



Washington Young Lawyers Committee

Washington Young Lawyers Committee | Kennewick, WA
Saturday, June 10, 2017 | 9:30 a.m. – 2:00 p.m.
Conference Call Option Available: 1.866.577.9294 | Participant Code: 57240

AGENDA

9:30 a.m.	Introductions & approval of the minutes	Paul Webber, Chair
9:45 a.m.	WSBA Program Proposals and NLP update	Ana Selvidge, WSBA staff
10:00 a.m.	Subcommittee Reports <ul style="list-style-type: none">As requested	Subcommittee chairs
10:30 a.m.	Presentation on leadership in WSBA	Robin Haynes, Board of Governors President
11:30 a.m.	Report back from the February ABA midyear meeting in Miami, Florida.	Amber Rush and Eli Marchbanks
12:00 p.m.	Break for lunch	
12:30 p.m.	Public narrative framework for presentations training and workshop	Erinn Genack, JustLead Washington Leadership Academy Alum
1:30 p.m.	Annual Report & FY 2018 subcommittee proposal	Paul Webber, Chair
2:00 pm.	Adjourn	

FY 2017 WYLC Schedule

October 1, 2016	Meeting: 9:00 a.m. – 2:00 p.m.	WSBA Offices, Seattle
December 3, 2016	Meeting: 9:30 a.m. – 2:00 p.m.	WSBA Offices, Seattle
February 4, 2017	Meeting: 9:30 a.m. – 2:00 p.m.	WSBA Offices, Seattle
April 1, 2017	Meeting: 9:30 a.m. – 2:00 p.m.	Lukins & Annis, PS, Spokane
June 10, 2017	Meeting: 9:30 a.m. – 2:00 p.m.	Ashby Law, PLLC, Kennewick
August 5, 2017	Meeting: 10:00 a.m. – 2:30 p.m.	WSBA Offices, Seattle



Washington Young Lawyers Committee

2016-2017 Committee Roster

<p>Paul Webber, Chair paul@wblawfirm.com Woods & Brangwin PLLC PO Box 4378 Wenatchee, WA 98807 509.663.3915 Term: 10/1/2016 – 10/1/2018</p>	<p>Mike Mocer, Chair-elect mike@mocerilaw.com The Law Office of Mike Mocer PO Box 111804 Tacoma, WA 98411-1804 888-510-1961 Term: 10/1/2016 – 9/30/2019</p>
<p>Helen Ling, Past Chair helen@ling-liang.com Ling & Liang, PLLC 671 S Jackson St, Suite 201 Seattle, WA 98104 206.430.5087 Term: 10/1/2015 – 9/30/2017</p>	<p>Jacob Brennan jbrennan@lukins.com Lukins & Annis, PS 717 W Sprague Ave, Ste 1600 Spokane, WA 99201 (509) 455-9555 Term: 10/1/2016 – 9/30/2019 <i>At-Large</i></p>
<p>Kjersti Stroup kjertistroup@gmail.com Dfi-Securities Division PO Box 9033 Olympia, WA 98507 425.501.3826 Term: 10/1/2014 – 9/30/2017 <i>At-Large</i></p>	<p>Andrew Pugsley DrewP1@atg.wa.gov Washington State Office of the Attorney General PO Box 2317 1250 Pacific Ave Ste 105 Tacoma, WA 98401-2317 (253) 597-4276 Term: 5/17/17 – 9/30/2018 <i>At-Large</i></p>
<p>Jakob McGhie jakob@centralialaw.com Althausen Rayan Abbarno, LLP 114 W Magnolia St. Centralia, WA 98531-4316 360.736.1301 Term: 10/1/2015 – 9/30/2018 <i>Greater Olympia Region</i></p>	<p>Whitny Norton whitny@pyklawyers.com Piskel Yahne Kovarik PLLC 522 W Riverside Ave., Ste. 410 Spokane, WA 99201-0519 509.321.5930 Term: 10/1/2014 – 9/30/2017 <i>Greater Spokane Region</i></p>
<p>Kim Sandher kim@raoandpierce.com Rao & Pierce, PLLC 2411 14th Ave. S Seattle, WA 98144-5014 206.721.8880 Term: 10/1/2015 – 9/30/2018 <i>King County</i></p>	<p>Alice Bagirova alice@northwestlawgroup.com 4584 144th Ave SE Bellevue, WA 98006 (734) 606-9529 Term: 10/1/2016 – 9/30/2019 <i>King County</i></p>
<p>Andrew Van Winkle abvw@uw.edu Chelan County Prosecutor's Office PO Box 2596 Wenatchee, WA 98201 (509) 667-6271</p>	<p>Sarah Fleming sarah@sarahfleminglaw.com Fleming Law Firm, PLLC 720 Main Street, Suite 230 Mount Vernon, WA 98273 360.848.8448</p>

Term: 10/1/2016 – 9/30/2017 <i>North Central Region</i>	Term: 11/17/2014 – 9/30/2017 <i>Northwest Region</i>
Geoff Arnold geoffalanarnold@gmail.com PO Box 668 Cosmopolis, WA 360.591.6249 Term: 10/1/2015 – 9/30/2018 <i>Peninsula Region</i>	Russell Knight rknight@smithalling.com Smith Alling PS 1501 Dock St. Tacoma, WA 98402-3209 253.627.1091 Term: 10/1/2014 – 9/30/2017 <i>Pierce County</i>
Colin McMahon cmcmahon@everettlaw.org Everett Law Group 3232 Oakes Ave Everett, WA 98201 (425) 512-9731 Term: 10/1/2016 – 9/30/2019 <i>Snohomish County</i>	Ryan Griffie ryan@lbplaw.com Larson Berg & Perkins 105 N. 3 rd St. Yakima, WA 98901-2704 509.457.1515 Term: 10/1/2015 – 9/30/2018 <i>South Central Region</i>
Derek Johnson derek@gravislaw.com 710 George Washington Way, Ste A PO Box 840 Richland, WA 99352 (509) 380-9102 Term: 10/1/2016 – 9/30/2019 <i>Southeast Region</i>	Chelsie Elliott celliott@navigatelawgroup.com Navigate Law Group 101 E 8th St, Ste 260 Vancouver, WA 98660 (360)216-1098 ext. 1002 Term: 10/1/2016 – 9/30/2019 <i>Southwest Region</i>

