please print) WSBA Bar #

Signature of Nominator (if applicable) DocuSigned by: Qian Ying 357DFEF3FCD54D8... WSBA Bar #

Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on April 15, 2026. Filing may be accomplished by emailing the scanned form to barleaders@wsba.org. For questions, please email Manager of Volunteer Engagement Paris Eriksen, at parise@wsba.org.

## Candidate Statement

**Qian (Sophie) Ying**

As a first-generation immigrant attorney and a working mom, I am not merely an advocate for DEI—I am a direct builder of its outcomes. I bring the 'lived experience' the DEI Council seeks, having founded the Seattle Chinese Bar Association (SCBA) and led it from inception to a thriving non-profit 501(c)(3) with 130+ members. This journey has given me authentic, frontline insights into the systemic challenges facing underrepresented legal professionals.

Our Bar's strength lies in its diverse representation. Currently, solo practitioners and lawyers in small firms (2-5 attorneys) represent nearly half of our membership, yet we remain historically underrepresented in governance. As a solo business attorney, I will be a dedicated voice for this vital majority, ensuring they have the tools—from AI ethics to practice management—to thrive in a changing landscape.

Our Bar's future depends on inclusivity and innovation. If elected, I will champion the interests of solo and small-firm attorneys, ensuring they have the tools—from AI ethics to practice management—to thrive in a changing landscape. I am committed to fostering a culture of belonging that transcends labels and creates real value for all members across Washington. I would be honored to earn your vote.

Sincerely,

Qian Ying

# QIAN (SOPHIE) YING

qying@fdlaws.com

## SUMMARY

Visionary legal leader and business attorney with 15+ years of professional experience. Founder and Immediate Past President of the Seattle Chinese Bar Association (SCBA). Committed to advancing diversity, equity, and inclusion within the legal profession while advocating for the interests and holistic well-being of legal practitioners.

## PROFESSIONAL EXPERIENCE

**Seattle Chinese Bar Association (SCBA)** | **Founder and Immediate Past President** | 2019–2024

- Founded and built a vibrant 501(c)(3) nonprofit organization from the ground up, growing membership to 130+ legal professionals.
- Launched high-impact initiatives, including specialized legal seminars, an annual gala, and a scholarship program supporting law students from underrepresented backgrounds.
- Managed all aspects of nonprofit operations, including strategic planning, budget management, and board recruitment.

**Future Discovery Law Group** | **Attorney at Law** | 2016–Present

- Provide strategic counsel to startups and small businesses, with a focus on company formation, financing, and M&A due diligence.
- Draft and negotiate complex commercial contracts, including equity/asset sale and purchase transactions, for a diverse client base.
- Advise clients on navigating the legal landscape of emerging technologies, including AI-driven business models.

**Shanghai Electric Power Generation Group** | **Cross-border EPC Construction Attorney** | Jun 2010–Apr 2013

- Led legal negotiations for multi-million-dollar EPC power plant projects in India and Poland.
- Identified and assessed legal risks for overseas transactions, including forming subsidiaries in the Middle East and India.
- Conducted international legal training for business groups and resolved complex construction claims on-site in Indonesia.
- Created and maintained a comprehensive contract template library to standardize global operations.

**Fred Hutchinson Cancer Research Center** | **Legal Extern** | Oct 2015–Dec 2015

- Drafted agreements supporting the International Tissue Repository project and researched fundraising regulations in China.

**MultiCare Health System** | **Legal Extern** | Jun 2015–Jul 2015

- Assisted with the internal governance of joint ventures and advised on selecting foreign counsel for international projects.

## EDUCATION

- **Master of Laws (LL.M.)** | University of Washington School of Law, Seattle, WA
- **Master of Laws (LL.M.)** | Shanghai Jiao Tong University, Shanghai, China
- **Bachelor of Law** | Hainan University, Haikou, China
- **Exchange Student** | National Cheng Kung University, Taiwan

## CREDENTIALS & SKILLS

- **Bar Admissions:** Admitted to the Washington State Bar Association, U. S. Federal Court for the Western District of Washington, and the Chinese Bar Association.
- **Certifications:** Certified Information Privacy Professional (CIPP/US); ACE Certified Health Coach.
- **Languages:** Native fluency in Mandarin Chinese; professional fluency in English.

## INTERESTS

Passionate about swimming, skiing, painting, gardening, and whole-food cooking; dedicated advocate for mindful living and nutritional science.

