

# WASHINGTON STATE BAR ASSOCIATION

## Small Town and Rural Committee

**Small Town and Rural Committee Meeting I Virtual Only**

**Wednesday, April 17, 2024, | 12:10 p.m. – 1:10 p.m.**

Via [Zoom](#) | Meeting ID: **815 7000 4025** | Passcode: **684632** | Call-in: **888-788-0099**

## AGENDA

1. Introductions and Approval of March Meeting Minutes (Gov. Kari Petrasek)
2. WSBA Updates (Gov. Petrasek and Julianne Unite)
3. Subcommittee Report Updates, if any (Subcommittee chairs Laurie Powers, Gov. Petrasek, Betsy Penoyar)
4. Project Team Updates
  - a. Job Fair at Gonzaga (Laurie Powers)
  - b. Summit Project Team (Laurie Powers)
  - c. Rural Day of Service (Kathryn Burke, Kari Petrasek)
5. FY25 Budget Discussion (Kari Petrasek, Julianne Unite)
6. Announcements
7. Next Steps/Conclusion
8. Next Meeting: May 22, 2024
9. Adjournment

# WASHINGTON STATE BAR ASSOCIATION

## Small Town and Rural Committee Charter

Effective: July 16, 2021  
as approved by the  
WSBA Board of  
Governors

### ***Purpose***

The WSBA Small Town and Rural (STAR) Committee is committed to strengthen and support the practice of law in the rural communities throughout Washington state. Members of the STAR Committee will work to ensure that the practice of law in rural communities is present, growing, and thriving.

Practitioners in rural communities are few and far between. Additionally, many of these practitioners are nearing retirement without a clear plan of succession for their clients, leaving a void of access to legal representation and counsel. The STAR Committee will guide policy & program development, serves as ambassadors between the WSBA and these communities, explore and advocate for creative and innovative solutions, and regularly assess the legal landscape in rural communities to determine if WSBA policy, advocacy and program development require further resource for sustainability and improvements.

The STAR Committee aligns with the authorized activities outlined in General Rule 12. More specifically, GR 12.1 (a) articulates the Washington Supreme Court’s regulatory objective to provide, in part, “meaningful access to justice. . .” while GR 12.1(d) strives for “affordable and accessible legal services.” In addition, the STAR Committee aligns with the authorized activities outlined in GR 12.2, in particular by providing “services to members and the public,” and “fostering collegiality among its members and goodwill between the legal profession and the public.”

Further, the STAR Committee furthers the WSBA mission to serve the public and the members of the Bar by providing focused attention on the unique needs of residents and members in rural areas both by improving access to legal practitioners in rural communities and outreach and development of a pipeline of younger rural residents to pursue a legal career and serve their communities.

### ***Definition of “Rural”***

For the purpose of the STAR Committee and reflective of Washington’s unique geographic and socio-geographic landscape, the definition of “rural” is as follows:

Based on the definitions produced by the U.S. Department of Agriculture Economic Research Service (ERS) and an overview of Washington county population, we focused on counties with populations of less than 50,000 and more than 2,500. These areas are considered ‘urban non-metro areas not part of larger labor markets’ by ERS. As part of the working definition, and for ease, we have termed these counties as ‘rural.’ Based upon WA county population data, we’ve pursued a hypothesis that counties with 30,000 or more as rural, but likely more

adjacent to a labor market and perhaps have a varying set of circumstances that may differ from counties that are less than 30,000.

### **Composition**

Members of the STAR Committee should have demonstrated experience and/or interest in a thriving legal practice in Washington's rural communities. The STAR Committee will consist of 13 members and are outlined as:

- Chair (voting member)
- 2 Current or Former WSBA Board of Governors Members (voting members)
- 1 Active WSBA Member At Large (voting member)
- 4 Active WSBA Members from rural communities - see above for definition of "rural" (voting members)
- 1 Active WSBA Young Lawyer Member, as defined in WSBA Bylaws (voting member)
- 3 Law School Representatives (voting members, must be currently employed with a WA Law School which is not currently represented on the Committee.)
- 1 Active WSBA Lawyer Member currently employed with a Qualified Legal Service Provider (QLSP)(voting member).

WSBA Staff Liaison: Member Services and Engagement Manager or staff member in the Advancement Department, non-voting

Board of Governor Liaison: as assigned annually, non-voting.

### **Terms**

- Chair: two-year term
- Members: three-year term

### **Initial Committee Terms**

The first appointments to the STAR Committee should effectuate a staggered rotation of STAR Committee members. Therefore, the following terms are in place for the first appointment cycle only. All subsequent terms should adhere to the term limits stated above. STAR Committee member serving an initial term less than three years, should be considered an incomplete term. Therefore, the member is eligible to serve two subsequent complete three-year terms in WSBA Bylaws.

- 2 Active WSBA Members  
*1 member with two-year term, 1 member with three-year term.*
- 4 Active WSBA Members from rural communities (see above for definition)  
*1 member with one-year term, 1 member with two years term, 2 members with three-years term.*
- 3 Law School Representatives (voting, must be currently employed with a WA Law School)
- *1 member with one-year term, 1 member with two-years term, 1 member with three-years term.*

The following positions will begin as a standard term as set forth in this charter.

- Chair
- 1 Active WSBA Young Lawyer Member

- 1 Active WSBA Lawyer Member currently employed with a Qualified Legal Service Provider (QLSP).

### ***Scope of Work***

The scope of the STAR Committee’s work will focus on what the WSBA is uniquely positioned to do in supporting a sustaining and thriving environment for the practice of law in Washington’s rural communities. The STAR Committee will work with all relevant and interested stakeholders to collaborate where needed. The provision of direct legal services and civil legal aid to the public is outside the scope of the STAR Committee.

### ***Measures of Success***

- Increased awareness of the issues and possible solutions to address any gap in practicing members in rural communities.
- A sustainable pipeline of legal practitioners in rural communities.
- Increased numbers of legal practitioners in rural communities.
- The establishment of funding for programs and initiatives for the practice of law in rural communities.

### ***STAR Committee Roles***

#### **1. Community Education and Outreach**

Coordinated efforts to educate members and potential members about the unique needs, opportunities and benefits of a rural practice. This can include, but should not be limited to, comprehensive information on WSBA’s website, features in WSBA publications, presentations at high schools, law schools and community colleges. Meetings and events, such as a summit or symposium, to highlight the issue, convene interested stakeholders to share their concerns and strategize on possible solutions.