TBD, BOG Liaison	Lynda Foster lyndaf@wsba.org Washington State Bar Association Advancement Department 1325 4 th Ave., Ste. 600 Seattle, WA 98101 206.733.5905
WA Young Lawyers Committee List Serve	wylcommittee@list.wsba.org
WSBA New & Young Lawyers List Serve	newlawyers@list.wsba.org

FY 2017 WYLC Schedule		
October 1, 2016	Meeting: 9:00 a.m. – 2:00 p.m.	WSBA Offices, Seattle
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Washington Young Lawyer Committee

WYLC Subcommittees 2016 - 2017

Liaisons

BOG Meeting Attendance <i>Ensure WYLC member attendance at every BOG meeting</i>		
TBD	Chair	

COMMUNITY

Outreach and Budget <i>Set the agenda for outreach events across the state to educate and inform new and young lawyers. Track funds dedicated to WYLC outreach events and meetings.</i>		
Russell Knight	Chair	rknight@smithalling.com
Paul Webber		paul@wblawfirm.com
Andrew Van Winkle		abvw@uw.edu
Ryan Griffiee		ryan@lbplaw.com
Helen Ling		helen@ling-liang.com
Goals: <ul style="list-style-type: none"> • Hold outreach and educational events across the state. • Educate and inspire new and young lawyers. • Track the budget for meeting expenses, outreach and other events to efficiently use WSBA resources. 		

LEADERSHIP

Leadership <i>Administers the Public Service and Leadership Award and American Bar Association attendance scholarship and awardee recognition. Selects ABA new lawyer delegates. Explores leadership opportunities and support for new/young lawyers in Washington.</i>		
Kjersti Stroup	Chair	kjertistroup@gmail.com
Russell Knight		rknight@smithalling.com
Jacob Brennan		jbrennan@lukins.com
Helen Ling		helen@ling-liang.com
Zachary E. Davison		davison.zach@dorsey.com
Goals: <ul style="list-style-type: none"> • Getting a strong pool of candidates for the Public Service award and ABA scholarships • Awarding the PS Award Quarterly • Helping people attend the ABA Midyear and Annual Conferences 		

EMPLOYMENT

Mentorship <i>Work with the bar to produce "episodic mentorship events" and explore other mentorship opportunities for new/young lawyers.</i>

Whitny Norton	Chair	whitny@pyklawyers.com
Sarah Fleming		sarah@sarahfleminglaw.com
Geoff Arnold		geoffalanarnold@gmail.com
Goals:		
<ul style="list-style-type: none"> • Hold Mentorship Mixers throughout the state • Engage section leadership in hosting Mentorship Mixers • Come up with ideas to help new and young lawyers gain meaningful employment 		

Incubator Program		
<i>Engage in high level discussions on incubator programs and assess the WYLCs place in this endeavor.</i>		
Mike Mocerri	Chair	mike@mocerilaw.com
Derek Johnson		derek@gravislaw.com
Chelsie Elliott		celliot@navigatelawgroup.com
Paul Webber		paul@wblawfirm.com
Alice Bagirova		alice@northwestlawgroup.com
Goals:		
<ul style="list-style-type: none"> • Complete Business Plan Drafted By August, 2017 • Outreach to WSBA, Law Schools, Philanthropists, Big Box Stores, Law Firms, Chambers of Commerce, and Tech Companies for Support and Resources 		

Recruiting, Retention, and Retiring		
<i>Partner with the Oregon YLD in planning and executing the “Northwest Regional Summit: Rural Practice – Recruiting, Retention, and Retiring.”</i>		
Jacob Brennan	Chair	jbrennan@lukins.com
Jakob McGhie		jakob@centralialaw.com
Ryan Griffie		ryan@lbplaw.com
Goals:		
<ul style="list-style-type: none"> • Connect with Oregon New Lawyer Divison (ONLD) Leadership regarding current status of plans • Meet with ONLD counterparts prior to 2016 year end • Apply for ABA YLD funding • Plan a Hood River, OR, Regional Summit 		

DEBT

Debt and New Lawyer Benefits		
<i>Brainstorm and research options and look for opportunities to encourage WSBA to “provide low-cost and free professional resources to new/young lawyer,” including exploring how to give new lawyers access to a brief bank and financial planning services. Inform WSBA’s LOMAP what would be beneficial services for new lawyers.</i>		
Kim Sandher	Chair	kim@raoandpierce.com
Colin McMahon		cmcmahon@everettlaw.org
Chelsie Elliott		celliot@navigatelawgroup.com
Derek Johnson		derek@gravislaw.com
Andrew Van Winkle		abvw@uw.edu
Goals:		
<ul style="list-style-type: none"> • Identify brief banks that currently exist in WA (e.g. sections of the bar, local county bar associations, area of law committees, etc.) • Research student loan debt forgiveness options currently available • Have resource packages sent out as part of quarterly contact emails • Produce a free NLE with a CPA focusing on solo and small firm, as well as student loan tax issues • Research financial planning services already offered by other bar associations or committees 		



Washington Young Lawyers Committee

Washington Young Lawyers Committee | Spokane, WA
Saturday, April 1, 2017 | 9:30 a.m. – 2:00 p.m.
Meeting Minutes - **DRAFT**

Present: Paul Webber, Andrew Van Winkle, Ryan Griffee, Mike Mocerri, Chelsie Elliott, Russell Knight, Jacob Brennan.

Phone: Colin McMahon, Derek Johnson, Sarah Fleming, Helen Ling, Alice Bagirova.

Absent: Kjersti Stroup (excused), Jakob McGhie (excused), Kim Sandher (excused), Whitney Norton (excused), Geoff Arnold (excused).

WSBA Staff: Lynda Foster, Destinee Evers, Ellen Reed (video conference), Ana LaNasa-Selvidge (phone).

Board of Governors (BOG) Liaison: Sean Davis.

Guests: Jeanne Dawes, Molly Moffit.