WASHINGTON STATE BAR ASSOCIATION

# Board of Governors
# Governor At-Large Position
# Candidate Profile Form

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**Name:** Qian Ying 50710

**Bar Number:**

**Brief Biographical Statement**
**Please tell us a little about you. (50 words max.)**

**I am a first-generation immigrant attorney, solo practitioner, certified health coach and founder of the SCBA (Seattle Chinese Bar Association). With 15 years of U.S.-China legal experience, I advocate for diversity, innovation, and holistic well-being. I lead with a 'builder's mindset' to ensure every legal professional in Washington feels they belong.**

**What is your understanding of the role of the WSBA Board of Governors and how do you intend to fulfill the role and its obligations? (100 words max.)**

**The Board of Governors provides strategic leadership, policymaking and fiscal oversight for the WSBA, ensuring the legal profession remains inclusive and serves the public interest. As a Governor, I will represent the often-overlooked voices of solo practitioners and small firms and underrepresented communities. I intend to fulfill this role by applying my "builder's mindset"—pioneering ethical AI integration, championing holistic well-being, and fostering a culture of belonging.**

**Please share an example of how you've demonstrated your understanding and support of the WSBA mission to *protect the public and the members of the Washington State Bar Association, to ensure the integrity of the legal profession and to champion justice.* (100 words max.)**

**As the founder of the SCBA, I built a community of 130+ members where I integrated legal education with member well-being. My advocacy centers on the belief that protecting the public begins with supporting the lawyers who serve them—specifically solo practitioners and small firms who provide essential counsel to small businesses. By providing resources for ethical AI integration and holistic health, I ensure attorneys can maintain the highest professional standards while championing justice for their clients and communities.**

## Endorsement of Qian (Sophie) Ying for Governor At-Large

Dear Members of the Selection Committee and the DEI Council:

It is a distinct honor to recommend Qian (Sophie) Ying for the position of Governor At-Large. As the current President of the Seattle Chinese Bar Association (SCBA) and a Senior Corporate Counsel at a multinational technology company. I have had the privilege of knowing Sophie since our time together at the University of Washington School of Law in 2015.

Sophie is a true visionary and a "builder" in every sense of the word. In 2019, when Sophie first shared her vision to establish the SCBA, I was honored to be one of the initial board members. Drawing from my experience in the global consulting and technology sectors, I recognized the immense value of her mission. Sophie invested her own resources, time, and heart into building a professional home for Chinese American lawyers who had long been underrepresented in our state's legal leadership.

WSBA's mission is to seek leaders with "lived experience and knowledge of the needs of members who are historically underrepresented in governance." Sophie doesn't just understand this gap—she has spent the last seven years bridging it. Under her leadership, SCBA grew into a thriving 501(c)(3) organization with over 130 members. Her ability to foster a culture of belonging while maintaining high professional standards is exactly what the Board of Governors needs.

Beyond her organizational achievements, Sophie's character is beyond reproach. She is a person of profound integrity, responsibility, and genuine compassion. Her ability to balance a demanding solo practice focused on AI innovation with her tireless community service is a testament to her extraordinary capacity and dedication.

Sophie has my full and enthusiastic support.

Sincerely,

Sally Shi

President, Seattle Chinese Bar Association

# WASHINGTON STATE BAR ASSOCIATION

## Board of Governors – Governor At-Large - Application Form

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| Applicant Information | |
|---|---|
| **Name** | Faqiha Zahra |
| **WSBA Bar #** | 65150 |
| **Email Address** | Faqiha@live.com |
| **Phone Number** | 801-857-6570 |

### Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor At-Large.

Faqiha Zahra — 65150
Name of Candidate (please print) — WSBA Bar #

Signature of Nominator (if applicable) — WSBA Bar #

Faqiha Zahra
Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on April 15, 2026. Filing may be accomplished by emailing the scanned form to barleaders@wsba.org. For questions, please email Manager of Volunteer Engagement Paris Eriksen, at parise@wsba.org.

I am seeking to serve as a Governor-at-Large to contribute my experience in regulated environments where public trust, institutional accountability, and sound governance are essential. In my professional role at a regulated electric utility, I work on rate-making and regulatory proceedings and am accountable to state and federal commissions. This work requires balancing legal obligations, transparency, fiscal responsibility, and long-term public impacts affecting customers and communities.

My legal training and professional experience in energy, environmental, and regulatory law have shaped a systems-based approach to decision-making that values collaboration, careful deliberation, and respect for institutional processes. I routinely engage with complex records, diverse stakeholders, and policy questions that require independent judgment, and I emphasize collaborative engagement across perspectives to support effective institutional decision-making.