#### **2. Pipeline and Placement Program(s)**

Develop WSBA programming, or WSBA supported/partnered programming designed to build a pipeline of practitioners in rural areas as well as an incentive program to encourage members to explore a rural practice on a time-limited or multi-year timeframe. This role should explore a possible collaboration or strategic overlap with WSBA existing and future mentorship program(s). In particular, this role will require extensive strategic planning and identification of external stakeholder support and additional funding sources. Coordinate with law schools and other stakeholders regarding economic incentives to practice in rural areas.

#### **3. Job Opportunities and Clearinghouse**

Utilize existing and future WSBA resources to support and highlight job opportunities in rural communities. This role should include making it easier, and perhaps more cost-effective, to add job postings to WSBA’s service. Develop a clearing house to assist retiring members with succession planning and the buying/selling of a practice.

### ***Committee Evaluation***

The STAR Committee should conduct an assessment within five years from the date of Board of Governors' approval by 1) conducting a survey of rural practitioners to provide stakeholder feedback regarding the impact of this Committee to effectuate change in these areas, 2) assessing the scope of work to reflect impact and progress in this area and align with trends in the greater legal community, and 3) earnestly examining if the Committee is necessary to continue the scope of work.

# WASHINGTON STATE BAR ASSOCIATION

## Small Town and Rural Committee

### Small Town and Rural Committee Meeting Minutes

Wednesday, March 20, 2024 | 12:12 p.m. – 1:12 p.m.

*Virtual meeting via Zoom*

**Committee Members Present:** Ashley Cummins, Elizabeth Penoyar, Erin Fullner, Jesse Lamp, Governor Kari Petrasek, Judge Kathryn Burke, Laurie Powers, Merf Ehman, Rusty McGuire

**Committee Members Absent:** Hunter Abell (unexcused), Sunitha Anjilvel (excused), Zachary Bryant (unexcused)

**WSBA Staff Present:** Julianne Unite, Kevin Plachy, Chelle Gegax

**WSBA Board of Governors Liaisons Present:** Matthew Dresden

**Public Attendees Present:** Sophia Byrd McSherry, Michael Chin

## Introductions and Approval of February Meeting Minutes (Gov. Kari Petrasek)

Governor Kari Petrasek called the meeting to order at 12:12 p.m. Kari acknowledged that there are no first-time attendees at today's meeting. WSBA Member Services and Engagement Manager, Julianne Unite, advised of correction on the agenda and that the committee would be approving the February meeting minutes, not January as indicated. On motion by STAR Committee Member, Rusty McGuire, seconded by committee member, Merf Ehman, by unanimous vote (9-0-0) the committee approved the February meeting minutes.

## WSBA Updates (Gov. Petrasek and Julianne Unite)

Kari advised of the March Board of Governors meeting which took place at Gonzaga. Kari reported that the Next Generation Bar Licensure Task Force was passed by the Supreme Court and will be implemented by 2024. The BOG passed the Council on Public Defense on Case Load Limits Recommendations, and it is now in the Supreme Courts hands to modify, except, or otherwise. Kari invited Julianne and/or BOG Liaison Matthew Dresden to provide additional updates.

Julianne advised that applications for open committee volunteer positions will open May 1, 2024, which is a shift from past timelines. There will be eight seats coming open on the STAR committee for the term beginning October 1, 2024. The positions coming available are Chair, both BOG positions, two rural member positions (currently held by STAR Committee Member Elizabeth Penoyar, and Rusty McGuire; both would need to reapply to continue as committee members), Young Lawyer Member ( currently held by STAR Committee Member Zachary Bryant), Qualified Legal Service Provider (currently held by STAR Committee Member Merf Ehman), and the University of Washington representative position (currently held by Erin Llyod). All positions are a three-year term, except for the position of Chair, which is a two-year term. The WSBA is currently working through budget season and planning for Fiscal Year 2025. A more in-depth discussion is slated later in the agenda for this topic. Matthew advised that the legal tech

task force is accepting applications until March 27 and is encouraging applicants from outside of the King County metro area to apply. Kari advised on a member status workgroup was formed with quick turnaround for presentation at the BOG in September. Additional information can be found in the WSBA Take Note publication coming out on March 21, 2024. This will address member status's such as resigned vs. retired and will request feedback from members on adding an additional status for retirees.

## Subcommittee Report Updates, if any (Subcommittee chairs Laurie Powers, Gov. Petrasek, Betsy Penoyar

None.

## Project Team Updates

### Job Fair at Gonzaga (Laurie Powers)

STAR Committee Member Laurie Powers advised that the job fair would take place on April 5<sup>th</sup>, 2024. Currently there are 20 employers; nine of which have received applications. Laurie stated that there are a lot of post graduate jobs, and some internships. Any employers who did not receive pre-applications will be approached to attend the afternoon drop in job fair session and Laurie plans to drive students to attend that following the scheduled interviews. Kari asked if the afternoon session may include more employers offering internship opportunities? Laurie responded that she was unaware of what employers would be offering. Ashley asked if it was too late for students to register for the drop-in session; Laurie responded no, this is still available.

### Summit Project Team (Laurie Powers)

Laurie advised that the Rural Summit would take place on June 7<sup>th</sup>. Laurie advised that Chief Justice Gonzales would be the morning speaker, and Junior Cuevas would be facilitating a panel. The remainder of the sessions are coming together through various committee members involvements. Laurie has sent a rough draft of the registration documents to WSBA Advancement Director, Kevin Plachy, and Merf for review. Kevin is currently working on sponsorships. Kevin commented that the WSBA is on track to post this event to CLE store before April 1, 2024. WSBA is working internally to set up 3 e-blasts to promote the summit at various timings before the event: 8-9 weeks, midpoint and one week prior. Kevin stated that he is working on finalizing sponsorships with a few entities, and that the following sponsorships have been confirmed: WSBA Solo & Small Practice Section, and Petrasek Law, LLC. Inquiries have been sent to: Rusty's foundation, Umpqua Bank, Hunters firm. Aq-west has inquired and Laurie and/or Kevin will be in further contact. Kevin advised that they are currently estimating 5.25 CLE credits, which is great for a \$30 registration fee. Laurie asked about accrediting presentations from Judge Mendoza and Justice Gonzales; Kevin advised that we need materials supplied by the presenters to apply for credit. Laurie will follow up with them regarding materials. Erin commented that she has someone from Yakima Nation Office of Legal Counsel that could potentially present.