9:32 a.m. Welcome, Introductions & Approval of the Minutes

Paul Webber called the meeting to order. Jacob Brennan moved to approve the minutes; Russell Knight seconded. The committee voted to approve the moments unanimously.

Limited License Legal Technician Presentation

WSBA staff person Ellen Reed and LLLT board member Jeanne Dawes presented on the history of the LLLT program and its functions. Ellen and Jeanne took and answered questions from the committee.

WSBA new lawyer/law student presentation

WSBA staff Lynda Foster and Destinee Evers updated the committee on their law school presentation pilot project and the presentation they gave to twenty law students at Gonzaga University the day before. The committee was invited to provide feedback on how the presentation could be adapted to a new lawyer audience.

Board of Governor Liaison Report

BOG Liaison Sean Davis reported on the recent BOG meeting and the discussions that occurred, including bylaws, and the license fee referendum.

Subcommittee reports

- **Leadership:** Russell Knight reported on conversations with WSBA staff about the committee's request for increased funding of the ABA scholarship. Funding requests should be discussed in the broader context of the utility of the program and its return on investment. Russell acknowledged that the ABA scholarship has some challenges ensuring the quality and consistency of report backs from scholarship recipients. The committee discussed ways to rework the scholarship to have a broader return on investment for Washington's new lawyer community, such as adding additional requirements to scholarship recipients or changing the scholarship to fund WYLC members to attend and build connections between the ABA and the work of the committee. The WYLC would like the Leadership committee to review this topic and bring suggestions to a future meeting.
- **RRR:** Ryan Griffee reported that the committee is working with the Oregon New Lawyer Division to determine the type of event the summit will be.

- **Incubator:** Mike Mocerri reported on progress of the WYLC incubator program proposal. The committee continues to work with WSBA staff on the process to create a proposal for an incubator program.
- **Mentorship:** Sarah Fleming reported on efforts to organize an event in Bellingham in September. Sarah will attend Washington Women Lawyers event in April to review how the space worked for a WSBA event in that region.
- **Debt and new lawyer benefits:** Chelsie Elliott reported on discussions regarding collaboration with the incubator subcommittee in reviewing debt forgiveness for 501(c)(3)s. She also shared information on the committee's plan to develop an NLE on first five years of practice and personal financial planning. After discussion on these topics it was suggested that the WYLC develop an NLE next year that focuses on student loan refinancing and forgiveness.
- **Outreach and Budget:** Russell Knight reported that the subcommittee discussed the goals of the subcommittee, and its request to update the WYLC budget from \$18,000 and \$19,500. The additional \$1,500 request is to increase the outreach budget to \$2,500. The committee is developing a return on investment matrix for the functions that outreach can accomplish. Ryan Griffie suggests that next year the committee flags the deadline for subcommittees to submit budget increase proposals to the budget committee, so that they have time to get the information to the bar association.

2017 goals review, 2018 goals preview

See workshop discussion.

WYLC workshop on 2018 projects and goals

The committee discussed projects for the next fiscal year and opportunities to collaborate with existing WSBA programming. The committee suggested focusing on:

- Continuing to have two meetings out of Seattle. Meeting location suggestions included: Vancouver, Leavenworth, Chelan, or Wenatchee.
- Future mentorship events.
- Oregon RRR Summit.
- WSBA member benefits collaboration project with LOMAP.
- Outreach presentations done by regional representatives.
- Continuing the ABA scholarship, while reviewing how it's currently structured.

Lynda Foster will take feedback and incorporate into the annual report for committee review in June, to be submitted to the BOG immediately thereafter for review and consideration.

WYLC outreach

- Breakfast: Colin McMahon reported on event and answered committee questions.
- YWCA mock trials: Russell Knight reported on high school competition.

Other Discussions

Andrew Van Winkle raised discussion of the LLLT presentation and how the committee should incorporate this information going forward with outreach and constituent discussions. Also discussion regarding the definition of "new lawyers," whether they include LLLTs, and the role of the WYLC regarding outreach to LLLTs.

1:50 p.m. Adjourn

Motion to adjourn brought, seconded, and passed.

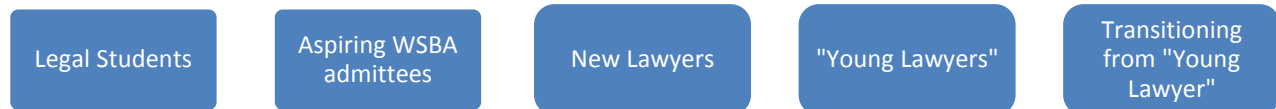
WASHINGTON STATE BAR ASSOCIATION

New Lawyer Programs (NLP) Overview

Purpose: Setting Vision for NLP

New lawyer programs have evolved over the last few years to (a) connect new WSBA members to benefits and programming as they enter the profession; (b) create educational resources for individuals in their first years of practice to gain applied skills; and (c) create volunteer ambassador roles for new legal professionals to elevate the needs of new legal professionals and partner on solutions.

New Lawyer Program Audiences:



1. Legal students. Students at accredited law schools in Washington state, members of the LLLT or LPO program, or the law-clerk program.
2. Aspiring WSBA admittees. New legal professionals who have graduated from their legal education program who are in the process of being admitted as WSBA members.
3. New Lawyers. Attorneys who have been admitted to practice in Washington for fewer than five years. These Attorneys have access to NLE pricing of specific WSBA CLE seminars and products.
4. "Young lawyers." Active lawyer members of the Bar shall be considered "young lawyers" until whichever occurs later:
 - the last day of December of the year in which the member attains the age of 36, or
 - until the last day of December of the fifth year after the year in which such member was first admitted to practice in any state.
5. Transitioning out of "young lawyer" status. WSBA members within months of no longer being classified as "young lawyers." There is no current programming designed for this audience.