As a member of the Washington State Bar, I am committed to supporting the integrity of the profession, strengthening access to justice, and ensuring that governance reflects the diverse experiences within the Bar. If selected, I would bring a thoughtful, diligent, and service-oriented perspective to the Board's work, with a focus on collaboration among Governors, staff, and members of the Bar, transparent governance, public confidence, and the long-term health of Washington's legal community.

# FAQIHA ZAHRA

2552 E Newcastle Dr,
Sandy, UT, 84093

Ph: (801) 857-6570
E-mail: faqiha@live.com

## WORK EXPERIENCE

**PacifiCorp (Berkshire Hathaway)**
*Environmental & Energy Resource Manager, April 5, 2023—Present*
*Salt Lake City, Utah, USA*

- Advise the Vice President and Senior Vice President on regulatory, commercial, and enterprise risk implications of fuel supply and reliability-related operational decisions across the Western Interconnection; lead development of supporting testimony and workpapers.
- Represent the company's position in multi-state regulatory forums and stakeholder discussions across the Western Interconnection, coordinating cross-functional input to align regulatory strategy with enterprise risk management and reliability objectives.
- Advise executive leadership on policy, regulatory, and stakeholder implications of regional reliability trends and market volatility, and develop executive-level briefings and external-facing presentations for regulatory, industry, and internal executive audiences.
- Lead negotiation and regulatory review of coal supply agreements to manage fuel price volatility, supply risk, and cost-recovery exposure across multiple jurisdictions.

**Public Service Commission of Utah (PSC)**
*Legal Assistant, April 15, 2019—April 4, 2023*
*Salt Lake City, Utah, USA*

- Supported Commission Secretary and technical staff on rate cases, tariff filings, and docket management, ensuring procedural accuracy and statutory compliance.
- Provided legal guidance to utilities and municipalities consistent with Utah administrative rules and statutes.
- Drafted and issued formal legal orders, public notices, and correspondence on behalf of the Commission.
- Authored the 2019 PSC Annual Report summarizing activities and priorities.
- Supported administrative law judges during hearings for open dockets; prepared legal documents, case materials, and procedural records.

**Tesla Inc. - Energy Operations**
*Utilities Specialist, March 2018—December 2018*
*Draper, Utah, USA*

- Led multi-state residential solar initiatives, ensuring legal and regulatory compliance aligned with state standards.
- Liaised with state regulatory agencies to secure customer eligibility for tax credits and rebates.

**Willdan Energy Solutions**
*Associate Program Manager, September 2017—March 2018*
*Salt Lake City, Utah, USA*

- Supported large-scale smart lighting retrofit projects across Intermountain Healthcare facilities to improve energy efficiency and performance.
- Consolidated site-level data and produced recurring performance reports covering labor, materials, and project progress.

- Supported launch of Utah's first Small Business Direct Program (SBDP); coordinated permitting across UT, WY, and ID.

**BERC Innovative Solutions (B.I.S.) Energy and Resources Consulting Program, Berkeley**
*Product Marketing & Development Researcher, January 2017—May 2017*
*Berkeley, CA, USA*

- Developed business plans and marketing strategies for Pyro-E smart sensor technology for urban mobility.
- Conducted traffic congestion analyses; collaborated with four researchers to produce weekly reports.
- Delivered weekly presentations to the CEO; translating complex findings into strategic recommendations.
- Drafted internal memos outlining cost-effective marketing and product development approaches.

## EDUCATION

**Masters of Law (LL.M) with Honors – University of California, Berkeley**
*Specializations: Energy law & Clean Technology, Environmental law & Policy*
*(Asia-Pacific Scholarship Recipient August 2016-May 2017)*

- **Projects:**
- *Environmental Law Clinic-(CLEE)*:
- Drafted a memorandum for the Director of the California Governor's office of Planning and Research (Ken Alex) analyzing implementation opportunities and barriers related to the Under2 MOU initiative across sub-national governments.
- *Environmental Law & Policy Thesis*:
- Authored an in-depth published research paper titled "How far can the Paris Agreement take Asia" that presented a thorough analysis of the International Paris Agreement and its effects on signatory Asian countries like Pakistan, China, and India.

**University of London, U.K.**
*Hons. Bachelor of Law (LL. B), July 2014*

- **Coursework:** Contract Law, Administrative Law, Tort Law, Common Law, Criminal Law, Land Law, Jurisprudence, International Human Rights Law, Public Law, E.U. Law and Policy, and Islamic Law.
- **Extra-Curricular:** Winner Law Moot Court Competition (2014), Member of the Student Law Society; Teacher's Assistant for Public International Law (2013); Member of the University of London's legal debating society (2012-2014).