### Expenses & Reimbursements (Julianne Unite)

Kari advised that committee members will be able to receive reimbursement for one night lodging, roundtrip mileage or airfare (whichever is less), per diem rate for meals June 6 and 7, and related transportation to/from hotel to Gonzaga for those that are not local. Please reach out to Julianne with any additional questions. Julianne advised that we currently do not have a room block for this event but

can investigate that as an option closer to when it is identified how many committee members would be attending. Julianne advised that the anticipated expenses for reimbursement for the entire committee to attend was just under \$10,000. The budget for the event, inclusive of venue, was \$10,000.

Reimbursement costs do not include sponsorships currently. Laurie asked if we should have a room block for presenter and/or faculty for the event? Kevin advised that this should be taken into consideration and that Julianne and WSBA Member Services and Engagement Administrative Assistant, Chelle Gegax, can investigate this closer to the event date. Kari suggested that attendees might consider carpooling to save on transportation costs.

## Rural Day of Service (Kathryn Burke, Kari Petrusek)

STAR Committee Member, Kathryn (Katie) Burke, advised that based on ongoing conversations, the committee must be partnered with a qualified legal service provider to complete a Rural Day of Service. Katie asked the committee what would the committee be bringing to the table that the QSP's aren't already doing? Kevin advised that the committee and WSBA would support day of, and volunteer recruitment options. Kevin suggested that the committee could also provide a short CLE prior to the day of service and advised that the WSBA Communications Department could provide targeted communications and narrow down audiences by practice area types and/or community size. Katie asked if the committee was anticipating this to take place in her area as she has been the one doing majority of the planning. Mike Chin suggested looking into having virtual consultations where lawyers can connect with clients to address clients who cannot travel to more populated areas to receive legal services. Katie responded that this is not something that has been discussed but would be happy to explore this moving forward. There was concern that those needing services may not be able to access internet. Kari suggested having committee members agree to visit their QSP's to provide services on a regular basis. Katie asked if this truly met the goals of the committee. Kevin responded that he felt it was not meeting the goals of the committee. STAR Committee Member, Jesse Lamp, commented that he is in Colville and does not have a lot of pro bono opportunities unless they are virtual. The closest place for him to do in person pro bono work is approximately three hours away. Kevin commented on reimbursement of expenses for committee members that are traveling to an in-person location. Kevin also stated that we would want to align with a QSP in rural communities to best support local needs. Jesse commented that reaching out to local bar associations as a statewide organization and ask them if they have considered anything like the rural day of service, and if so, how can the committee support them in making this type of event available. Mike suggested in the chat that the committee may want to consider partnering with non-legal community organizations in the area who are trusted community partners. Katie asked follow up questions regarding the reimbursement of volunteers for this event, as there is not anything dedicated to as of right now. Kevin advised that there were likely funds available in the budget, but if there were not, we may have the opportunity to reallocate funds from elsewhere with the involvement of the WSBA Executive Director. Katie asked for committee feedback on how to move forward. Kari advised she thought that it could be a phone or virtual visit may attract more volunteers. Kari advised that she runs a quarterly will clinic with an hour-long appointment, which produces a simple will and other documents. Katie asked if this could be amendable to virtual sessions? Kari commented that the challenge would be having clients find their own notary and witness to finalize their documents. Kevin commented on focusing on communities that have existing connections. Katie advised that she'd focus on planning for in person in Ferry County for the first time this event takes place.



## Summer Internship Grant Selection Volunteers (Kari Petrasek)

Kari advised that she met with Law Student Liaisons, and Kevin met to discuss summer internship grant application procedure. Kevin is working on an approval from the WSBA and hoping to have that done by this the end of this week. A notification will be sent to law students to apply, and that the application deadline is April 22, 2024. If awarded the grant, they would receive the \$5,000 grant and be required to work full time with an employer at a minimum of 30 hours per week. The final review of applications and nominations of who should receive the grant will take place at the May STAR committee meeting. Kari is requesting two volunteers to work with her to review applications and produce nominees and will meet the week of April 29. A special meeting for the STAR Committee will be set for early May to vote on nominations. Laurie advised that the law school reps felt that they should not be involved as they have a conflict of interest with students. Rusty and Jesse volunteered to join Kari to review. As apps come in, WSBA Staff will circulate to the nomination reviews. Kari asked if applications could be reviewed using a box account. Julianne asked if the documents can be reviewed and shared through WSBA Community. All would be able to review, however only those on the review team could provide their comments. Julianne confirmed that WSBA Community is only accessible to STAR Committee members. Julianne also advised that some applicants for other WSBA application types have been redacted. This is not a requirement but is something to consider as to mitigate any implicit biases. This can be decided upon later once application process is approved and finalized.

## FY25 Budget (Julianne Unite)

Julianne advised first draft of budget must be submitted no later than April 8<sup>th</sup>. Julianne provided draft placeholder with no adjustments. Julianne asked the committee to consider what other projects may be on the table or up for consideration. If other committee members have ideas to please communicate those to Kari and she can meet with Julianne offline to discuss. Please provide any kind of budget numbers or anticipated costs. Merf commented that they felt an award/scholarship to law schools would be beneficial in encouraging and awarding student involvement in rural areas. Kari asked what cadence the rural summit was intended to be continued on; annual, biannual? Laurie advised that would depend on o the results of this year's event and that to keep in mind that they are limited to max capacity of 200 at the law school. Kari advised she had some suggestions and would reach out to Julianne offline. Kari asked that the draft budget be circulated to the full committee for review and comments and will post in community for review.

## Announcements

## Next Steps/Conclusion

Next Meeting: April 17, 2024

## Adjournment

Adjourned at 1:12 p.m.

# WSBA CALL TO DUTY



# DAY OF SERVICE MANUAL



**WASHINGTON STATE**  
BAR ASSOCIATION

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Support for the Call to Duty Day of Service is provided by the Washington State Bar Foundation, which funds programs that inspire the legal profession to fulfill its ideals of service and inclusivity in service of the public.