Overarching New Lawyer Program functions:

A. Connecting new WSBA members to benefits and programming as they enter the profession

New admittee packet

New Lawyer list serve

Open Sections Night (OSN)

WYLC Quarterly Contacts

NW Lawyer YLC

1. New admittee packet. Led by Communications department, in collaboration with RSD and ADV. The new admittee packet includes information on WSBA resources and is sent out to recently admitted WSBA members.
2. New Lawyer List Serve. This list serve, newlawyers@list.wsba.org, is a discussion platform for new lawyers of the Washington State Bar Association. In addition to being the best place to receive news and information relevant to new lawyers, this list serve is a place to ask questions, seek referrals and make connections with peers. The NLP Specialist manages the list serve.
3. Open Sections Night (OSN). OSN is held twice a year: in the fall outside of Seattle (traditionally Spokane), and in the winter at the WSBA offices in Seattle. All sections are invited to participate in an open-house style event where they can pitch their sections to new legal professionals. OSN is led by the NLP Specialist, in partnership with the sections team.
4. WYLC Quarterly Contacts. An email sent out four times a year from district representatives of the WYLC to all “young lawyers” in their district, with the focus of connecting to new and young attorneys with the WSBA, to be a resource for young lawyers, and to support their transition into the profession. The NLP specialist drafts the content and WYLC district representatives are responsible for sending it out to members in their district.
5. NW Lawyer YLC. Led by the communication department. The NW Lawyer has a “YLC,” or young lawyer community, section. NW Lawyer staff work with new lawyer volunteers to determine articles and publish content.

B. Create educational resources for individuals in their first years of practice to gain applied skills.

Complementary CLEs for students

Preadmission Education Program (PREP)

New Lawyer Education (NLE) Seminars

1. Complimentary CLEs for Students. WSBA Continuing Legal Education has the complimentary student attendee program for part-time and full-time students who are currently enrolled in one of Washington’s three law schools, enrolled in the Limited License Legal Technician Education Program, enrolled in the Law Clerk Program or have Rule 9 Intern status to attend a WSBA CLE and/or WSBA NLE seminar for free. The program is led by NLP in collaboration with the CLE team.

2. Preadmission Education Program (PREP). The PREP is a prerequisite to applying for licensure in Washington State. By Supreme Court rule, aspiring WSBA admittees must complete the free PREP course prior to admission to practice law. PREP is offered as a series of online videos and, in some cases, as a live seminar at various locations throughout the state. The current recording is several years old and an update is being led by the CLE team, with consultation from the NLP team, RSD and ODC.
3. New Lawyer Education (NLE) Seminars. NLE is a WSBA program designed to guide new lawyers in the first five years of their career. NLE seminars and materials focus on the practical application of specific substantive areas, starting from foundational level courses leading up to advanced curriculum.

Development of WSBA NLE is led by the CLE team. The CLE team also conducts standard CLE marketing for these programs. The NLP Specialist partners to do additional alternative marketing and branding within the new lawyer community and assist in new lawyer volunteer recruitment as needed.

C. Create volunteer ambassador roles for new legal professionals to elevate the needs of new legal professionals and partner on solutions.

Law student liaisons
(LSLs)

Washington Young
Lawyer Committee
(WYLC)

WYLC Section
Young Lawyer
Liaisons (YLLs)

NLE development
teams

1. Law student liaisons (LSLs). Each law school has a member of their student government who fulfills the role of Law Student Liaison to WSBA. This program originated from the WYLD several years ago and has historically been underutilized. Last fiscal year WSBA created a law student flyer and NLP connected with LSLs to identify how to work together. For the first time the NLP Specialist connected with new LSLs after they were elected in the spring to host a brief on-boarding meeting and are invited to attend a WYLC meeting. The NLP Specialist sends periodic email announcements of WSBA programming that would benefit law students.
2. Washington Young Lawyer Committee (WYLC). Leadership within the Washington Young Lawyers Committee affords new and young lawyers the opportunity to build connections across the state and throughout the legal community. New and young lawyers partner with the WSBA staff and programs to plan initiatives to support others new to the profession. As a result, the Bar is enhanced by the perspective and energy of its new members.

Outreach tools:

- WYLC Quarterly Contacts
- Engagement of local communities and local YLD
- \$1,000 in outreach budget events promoting WSBA programs and services

- \$2,000 in ABA scholarship budget
- Free NLEs to give to local “Young lawyers” (add line item to reflect this in NLP cost center)
- Public Service & Leadership award (add line item to reflect this in NLP cost center)

WYLC members focus their FY17 work in six subcommittees (down from 11 in FY16):

- Leadership
- Mentorship
- Rural recruiting, retention, and retirement
- Outreach & budget
- Incubator program proposal
- Debt & benefits

3. WYLC Young Lawyer Liaisons to Sections. The Washington Young Lawyers Committee focuses on connecting new and young lawyers to the Washington State Bar Association, its resources, tools, and member benefits. As part of this endeavor, the committee appoints a Young Lawyer Liaison to a majority of WSBA's 28 sections. Cost for being a member of the section is covered in different ways – either the section picks up the cost or the YLL is required to. Programming varies between individual sections.
4. NLE Development Teams. New Lawyer Education's unique seminars are developed by new lawyers for new lawyers. Volunteering for an NLE development team allows new lawyers to develop their professional network, enhance their leadership skills and support their legal community. Recruitment of NLE Development Teams is split between the CLE and NLP teams.

Program Development Recommendations

The New Lawyer Support Specialist role previously included leading several NLP initiatives that have since been moved to other teams, including: new lawyer admittee packet, PREP, partnering in development of NLE seminars, and a larger role in recruitment and management of NLE development teams. This affords the New Lawyer Program Specialist increased capacity to grow NLP programming. Suggestions include:

A. Expand existing programming.

The NLP Specialist is currently investing time administering initiatives that have shown a lack of strategic focus. With strategic investment of resources, the NLP Specialist could optimize and strengthen the following programming.

Incorporate
inclusive naming
models for all NLP

Law Student
Liaisons (LSLs)

WYLC Section
Young Lawyer
Liaisons (YLLs)

1. Incorporate inclusive naming model for all NLP. Language around NLP has not kept up-to-date with changes and trends in the legal profession. The NLP Specialist should review all NLP and propose name changes that are inclusive of the broader WSBA member definitions and audiences. New proposals are to be delivered by summer of 2017, with the recommendation they take effect starting FY 2018.
2. Law Student Liaisons (LSLs). This volunteer program is a carryover from the Young Lawyer Division. Current programming is minimal and administered completely by WSBA staff.