## EXPERTISE

- Regulatory compliance and risk analysis in highly regulated energy markets
- Cross-functional coordination across legal, commercial, finance, and operations teams
- Executive-level briefing, regulatory strategy development, and testimony support
- Fuel supply, cost recovery, and market volatility risk management
- Data analysis and regulatory reporting (Excel; technical workpapers and exhibits)
- Process improvement and operational efficiency (Lean Six Sigma Green Belt)
- Selected for the Rising Leadership Series, Women's Leadership Institute
- **ADDITIONAL INFORMATION**
- **Languages:** English (Fluent); Urdu (native); Punjabi (fluent); Hindi (conversational)
- **State Bar Admissions:**
- Missouri State Bar – Active
- Washington State Bar– Active

WASHINGTON STATE BAR ASSOCIATION

# Board of Governors
# Governor At-Large Position
# Candidate Profile Form

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| | |
|---|---|
| **Name:** | Faqiha Zahra |
| **Bar Number:** | 65150 |

**Brief Biographical Statement**
**Please tell us a little about you. (50 words max.)**

Faqiha Zahra is an attorney with experience in regulatory, energy, and environmental law, currently advising on complex governance and policy matters in regulated utility settings. She holds advanced legal training in energy and environmental law and brings a public-interest perspective shaped by multi-jurisdictional practice.

**What is your understanding of the role of the WSBA Board of Governors and how do you intend to fulfill the role and its obligations? (100 words max.)**

The WSBA Board of Governors is responsible for setting the Association's strategic direction, ensuring sound policy and fiscal oversight, and safeguarding the integrity of the legal profession. The Board must balance member interests, public accountability, and access to justice while maintaining confidence in the rule of law. If selected, I would fulfill these responsibilities by engaging thoughtfully in governance deliberations, applying a regulatory and systems-based perspective, and contributing to transparent, collaborative decision-making that reflects the diverse needs of Washington's legal community.

**Please share an example of how you've demonstrated your understanding and support of the WSBA mission to *protect the public and the members of the Washington State Bar Association, to ensure the integrity of the legal profession and to champion justice.* (100 words max.)**

In my professional role at a regulated electric utility, I work on rate-making and regulatory proceedings and am accountable to state and federal commissions. I advise on matters involving regulatory compliance, risk oversight, and long-term policy decisions that directly affect customers, communities, and essential public services. This work requires transparency, ethical judgment, and respect for institutional processes. Through this experience, I have developed a strong commitment to public trust, accountable governance, and decision-making that balances legal obligations, fairness, and the broader public interest.

**Faqiha Zahra Written Response:**

Q: Can you share about your lived experience and knowledge of the needs of members who have been historically underrepresented in governance at WSBA?

A: I bring perspective shaped by working across legal and institutional systems where pathways are not always designed with all participants in mind. That experience has informed my awareness that governance decisions can unintentionally exclude members who lack access, familiarity, or visibility. I would bring a consistent focus on accessibility, transparency, and inclusion in how policies affect the full WSBA membership.

Q: What is your understanding of the purpose of the Member At-Large role and how do you intend to fulfill the obligation of the role?

A: The Member At-Large role exists to ensure that Board deliberations reflect perspectives beyond geographic representation. The role supports inclusive governance by elevating considerations that may otherwise be overlooked. I would fulfill the role fully as a participating governor, while continually assessing whether Board decisions serve the breadth of member experiences they are intended to reach.

Q: General Rule 12.2 provides that the WSBA should strive to promote diversity and equality in the legal profession and courts. How do you think the Board of Governors should carry out this responsibility under 12.2?

A: General Rule 12.2 requires the Board to integrate diversity and equality into its core governance functions. Carrying out this responsibility means routinely assessing whether WSBA rules, programs, and decisions promote equity in their design and implementation, within the Board's regulatory and fiduciary responsibilities. The focus should remain on measurable outcomes and member accessibility, rather than solely on aspirational statements or stated intent.

Q: The WSBA Board of Governors approved the new WSBA Equity and Justice Plan in May 2025. How will your experience and knowledge help the Bar advance the Plan?

A: Advancing the Equity and Justice Plan depends on sustained integration into the Board's ongoing work. From a governance standpoint, this requires continuity, accountability, and regular oversight to ensure the Plan informs decision-making. I would support keeping equity considerations embedded in Board deliberations, so the Plan operates as a living framework guiding action over time.