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# Overview

## WSBA Call to Duty

The Call to Duty Initiative was created to inform, inspire, and involve Washington lawyers in serving veterans. There are almost 600,000 veterans in our state. Many veterans, are facing distinct barriers to successful reintegration into civilian life.

The Call to Duty Initiative includes the Call to Duty Pledge where legal professionals “pledge” to help veterans with their legal issues and the Day of Service.

## Day of Service

As of March 2017, we have held five Days of Service (DofS): Four days in the Tacoma area and one in Seattle. WSBA partnered with the Tacoma-Pierce County Bar Association Volunteer Legal Program and the King County Bar Association to hold these programs.

Each day has engaged approximately 40-60 legal professionals and assisted 15-30 clients.

### A Commitment to Inclusion

The Washington State Bar Association is committed to advancing diversity and inclusion within the legal profession. Toward that end, WSBA is committed to understanding and responding to the professional environment which exists for all lawyers in Washington. Inclusion is best understood as an environment which encourages and incorporates different perspectives, ideas, and experiences. The legal profession is changing. The business interests of attorneys, employers, and clients call for more diverse and equitable legal representation across the state. WSBA recognizes the need to enhance opportunity in the legal profession and the public’s experience with lawyers by demonstrating to its members and the public at large a genuine commitment to supporting and advancing diversity, equity and inclusion.

WSBA is dedicated to living out this commitment to equity and inclusion in all programs, including the Day of Service. Partners need to look for and facilitate opportunities for inclusion of clients and volunteers from various underrepresented backgrounds including:

- Cultural/Racial
- Generational
- Gender
- Sexual Orientation
- Disability/impairment
- Area of Practice

For assistance or for more information, please contact the WSBA Diversity and Public Service Programs Manager, K. Joy Williams at [joyw@wsba.org](mailto:joyw@wsba.org).

## Agenda

**The DofS is based on a service learning model and includes three parts:**

1. A morning CLE seminar on an identified high priority civil legal need with two tracks. With the fourth DofS (Tacoma – September 2016), we initiated a few changes:
  - The first three included a cultural competency session that was dropped for the fourth because it was starting to be repetitive for many of the volunteers.
  - The first three had one track on the basics of Parenting Plan Residential Schedules and the second on the basics of Child Support Worksheets. On the fourth day, both tracks discussed the same issue at different levels – beginning and experienced. That way someone who had 30 years+ experience in family law did not have to attend a basics course. This was well received.
2. The Partner hosts a workshop for clients outlining their rights, additional resources and expectations for the afternoon.
3. A hands-on clinic in which legal professionals provide assistance *pro bono* to veterans. The clinic focused on the issues discussed in the morning CLE. Again, with the fourth DofS (Tacoma – September 2016), we initiated a change:
  - The first three assumed the legal professional knew very little (if anything) more than what the CLE provided. Two professionals were paired up and could go to “mentor stations” if they got stuck on a particular issue. The fourth day paired a more experienced and a less experienced professional with no mentor stations. This was well received.

**Important Note:** All pairs **must** include at least one lawyer so legal advice can be given. A non-lawyer can only help with the issue but cannot provide actual legal advice.

## Budget

The grant WSBA provides is for \$2,500 (for FY 16 and previous). In Fiscal Year 2017, we increased the grant to \$3,000. The grant covers the following Partner expenses:

- Facility Rental
- Volunteer malpractice insurance coverage (if there is an additional cost)
- Staff intake & day of legal clinic costs
- Printing of CLE materials
- Printing of Workshop materials
- Client’s Flash drives

The WSBA budget line item “Public Service Events and Projects” covers all other expenses, specifically:

- Food
- Faculty Expenses

# Responsibilities

## WSBA:

- Provide staffing for CLE
- Order food
- Coordinate CLE materials, including collecting, compiling and providing link to volunteers
- Create client recruitment flyer & other promotional materials
- Create volunteer recruitment materials
- Coordinate volunteer recruitment registration
- Partner the volunteers together for the clinic and prepare volunteers
- CLE reporting
- Volunteer evaluations

## Partner:

- Provide staff/volunteers for the registration and the legal clinic
- Provide staff/volunteers for childcare during workshop and legal clinic
- Coordinate workshop materials, including collecting, compiling and printing
- Upload all workshop and clinic materials to client flash drives
- Host the workshop for Clients
- Purchase flash drives
- Provide an “intake summary” that includes the information gathered at intake. This summary will be provided to volunteers at lunch so they may prepare a little before seeing the client.
- Develop client/attorney agreement forms for the clinic
- Conduct day of pre and post client evaluations
- Provide malpractice insurance for the legal clinic
- Provide client screening to ensure that the client’s needs matches the Day of Service topic, is a veteran, and falls within the 0-400% of the Federal Poverty Level.

## Both:

- Conduct site visit prior to securing a space
- Promote to veterans
- Promote to volunteers
- Meet regularly (timing TBD by WSBA & Partner)
- Communicate

## Volunteers (see full description for more details)

- Legal professionals, including attorneys, LLLTs, paralegals etc.
- Can be new or experienced to practice area
- Attend the morning CLE and assist at least one client in the afternoon

### Volunteer Credit

Volunteers receive credit for the full day. Lawyers receive Law & Legal Procedure credits for the morning CLE and Pro Bono credits for the afternoon clinic. As with other CLEs, WSBA applies for and reports credits for the morning CLE. Volunteers report their own pro bono credits per MCLE procedures.

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# Volunteer Job Description

## Job Title: Legal Clinic Volunteer

**Purpose:** The Day of Service is legal clinic focused on providing legal service to veterans and their families. You will be paired with another volunteer to provide advice, consultation and limited legal assistance. You do not need to be experienced in the chosen area.

The Day of Service begins with a free CLE seminar on effectively working with veterans on the chosen legal issue. Volunteers attend either the beginner or experienced track. After the CLE, volunteer pairs participate in a two-hour afternoon legal clinic to put their skills to use.

WSBA will pair volunteers in advance and will include at least one attorney, and wherever possible, one experienced professional (3 or more years working with the chosen area) and one less experienced professional (2 or less years working with the chosen area).