Suggested program expansion:

- On-board 2017-2018 LSLs with the clear goal of connecting law students to specific WSBA resources and events.
- Work with LSLs to strategically identify how they will share information with law students:
 - Identify administrators at law schools that could help disseminate information.
 - Identify list serves or student groups where information could be shared.
 - Ask LSLs for their ideas.
- Partner with LSLs to identify opportunities to present directly to law students on what WSBA benefits are offered to them while in law school (in addition to WSBA Executive Director and Ethics presentations).
 - Pilot local due to limited funding.
- Create strategic communication plan to ensure WSBA programming is shared with law students.

3. WYLC Section Young Lawyer Liaisons (YLLs). This volunteer program was originally designed by the Washington Young Lawyer Division/Committee. While it is considered a program of the WYLC, the administration of the program has shifted entirely onto WSBA NLP staff and the WYLC's function is limited to approving section nominations for YLLs. WYLC and section leadership have always coordinated well in the selection of the liaison.

Suggested program expansion:

- Institutionalize the YLLs program under NLP.
- Fully fund Section memberships of all YLLs from the NLP cost center. This would be an increase in the NLP cost center of roughly \$980.
- In consultation with the sections team, review the current program over spring 2017 and make recommendations for program starting FY 2018. Include opportunity for proposal review with volunteer champions of the program for feedback. Topics to review include:
 - Goal and scope of program.
 - Application and selection process.
 - Leadership and communication training provided to YLLs.
 - Clear expectations of YLL role.

- Any additional funding recommendations to augment the program.

B. Create new programming

Upon reviewing current NLP goals and initiatives and the WSBA strategic priorities the NLP team have identified opportunities to expand program areas to meeting need. NLP staff recommends researching and piloting the following programs.



1. Transferring out of “Young Lawyer” packet. New Admittees receive many communications on resources specifically for new and young lawyers. There are no announcements on what WSBA has to offer to members as they transition out of “young lawyer” status and lose access to certain NLP benefits. This would be a communication tool to highlight benefits still available.

Recommended initiative:

- NLP Specialist leads review of OnBoarding Work Group recommendations and research on materials to include in packet, drafts proposals, and seeks feedback from stakeholders as needed until content is finalized.
- NLP Specialist works with the WSBA Communication department to design the final packet and pilot distribution for the next cycle of WSBA members transitioning out of “young lawyer” status. (Begins FY 2018, December of 2017).
- Continued project would live in communications department, with consultation with NLP staff and other internal stakeholders, (to be identified).

2. Outreach presentations. Current WSBA communications relies heavily on emailing members who are over saturated with email communications, and our messages are struggling to get through. New legal professionals are not aware of all the programming and member benefits available to them. This would reach audiences where they are, face-to-face.

Recommended initiative:

- NLP Specialist creates presentations tailored to specific NLP audiences.
- NLP team partners with Communications Outreach Specialist to identify and connect with target audiences.
- Presentation is piloted locally by NLP Specialist and Communications Outreach Specialist by end of FY 2017.
- FY 2018 goals:
 - Receive and incorporate feedback on strengthening presentation.
 - Identify WSBA staff person to travel and provide presentation in FY18.
 - Train WYLC volunteers to present in partnership and on their own.

3. Recruitment, Retiring and Retention (RRR) regional Summit. The Oregon New Lawyer Division (ONLD) contacted the WYLC to request they partner in a regional summit. Both parties are exploring hosting the regional summit in FY 2018 focused on exploring solutions to recruitment, retiring and retention of attorneys in rural communities. Funding for the summit would be provided by an ABA Subgrant of up to \$3,000, WSBA funds would not be used for the project. Volunteers and staff are in the process of specifying the scope of this project and identifying if there are resources to move it forward.
4. Rural Residency Program Pilot. The WYLC has researched incubator programs and is researching how to create a proposal for an incubator program in Washington State to assist new lawyers in gaining skills and employment when they first enter the profession, potentially run through WSBA. WSBA staff is researching national and local trends of low and moderate income clients to determine where there is unmet legal need, specifically examining reaching unmet need in rural communities. NLP staff would like to research whether a program can be created to address both problems.

Recommended initiative:

- NLP specialist officially takes on responsibility for developing a program proposal, to be researched in FY 2017, drafted and run by stakeholders in FY 2018, and submitted in FY 2018 for potential implementation in FY 2019.
- If approved the program would be piloted before being broadened to a larger community.

5. Bootcamp CLEs

The Section Bootcamps model is currently being explored by the Sections, CLE and Member Service Managers. The Section Bootcamp model would encourage WSBA sections to offer educational programming geared toward the skills development of new practitioners with minimal administrative and marketing support by WSBA staff, similar to the current mini-CLE model. If this program is approved the implementation would occur in FY18.

WSBA COMMITTEE/BOARD ANNUAL REPORT – FY17

Washington Young Lawyers Committee STAFF WILL COMPLETE THIS SECTION Chair: Paul Webber Staff Liaison: Lynda Foster BOG Liaison: Sean Davis	STAFF WILL COMPLETE THIS SECTION Size of Committee: Number of FY18 Applicants: FY17 direct expenses: \$ FY17 indirect expenses: \$
FY17 Demographics: STAFF WILL COMPLETE THIS SECTION <ol style="list-style-type: none">1) Gender (Female: Male):2) Number of members self-identified with a racial/ethnic under-represented group:3) Number of members self-identified as having a disability:4) Number of members self-identified as GLBT:	
Background & Purpose: <p>The Washington Young Lawyers Committee (WYLC) derives its authority from the WSBA Bylaws, WSBA Board of Governors Committees and Boards Policy, and the WYLC Appointment Policy.</p> <p>The WYLC’s purpose is to support new/young lawyers as they transition to practice; connect new/young lawyers with the WSBA programs, services, and activities including pro bono and public service; and to be a resource for new/young lawyers through membership outreach and leadership.</p>	
Strategy to Fulfill Purpose: <p>The WYLC structures its work to address the four key priorities for new/young lawyers that were identified from the November 2014 new lawyer survey and July 25, 2015 Generative Discussion of the BOG with the WYLC: Employment, Debt, Community, and Leadership. The accomplishments and FY 2018 goals outline in this document is how the work of the committee addresses these four priorities and fulfills the purpose of the WYLC.</p>	
2016-2017 Accomplishments and Work in Progress: <p>Employment</p> <ol style="list-style-type: none">1. The WYLC will partner with WSBA MentorLink for the second year to plan and co-host a MentorLink Mixer in Bellingham in September. This structured program introduces experienced and novice attorneys to one another and allows for organic mentor/mentee relationships to form. 2. The WYLC partnered with the Oregon New Lawyer Division (ONLD) to continue plans for a Northwest Regional Summit to take place in 2018. The summit will focus on the future of the law in rural communities and will cover three key topics: (1) the access to justice gap, (2) how young lawyers can use technology to expand their practices across geographic regions, and (3) recruitment, retention and retiring of lawyers. The WYLC	

and ONLD focused this year on planning and preparing an application for an ABA YLD subgrant for this event.

Debt

1. The WYLC volunteered to develop a 'hot topic' NLE to be available for free to lawyers who qualify for the NLE discount in order to **provide low-cost and free professional resources to new/young lawyers**. This year's topic focused on financial planning in the first five years out of law school.
2. The WYLC explored how it could **connect new/young lawyers with other professional communities** such as financial planners and CPAs. The committee connected with the Law Office Management Assistance Program (LOMAP) Specialist to learn about how WSBA solicits and evaluates potential practice management discounts. The WYLC requested financial planning resources be included in the request for proposal process.

Community

1. The WYLC has focused on **across the state outreach**, planning educational networking events in correlation with our two travel meetings in Spokane and Kennewick. District representatives continue to send out quarterly contact announcements to new/young lawyer members in their districts. WYLC members attend WSBA events in their districts, including WSBA Diversity Program's community networking events and WSBA New Lawyer Programs Open Sections Nights in Spokane and Seattle.

Leadership

1. The WYLC distributed the **Public Service and Leadership Award** to five new/young lawyers who make an impact in their community through public service and leadership. A NW Lawyer article was written afterwards to highlight the awardees and the value of their public service and leadership in their communities.
- 1) The WYLC selected and awarded a scholarship to four lawyers to serve as an **American Bar Association Young Lawyer Division Delegate for Washington**. Each scholarship recipient was required to attend a WYLC meeting after their trip to present on what they learned that may be applicable to new/young lawyers in Washington State.

2017-2018 Goals:

Employment

1. The WYLC will host the **Northwest Regional Summit** in partnership with the ONLD in 2018. The committee will focus on developing a summit that leads to proposals and recommendations for the region to address concerns of legal professionals in rural communities.

Debt

1. The WYLC will select volunteers to be part of LOMAP's focus group for the **member benefit review** to provide feedback on potential practice management discounts. The WYLC will continue to advocate for financial planning resources to help manage debt.
2. The WYLC will seek to partner with the WSBA CLE team to develop another **Financial**

Planning CLE to be available free of charge to lawyers eligible for the NLE discount. The seminar will focus on assisting new/young lawyers manage their debt.

Community

1. **Across the state outreach** is vital to connect new/young lawyers with WSBA programs, services, and activities. To accomplish this, the WYLC intends to:
 - a. Develop and deliver **outreach presentations** highlighting the resources WSBA offers new/young lawyers and the work of the WYLC. Each district representative will host or partner with a local organization to do a presentation.
 - b. Create networking events in collaboration with traveling WYLC meetings.
 - c. Attend WSBA events hosted around the state, including Open Sections Night and WSBA Diversity Community Networking Events, and MentorLink Mixers.
 - d. Explore opportunities to build connections with county young lawyer divisions and other new and young lawyer communities, and explore the development of local CLEs to benefit new/young lawyers.

2. The WYLC will review its purpose statement and what it means to be part of the new/young lawyer community in a **Young Lawyer and WYLC bylaw review**. Should the committee see a need for change they will send a proposal to the BOG.

Leadership

1. The WYLC intends to build on the success from past years' **American Bar Association Young Lawyer Division Delegate for Washington** by adapting the ABA scholarship program to create a greater return on investment. The WYLC plans to select a member of the committee to receive the scholarship and attend ABA meetings on their behalf as a delegate. This member will be able to identify ABA opportunities of value to the work of the committee, such as the ABA regional submit subgrant but also represent the WYLC on the national level. The committee member will also be committed to sharing resources with the nearly 7,000 new/young lawyers in Washington. Within 30 days of the ABA meeting the delegate will write a NW Sidebar article highlighting what they learned that is a benefit to new/young lawyers in Washington State. The delegate will also report back to the WYLC at the following WYLC meeting and provide content to be shared in the WYLC Quarterly Contact emails.

2. To connect new/young lawyers to the value of pro bono and public service, each quarter the WYLC will award a **Public Service and Leadership Award** to a new or young lawyer and write a NW sidebar article highlighting the impact of the new lawyer's work on the community. The WYLC will pitch the idea of writing a story in the NW Lawyer at the end of the year highlighting all four awardees.

3. The committee will participate in filling the **BOG Young Lawyer Vacancy** by notifying new/young lawyers of the opportunity to apply for the position and holding interviews of candidates during one of the regularly scheduled WYLC meetings.

Please report how this committee/board is addressing diversity:

1) Are you using any of the tools provided by WSBA and if so, how? 2) Have you sought out training or consultation from the Diversity Specialist? 3) How have you elicited input from a variety of perspectives in your decision-making? 4) What have you done to promote a culture of inclusion within the board or committee? 5) What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive, and eventually lead the profession? 6) Other?