### Location:

#### Key Responsibilities:

- Attend a free CLE in the morning
- Provide free legal services to a veteran, military personal or their family/caregiver

#### Benefits of Volunteering

- Learn a new area of law
- Receive malpractice insurance during the legal clinic
- Help a veteran and their family
- Free 3 Law & Legal Procedure CLE credits
- Pro bono CLE credits for the clinic
- Be paired with another legal professional
- Enjoy a free lunch

**Time Commitment:** One day: 8:40 a.m. – 3:00 p.m.

**Qualifications:** A legal professional in good standing with your regulatory agency (if applicable)

**Training & Support:** Morning CLE is required

**How to Apply:** Space fills quickly, apply soon! [Link to registration]

**Questions:** Please contact Public Service at [publicservice@wsba.org](mailto:publicservice@wsba.org)

# Task List

Task	Person	Due Date	Done	Notes
Set Date	WSBA/Partner	6 mo prior		
Reserve Location	WSBA/Partner	6 mo prior		
Set General Topic	WSBA/Partner	5 mo prior		
Set Agenda	WSBA	5 mo prior		
Identify CLE Faculty	Education Programs Lead	5 mo prior		
Identify Workshop Faculty	Partner	Partner		
Set Specific Topic	Faculty/WSBA/Partner	4 mo prior		
Post on WSBA.org	Public Service/PB Specialist	2 mo prior		
Volunteer Marketing	WSBA/Partner	2 mo prior		
Create Client Flyer	WSBA	3 mo prior		
Client Marketing	WSBA/Partner	3 mo prior		
Volunteer Registration Open	WSBA IT	2 mo prior		
CLE Materials Due	Faculty	1 mo prior		
Faculty Meetings	Education Programs Lead	Ongoing		
Client Workshop Materials Due	Faculty	Partner		
Form 1 Due	Public Service/PB Specialist	1 mo prior		
Order Flash Drives	Partner	1 mo prior		
CLE Course materials done	Public Service/PB Specialist	1 week prior		
Food Order	Public Service/PB Specialist	Check w/Caterer		
Volunteer Pairings	Public Service/PB Specialist	Monday before		
Volunteer Confirmation Email	Public Service/PB Specialist	Monday before		
Post CLE Materials to web	Public Service/PB Specialist	Tuesday before		
Print CLE Materials	Partner	Thursday before		
Flash Drives loaded with Client materials	Partner	Friday before		
Client Workshop materials done	Partner	Partner		
Debrief	WSBA/Partner	2 weeks post		
Report	Partner	3 weeks post		



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# Task Steps

## Task: Set Date

**Deadline:** 6 months prior

**Who:** WSBA/Partner

**Considerations:** Holiday schedules (probably avoid, November 15-January 15 or 3 day weekends). Military schedules (mandatory monthly trainings etc.)

## Task: Reserve Location

**Deadline:** 6 months prior

**Who:** Partner

**Steps:** Varies with location

**Considerations:** Cost, location in relation to clients, ease of use, proper support staff (specifically A/V staff), technology, separate spaces for each part, accessibility requirements

## Task: Set General Topic

**Deadline:** 5 months prior

**Who:** WSBA staff and Partner

**Considerations:** What topics are important and timely to veterans currently? What topics are “easier” to recruit for? What can be taught in 2-3 hours? Does the CLE topic lend to a successful clinic and vice versa?

## Task: Set Agenda

**Deadline:** 5 months prior

**Who:** WSBA

**Considerations:** How long will the material take to teach? Need a 15 minute break. Need 45-60 minutes for lunch. Need time to connect pairs. Need 5 minutes for introduction and welcome.

## Task: Identify CLE Faculty

**Deadline:** 5 months prior

**Who:** WSBA Education Programs Lead, in collaboration with Partner.

**Steps:** Gather ideas from Partner, LAMP, other appropriate sections, Washington State Veterans Bar Association, check faculty database, other stakeholders. Have faculty register in database.

**Considerations:** Who can speak on the given general topic? What subtopics are they best at? Do they want to speak at the beginners track or the experienced track? Do they want/need a co-presenter? Can they stay for the clinic (ideal, not required)? Can they get sufficient materials in on time? Do they have clinic experience?

### Task: Identify Workshop Faculty

**Deadline:** 5 months prior

**Who:** Partner

**Steps:** Gather ideas from WSBA, LAMP, other appropriate sections, Washington State Veterans Bar Association, check faculty database, other stakeholders.

**Considerations:** What is important for the clients to know to be successful in their case? Can they make information easily digestible for clients? Do they want/need a co-presenter? Can they stay for the clinic (ideal, not required)? Can they get sufficient materials in on time? Do they have clinic experience?

### Task: Set Specific Topic

**Deadline:** 4 months prior

**Who:** Faculty/WSBA Staff/Partner

**Considerations:** What topics are important and timely to veterans currently? What topics are “easier” to recruit for? What can be taught in 2-3 hours? Does the CLE topic lend to a successful clinic and vice versa.

### Task: Volunteer Marketing

**Deadline:** Start 2 months prior

**Who:** WSBA/Partner

**Steps:** Notice on PS list serve, Veterans Bar Association, Partner list serves, LAMP list serve, other Section list serves, past volunteers, e-blast to local WSBA members, post to WSBA.org Call to Duty page, post to WSBA.org events calendar

### Task: Client Marketing

**Deadline:** Start 2 months prior

**Who:** WSBA/Partner

**Steps:** WSBA create flyer with Communications. WSBA send flyer to Partner for dissemination

**Considerations:** Recovery Café, Army OneSource, VA Hospital, Partner contacts, College & University Student Military Office, volunteer list serves

### Task: CLE Materials

**Deadline:** Faculty Submission, 1 month prior, to printer 1 week prior, posted online 2 days prior

**Who:** Faculty/WSBA/Partner

**Steps:** Education Program Lead gather materials from faculty and save in network folder. Public Service/Pro Bono Specialist compile and disseminate to Partner/Printer and post online

**Considerations:** Who will print? What are their deadlines? Possibly, include workshop materials/forms so volunteers can see what clients are getting (feedback from previous Days).

**Task: Volunteer Registration Open**

**Deadline:** Start 3 months prior, open 2 months prior

**Who:** WSBA Staff

**Steps:** Public Service/Pro Bon Specialist send updates to IT for registration questions and data analyzer report

**Considerations:** What information from volunteers are needed? What should the introduction paragraph say? What should the confirmation email say?