- 1) The WY LC made use of the guidance for nominating teams when nominating new committee members and leaders, identified areas they were not represented and sought out applicants to bring that perspective.
- 2) The WYLC received training from the Diversity Specialist in August 2016 and intends to invite the Diversity Specialist to present again in FY 2018.
- 3) The WYLC has a collaborative leadership style, with key decisions made either by a leadership team that includes multiple perspectives and members of the committee, or by the entire body of the WYLC. The leadership team encourages subcommittees to work collaboratively and bring ideas to the entire committee for discussion. The WYLC also promotes their meetings beyond committee members and encourages other new/young lawyers to attend meetings, and when guests attend they are encouraged to participate in discussion.
- 4) During committee decision WYLC members have called back to their implicit bias training and discussed how bias plays a role in their decision making in order to make more inclusive choices as a committee. Space is made for every committee member to share their thoughts and raise concerns in the discussion.
- 5) The WYLC focuses much of their work on addressing needs of new/young lawyers from different backgrounds across the state. One subcommittee is focused on recruitment and retention in rural communities where many new/young lawyers do not stay to build careers. Individual WYLC members are invited to diversity program community networking events and often attend to meet and support attorneys from under represented communities.
- 6)

Please report how this committee/board is addressing professionalism:

1) Does the committee/board's work promote respect and civility within the legal community? 2) Does it seek to improve relationships between and among lawyers, judges, staff and clients? 3) Does it raise awareness about the causes and/or consequences of unprofessional behavior? 4) Other?

- 1) The WYLC regularly invites speakers to educate WYLC members and guests on pressing WSBA topics so that WYLC members have the information they need to educate their districts and clear up misunderstandings. Speakers included: WSBA president Robin Haynes to share a presentation on professionalism in the legal profession, BOG Liaison Sean Davis to speak about the proposed referendum, and LLLT Board member Jeanne Dawes and WSBA staff Ellen Reed to discuss the LLLT program.
- 2) The WYLC seeks to build and maintain relationships between all new/young lawyers and the legal community. The WYLC hosts outreach events across the state to build relationships with new and young lawyers. Additionally WYLC members attend WSBA events on behalf of their districts and the new/young lawyer community to build relationships with other members of the legal profession.
- 3) The WYLC is on-boarded to understand WSBA communication norms, values, and conflict resolution expectations. Over the course of the year the WYLC has continued to discuss the value of following the communication norms and consequences of failing to do so.
- 4)

Please report how this committee/board is integrating new and young lawyers into its work:

1) How have you brought new and young lawyers into your decision making process? 2) Has the committee/board supported new and young lawyers by (for example) helping to find and prepare them for employment, assisting with debt management, building community, and providing leadership opportunities? 3) Other?

- 1) The committee is entirely made up of new/young lawyers.
- 2) Yes, the committee focuses entirely on those four topic areas.
- 3)



Washington Young Lawyer Committee

WYLC Subcommittees 2017 - 2018 (proposed)

Liaisons

BOG Meeting Attendance <i>Ensure WYLC member attendance at every BOG meeting</i>		
Sean Davis		

ABA Delegate <i>Ensure attendance at ABA Meetings. Duties include:</i>		
<ul style="list-style-type: none"> • <i>NW Sidebar article submitted within 30 days of the ABA meeting</i> • <i>Report back on the ABA meeting at next WYLC meeting</i> • <i>Provide ABA YLD resources and content to be shared in WYLC Quarterly Contacts</i> 		

EMPLOYMENT

Recruiting, Retention, and Retiring (RRR) <i>Partner with the Oregon YLD in planning and executing the "Northwest Regional Summit"</i>		
	Chair	
Timeline and Goal:		

DEBT

Debt and New Lawyer Benefits <ul style="list-style-type: none"> • <i>Be part of LOMAP's practice management discount focus group</i> • <i>Develop financial planning CLE with WSBA CLE team</i> 		
	Chair	
Timeline and Goal:		

COMMUNITY

Outreach Committee <ul style="list-style-type: none"> • <i>Outreach presentations (design & end of year review, any funding for events)</i> • <i>Social events associated with WYLC meetings, including MentorLink mixer</i> 		
	Chair	
Timeline and Goal:		

Bylaw Review Committee	
<i>Review WYLC purpose statement and the WYLC and Young Lawyer definitions.</i>	
	Chair
Timeline and Goal:	

LEADERSHIP

Leadership Subcommittee	
<ul style="list-style-type: none"> • <i>Administer the Public Service & Leadership Award</i> • <i>Write NW Sidebar blog posts (and possibly a NW Lawyer article) about award winners</i> • <i>Lead the BOG Young Lawyer Vacancy outreach and interviews</i> • <i>Work with WSBA staff to research, order, and present awards for outgoing WYLC members</i> 	
	Chair
Timeline and Goal:	

Washington Young Lawyers Committee Nomination Summary Sheet, 2017-2018

BOG action: Appoint

Committee size: 18

- Number of continuing members: 12
- Number of members to be appointed: 4 (and two later)
- Number of applicants: 21

Term length: 3 years; October 1, 2017 - September 30, 2020

Diversity: If the nominated applicants are appointed, the demographics of the 2017-2018 committee in the following areas will be

- Gender (Female: Male: Not Listed): 5:9:0 (2 did not answer)
- Number of members self-identified with a racial/ethnic under-represented group: 2 (3 did not answer)
- Number of members self-identified as having a disability: 0 (2 did not answer)
- Number of members self-identified as LGBT: 1 (2 did not answer)

The Washington Young Lawyers Committee Nomination Team nominates these applicants:

Name			Bar/ID #	District	Position	Reappointment?
Emily	Ann	Albrecht	47299	9	Member	N
Jordan	Lee	Couch	49684	7S	Member	N
Molly	Marie	Moffett	50416	5	Member	N
Andrew	Daniel	Pugsley*	48566	10	Member	N
Nathan	John	Beard	45632	7N	Alternate	N
Zachary		Davison	47873	7N	Alternate	N
Maxwell	Everett	Kirchhoff	51815	0	Alternate	N
Tyler	L.	Merrill	50696	0	Alternate	N

*Term starts immediately and ends 9/30/18

Notes: District 0 = home address is out of state, not available or not relevant



Washington Young Lawyers Committee

WYLC Representative Report

DUE: 2 weeks prior to committee meeting

Please submit report electronically to the WYLC Chair and Staff Liaison Lynda Foster (lyndaf@wsba.org).