**Task: Volunteer Pairings**

**Deadline:** Monday before

**Who:** WSBA Staff

**Considerations:** Ensure each pair has at least 1 active attorney, try to get 1 experienced and 1 non-experienced person in legal area.

**Task: Order Food**

**Deadline:** Depends on vendor's deadlines

**Who:** Public Service/Pro Bono Specialist

**Steps:** Depends on vendor

**Considerations:** How many volunteers, clients, and staff? Order lunch so it can easily be split into two parts - one for clients and one for volunteers.

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# Facility Requirements

## Registration Area

- 3 tables in L-shape for sign-in sheets and badges
- 1 table behind registration tables for book and other supply storage
- 4-5 Chairs
- Outlets for laptops

## 6-7 Separate Rooms

- **2 CLE Classrooms – each room must have:**
  - Tables for approximately 30 attendees – classroom style
  - A projector and screen for PPT presentation
  - Lectern & mic for presenter (depending on size of room)
  - Power outlets for laptops
- **Lunch Room**
  - Room for 60 to eat at tables (legal professionals and partner staff/volunteers)
  - Tables for catered food to be placed on
- **Clinic**
  - Large room for approximately 20-30 consultations (2 volunteers & clients). Volunteers and clients need to be able to face each other at a table and have a confidential conversation.
  - Having dividers between tables preferred.
  - Power outlets for laptops
- **Client Workshop Classroom**
  - Room for approximately 30 – classroom setup
  - Table for lunch food
  - A projector and screen for PPT Presentation
  - Lectern & mic depending on size of room
  - Could be same space as client waiting room, if setup appropriately
- **Client Waiting Room**
  - Could be same as client workshop classroom, if setup appropriately
  - Must have seating
  - Welcoming space for clients to wait for the workshop to begin
  - Space for coffee/tea/soda
- **Child Care Room**
  - Small space for a handful of supervised kids to participate in provided activities.
  - Tables and chairs

**Other Facility Requirements:**

- All client areas should be on same floor, preferably the first floor, whenever possible
- Doors must be open and facility set 30-60 minutes prior to registration starting for staff setup
- Site staff must be available all day for assistance with technology and other issues
- Have at least 30-60 minutes for cleanup after the clinic ends.
- All venues must meet WSBA accessibility standards as provided
- Internet is needed for the clinic at a minimum and should be available for the entire day in all areas.

\*If projectors or laptops are not available, WSBA should be able to provide them

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# Planning Accessible Meetings & Events

## A TOOLKIT

### OVERVIEW

Planning fully accessible meetings and events might at first glance seem overwhelming, but with proper planning can become second nature. An effective approach begins with raising planners' awareness of disability diversity within the legal profession, as well as the barriers that limit or preclude participation by persons with disabilities. During a lifetime, most everyone is likely to experience a disability, whether due to aging, a chronic disease, illness, or an injury. Every reasonable effort must be made to ensure that no person with any type of disability is prevented or discouraged from attending—and from fully and equally participating in—the meeting or event, or any part of it, based on any accessibility issue. Planners should reach out to persons with various types of disabilities, disability organizations, independent living centers, and the ADA National Network Centers for assistance. Note that some individuals may not disclose their disability-related needs, so meeting and event planners should be proactive in addressing potential barriers to participation.

Planners must work with attendees and presenters in an interactive fashion so that the most appropriate accommodations can be identified and provided. It is helpful to have a general understanding of the various types of disabilities, including mobility, sensory, cognitive, learning, and psychiatric. Some accommodations may be unreasonable, i.e., they pose an undue hardship or change the fundamental nature of the service being provided. However, most barriers to participation can be removed without incurring great expense, imposing an administrative burden, compromising the nature of the activity, or raising health and safety concerns.

This toolkit is intended to assist entities in planning meetings and events that are accessible to persons with disabilities. It provides recommendations and checklists for all phases of a meeting or an event, from choosing the venue to promotion, registration, presentations, materials, social events, meals, and staff and volunteer training. Note, however, that it is impossible to anticipate every barrier that might limit or preclude participation by a valued member. Moreover, because new ideas for improving accessibility and new technologies continue to emerge, this toolkit should be viewed as a living document that is meant to evolve.

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## Choosing a Venue

Physical accessibility of a venue is essential to making a meeting or an event accessible for persons with visual, hearing, and mobility impairments. Planners should evaluate the accessibility of the facility itself, as well as the surrounding area. For instance, is the venue located in close proximity to airports, rail stations, taxi or shuttle services, and public transportation routes? Also, are there accessible restaurants, shops, and tourist attractions nearby?

Before booking any meeting or event, plan an on-site visit of the venue to determine whether barriers to accessibility exist for persons with a wide range of disabilities. Do so far enough in advance so as to find an accessible venue without the time pressures created by an impending meeting or event. Of course, an on-site visit should take place in cooperation with representatives from the particular venue. Note that merely asking these representatives whether the venue is accessible is not sufficient. Many times, staff will claim that the venue is accessible when it is not. Also, check whether the venue has participated in an accessibility audit.

Prior to the on-site visit, prepare a checklist of specific accessibility items. For assistance, get in touch with persons with various types of disabilities; even better, bring them along to the visit, as they can be helpful in identifying barriers. In addition, seek guidance from disability organizations and governmental agencies with expertise in barrier-free access, or hire an independent access consultant to assess the site.

We have prepared some sample checklists for the exterior and interior features of the venue, as well as the meeting/event rooms. Note that generally we do not provide exact measurements (e.g., height, width, requisite number, etc.). These can be found in the Department of Justice's regulations implementing Title III of the Americans with Disabilities Act, 28 C.F.R. pt. 36, at [https://www.ada.gov/regs2010/titleIII\\_2010/titleIII\\_2010\\_regulations.htm](https://www.ada.gov/regs2010/titleIII_2010/titleIII_2010_regulations.htm). Note that some items, such as ramps, temporary Braille and tactile signs, detectable warning devices, and additional parking spaces, may need to be temporarily added to make the venue accessible. Therefore, planners should do a walk-through of the venue close to the time of the meeting or event. To obtain additional sample accessibility checklists, as well as local expert assistance with conducting facility audits, you can also contact your region's ADA National Network Center at <http://adata.org/content/email-us>.

Furthermore, prior to confirming the date of the meeting or event, find out whether any disability-related events are taking place during the same time. These events will have an impact on your meeting or event in terms of participants, as well as on the availability of service providers.

## Venue Exterior Features Checklist

- Barrier-free, clearly marked (signage), well-lit accessible main entrance at street level so that all individuals can use this entrance
- Entrance connected by an accessible route to public transportation stops, accessible parking and passenger loading zones, and public streets or sidewalks
- Main entrance/exit doorways that are wide enough (32 inches with the door open 90 degrees) to accommodate wheelchairs/scooters
- Other entrances that are at street level or accessible by ramps or lifts
- Easy-to-open (automatic/push button door openers, lever handles), light (no more than 5 pounds) doors; no revolving doors
- Glass doors with contrasting door frames, stickers, or bright signs
- Clearly marked (Braille and tactile/raised signage), covered drop-off and pick-up points adjacent to the main entrance, with curb cuts
- Accessible transit services (private and public)
- Accessible, clearly marked (symbol of accessibility) parking spaces (1 space for every 25 spaces) located on the shortest accessible route of travel from adjacent parking to an accessible entrance
- Slip-resistant, level surfaces
- Barrier-free/step-free paths of travel
- Close proximity of venue from airport, train station, and public transportation
- Close proximity of venue to restaurants, theatres, shops, and other attractions
- Curb ramps/cuts so that persons who use mobility devices are not traveling in the street
- Crosswalks with visual and audible signals
- Ramps for inaccessible areas, equipped with handrails on both sides if the rise is greater than 6 inches, and level landings
- Stairs with continuous handrails on both sides; no open risers (space between steps)
- Tactile ground surface indicators that signal stairs and ramps for people who are blind or have visual impairments
- Toileting area for service animals



## Venue Interior Features Checklist

- Registration/concierge desks at a height accessible by wheelchair/scooter users that allows for a frontal approach and provides adequate knee clearance under the desk
- Clearly marked (Braille and tactile signage) elevators located on both sides of the door and along an accessible route
- Elevator call buttons with visual and audio signals, reachable by wheelchair/scooter users
- Elevator control buttons that are designated by Braille and raised characters or symbols and are reachable by wheelchair/scooter users
- Elevator interiors adequately illuminated and wide enough for wheelchairs/scooters to enter, maneuver within reach of controls, and exit
- Elevator voice and visual display two-way emergency communication
- Easy-to-open, light (no more than 5 pounds) doors with lever handles that are easy to grasp with one hand or automatic/push button openers
- Wide (32 inches with the door open 90 degrees) doorways for wheelchairs/scooters to enter/exit
- Clearly marked (Braille and tactile signage), accessible exits
- Sufficiently wide (64 inches for two-way traffic), barrier-free hallways and corridors to allow everyone to move about freely
- Even, stable, regular, slip-resistant, non-sloped paths of travel
- Clearly marked (Braille and tactile signage) accessible restrooms located on an accessible route
- Accessible sleeping rooms (check on number available) with roll-in showers
- Accessible fitness center, including restrooms and showers
- Accessible restaurants (including ability to provide for dietary restrictions and large print/ Braille menus), bars/lounges, and shopping
- Emergency procedures for persons with disabilities (audio and visual alarms in halls and sleeping rooms)
- Procedures to respond to medical issues/emergencies
- Accessible space for walking service animals
- Availability of TTY, hearing-aid compatible, and volume-control telephones reachable by wheelchair/scooter users
- Televisions with closed-captioning
- Well-lit areas; adjustable lighting

## Venue Meeting/Event Rooms Checklist

- Signs (with Braille and tactile characters, sans serif or simple serif large type, sentence case, and good contrast) that direct attendees to all rooms
- Barrier-free path to rooms
- Seating aisles that are wide enough (36 inches) to accommodate wheelchairs/scooters
- Well-lit rooms for participants with visual and hearing impairments
- Good acoustics and a functioning auxiliary sound system
- Prominent, well-lit, visible space for interpreters to stand (e.g., raised platform with a dark, solid color background)
- Assistive listening devices, hearing or induction loops, and Communication Access Realtime Translation (CART) for participants who are deaf or hard of hearing
- Location of all audio visual equipment in an area that does not block paths of travel
- Clear line of sight to interpreters and real-time CART
- Roving microphones for audience questions
- Multiple sets of outlets for laptops and other electronic aids
- Well secured, covered cables, wires, cords, and microphones placed outside of paths of travel
- Doors wide enough (32 inches with door open 90 degrees) for wheelchairs/scooters to enter/exit
- Easy-to-open, light doors (no more than 5 pounds) with lever handles or automatic/push button openers
- Speaker podium at ground level or accessible via ramp or lift
- Tables for materials and food/beverage at a height (28 to 34 inches) reachable by wheelchairs/scooters and in an accessible location
- Accessible exhibit areas
- Rooms large enough to allow all persons to move about freely
- Barrier-free aisles wide enough (36 inches) to permit wheelchairs/scooters to navigate
- Accessible bathrooms in close proximity to rooms
- Elevators in close proximity to rooms and along an accessible route
- Quiet break space in close proximity to rooms
- Accessible, integrated seating throughout the room, with preferred seating for persons with visual and hearing impairments in the front rows
- Toileting space and water for service animals
- Proper air circulation with temperature controls

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# Sample Agenda

- 7:45 am** WSBA Staff & Partner main staff arrives
- 8:00 am** Breakfast arrives (WSBA)
- 8:15 am** Check-in, Registration, Coffee and Pastry Service (WSBA)
- 8:40 am** Welcome and Introductions (WSBA & Partner)
- 8:45 am** CLE Session I
- 10:15 am** Break
- 10:30 am** CLE Session II
- 11:15 am** Lunch arrives (WSBA)  
Partner Staff arrives
- 11:30 am** Clients begin to arrive/registration

- 
- 12:00 pm** CLE Adjourn (WSBA helps volunteers find each other)  
Client workshop (Partner)
  - 1:00 pm** Clinic Starts
  - 3:00 pm** Clinic ends/cleanup
  - 3:30 pm** Leave

# Partner Report

	Budget	Actual	Difference
Income			

Personnel Expenses	Budget	Actual	Difference
VLS Staff			
VLS Volunteers			
<b>Total</b>			

Operating Expenses	Budget	Actual	Difference
Advertising			
Printing CLE Materials			
Printing Workshop Materials			
Facility Rental			
Client Lunch			
Other:			
Other:			
Other:			
Other:			
Other:			
<b>Total:</b>			

	Budget	Actual	Difference
<b>Grand Total Income</b>			
<b>Grand Total Expenses</b>			
<b>Difference</b>			

**Objective:** Engage X volunteers in serving X veterans with a single, discreet legal issue

Please share how the objective was met and include any highlights or barriers to meeting this objective:

# Call to Duty Day of Service

## WSBA Call to Duty Overview

The Call to Duty Initiative was created to inform, inspire, and involve Washington lawyers in serving veterans. There are almost 600,000 veterans in our state. Many veterans, are facing distinct barriers to successful reintegration into civilian life.

The Call to Duty Initiative includes the Call to Duty Pledge where legal professionals “pledge” to help veterans with their legal issues and the Day of Service.

## Day of Service Overview

As of March 2017, we have held five Days of Service (DofS): Four days in the Tacoma area and one in Seattle. WSBA partnered with the Tacoma-Pierce County Bar Association Volunteer Legal Program and the King County Bar Association to hold these programs.

Each day has engaged approximately 40-60 legal professionals and assisted 15-30 clients.

### **A Commitment to Inclusion**

The Washington State Bar Association is committed to advancing diversity and inclusion within the legal profession. Toward that end, WSBA is committed to understanding and responding to the professional environment which exists for all lawyers in Washington. Inclusion is best understood as an environment which encourages and incorporates different perspectives, ideas, and experiences. The legal profession is changing. The business interests of attorneys, employers, and clients call for more diverse and equitable legal representation across the state. WSBA recognizes the need to enhance opportunity in the legal profession and the public’s experience with lawyers by demonstrating to its members and the public at large a genuine commitment to supporting and advancing diversity, equity and inclusion.

WSBA is dedicated to living out this commitment to equity and inclusion in all programs, including the Day of Service. Partners need to look for and facilitate opportunities for inclusion of clients and volunteers from various underrepresented backgrounds including:

- a) Cultural/Racial
- b) Generational
- c) Gender
- d) Sexual Orientation
- e) Disability/impairment
- f) Area of Practice

For assistance or for more information, please contact the WSBA Diversity and Public Service Programs Manager, K. Joy Williams at [joyw@wsba.org](mailto:joyw@wsba.org).

# Call to Duty Day of Service

## Agenda

The DofS is based on a service learning model and includes three parts:

1. A morning CLE seminar on an identified high priority civil legal need with two tracks. With the fourth DofS (Tacoma – September 2016), we initiated a few changes:
  - The first three included a cultural competency session that was dropped for the fourth because it was starting to be repetitive for many of the volunteers
  - The first three had one track on the basics of Parenting Plan Residential Schedules and the second on the basics of Child Support Worksheets. On the fourth day, both tracks discussed the same issue at different levels – beginning and experienced. That way someone who had 30 years+ experience in family law did not have to attend a basics course. This was well received.
2. The Partner hosts a workshop for clients outlining their rights, additional resources and expectations for the afternoon.
3. A hands-on clinic in which legal professionals provide assistance *pro bono* to veterans. The clinic focused on the issues discussed in the morning CLE. Again, with the fourth DofS (Tacoma – September 2016), we initiated a change:
  - The first three assumed the legal professional knew very little (if anything) more than what the CLE provided. Two professionals were paired up and could go to “mentor stations” if they got stuck on a particular issue. The fourth day paired a more experienced and a less experienced professional with no mentor stations. This was well received.

**Important Note:** All pairs **must** include at least one lawyer so legal advice can be given. A non-lawyer can only help with the issue but cannot provide actual legal advice.

## Budget

The grant WSBA provides is for \$2,500 (for FY 16 and previous). In Fiscal Year 2017, we increased the grant to \$3,000. The grant covers the following **Partner** expenses:

- Facility Rental
- Volunteer malpractice insurance coverage (if there is an additional cost)
- Staff intake & day of legal clinic costs
- Printing of CLE materials
- Printing of Workshop materials
- Client’s Flash drives

The WSBA budget line item “Day of Service” covers all other expenses, specifically:

- Food
- Faculty Expenses

## Responsibilities

### WSBA:

- Provide staffing for CLE
- Order food

## Call to Duty Day of Service

- Coordinate CLE materials, including collecting, compiling and providing link to volunteers
- Create client recruitment flyer & other promotional materials
- Create volunteer recruitment materials
- Coordinate volunteer recruitment registration
- Partner the volunteers together for the clinic and prepare volunteers
- CLE reporting
- Volunteer evaluations

### Partner:

- Provide staff/volunteers for the registration and the legal clinic
- Provide staff/volunteers for childcare during workshop and legal clinic
- Coordinate workshop materials, including collecting, compiling and printing
- Upload all workshop and clinic materials to client flash drives
- Host the workshop for Clients
- Purchase flash drives
- Provide an “intake summary” that includes the information gathered at intake. This summary will be provided to volunteers at lunch so they may prepare a little before seeing the client.
- Develop client/attorney agreement forms for the clinic
- Conduct day of pre and post client evaluations
- Provide malpractice insurance for the legal clinic
- Provide client screening to ensure that the client’s needs matches the Day of Service topic, is a veteran, and falls within the 0-400% of the Federal Poverty Level.

### Both:

- Conduct site visit prior to securing a space
- Promote to veterans
- Promote to volunteers
- Meet regularly (timing TBD by WSBA & Partner)
- Communicate

### Volunteers (see full description for more details)

- Legal professionals, including attorneys, LLLTs, paralegals etc.
- Can be new or experienced to practice area
- Attend the morning CLE and assist at least one client in the afternoon

### Volunteer Credit

Volunteers receive credit for the full day. Lawyers receive Law & Legal Procedure credits for the morning CLE and Pro Bono credits for the afternoon clinic. As with other CLEs, WSBA applies for and reports credits for the morning CLE. Volunteers report their own pro bono credits per MCLE procedures.