WYLC Focus Areas:

- support new/young lawyers as they transition to practice;
- connect new/young lawyers with the WSBA programs, services, and activities including pro bono and public service; and
- serve as a resource for new/young lawyers through membership outreach and leadership.

Member: Chelsie Elliott

Region Represented: Southwest

1. Top three recent ways you helped accomplish WYLC's focus areas:

1. Discussion and outreach with new attorneys in the area at Young Lawyer Section events.
2. Discussions with CCBA Young Lawyers Section President re outreach to young attorneys.

2. Relevant upcoming events and any opportunities for WSBA, WYLC, and/or community partner collaboration:

1. June 14, 2017 - CCBA Nuts and Bolts - Modification in Family Law Tips and Tricks – 3:00 pm to 5:00 pm – Location: Warehouse 23 (100 Columbia St #102, Vancouver, WA 98660)
2. June 14, 2017 – Beer and Justice – 5:00 pm to 7:00 pm – Location: Loowit Brewing Company (507 Columbia St, Vancouver, WA 98660)

3. Any additional items to report or future agenda items:

N/A.

Member: Geoff Arnold

Region Represented: Peninsula

1. Top three recent ways you helped accomplish WYLC's focus areas:

- 1.volunteered at a free legal clinic in Aberdeen once every month.
2. Helping Hoquiam high school students tour the court house and take in various dockets at the court house. Also helping a potential Aberdeen High School Student who is thinking about attending law school.
3. Preparing for local bar elections in Grays Harbor County.

2. Relevant upcoming events and any opportunities for WSBA, WYLC, and/or community partner collaboration:

1. Local BAR Elections are Monday June 5, 2017
2. Potentially still work on a clinic for individuals in need of assistance with elder law issues: I.e. Probate and estates problems.
3. Young professionals of Grays Harbor are attempting to create a structure and become more involved in the community. There will be a meeting this month regarding this matter.

3. Any additional items to report or future agenda items:

Looking forward to the meeting on the 10th and the social event afterwards. What

Member: Whitney Norton

Region Represented: Greater Spokane

1. Top three recent ways you helped accomplish WYLC's focus areas:

- 1.Attended SYLD meetings and engaged with local new and young lawyers.
- 2.Mentor local law students.

2. Relevant upcoming events and any opportunities for WSBA, WYLC, and/or community partner collaboration:

- 1.The SYLD has been hosting monthly mentorship mixers at local wineries. These events have been a success and we welcome all attorneys in the area to attend future events.

Any additional items to report or future agenda items:



Washington Young Lawyers Committee

WYLC Subcommittee Report

DUE: 2 weeks prior to committee meeting

Please submit report electronically to the WYLC Chair Paul Webber (paul@wblawfirm.com) and Staff Liaison Lynda Foster (lyndaf@wsba.org).

WYLC Focus Areas:

- support new/young lawyers as they transition to practice;
- connect new/young lawyers with the WSBA programs, services, and activities including pro bono and public service; and
- serve as a resource for new/young lawyers through membership outreach and leadership.

Sub-Committee Topic: Mentorship

Sub-committee Chair: Whitney L. Norton

Members: Sarah Fleming & Geoff Arnold

1. Top three recent ways you helped accomplish the sub-committee's goal:

1. As MentorLink and the WSBA's mentorship campaigns have flourished we've found it difficult to provide meaningful activities and support for new and young lawyers transitioning into practice. We are a willing resource able to help the WSBA's mentorship efforts.

2. Any action item or feedback you are requesting from the full Committee:

3. Any additional items to report or future agenda items:

We appreciate the WYLC's input on our direction and future efforts.

Sub-Committee Topic: Debt/new lawyer benefits

Sub-committee Chair: Kim Sandher

Members: On Call: Lynda Foster, Colin McMahon, Chelsie Elliott, Megan Scott (Education Lead), Kim Sandher

Brief Bank - on hold for now

Debt Forgiveness Program: Chelsie said her firm is still working on how they could provide low cost services to people and 501C-3 issues; no update right now but she may for the next meeting. By Thursday she will know more.

NLE: August is the earliest that we could do; we can't get our choice of dates if we go with September (will be much harder to get a date since it's a free CLE); Megan will send out a Doodle Poll tomorrow for us to pick dates with a 48 hour return. Will look at 3 hour spaces so we have enough time.

- any thoughts on length? up to 3 hours
- topics: Financial Planning the First 5 years out of Law School.
- speaker: try to get someone that is a CPA and a lawyer (Megan has one person in mind); we want to take into account the that people such as financial planners may have other motives such as selling their services. We want to focus on getting someone that is there to educate
- Colin is going to be our point of contact with making decisions, he will work with Megan with regards to recruiting faculty, etc.

Sub-Committee Topic: Recruiting, Retention, Retiring

Sub-committee Chair: Jacob Brennan

Members: Jakob McGhie, Ryan Griffiee

4. Top three recent ways you helped accomplish the sub-committee's goal:

1. Held WA / OR conference call for planning and decided on next steps.
 - Decided on a "Summit" type conference – will get getting stakeholders together to discuss RRR topic with goal towards brainstorming ideas / projects to implement, idea being he hold a follow up conference a year later to check in
 - Waiting to hear back from ONLD staff with venue information – looking at Beaverton / PDX / Skamania
 - Will be organizing regular 'check in' calls to update entire group on progress
2. Drafted a project plan (attached) and will be working on delegations / splitting up responsibilities
3. LYNDA!!!!!!

Any action item or feedback you are requesting from the full Committee:

5. None at this time.

6. Any additional items to report or future agenda items:

None

2018 ONLD WYLC RRR Conference Time Task Schedule

<i>Steps will be highlighted if A and R are not assigned.</i>		Regional Summit team			
R:	Does the step	ONLD			
A:	Accountable for the step	Jennifer	Nicholls	ONLD Chair	JNicholls@broj (541) 772-7123
C:	Consulted with before the step	Colin	Andries	Immediate Pas	colin@slindene (503) 417-7777
I:	Informed when the step is completed	Michelle	Lane	ONLD Staff	mlane@osbar.org
S:	Support role	Catherine	Petrecca	ONLD Staff	cpetrecca@osl (503) 431-6355

Project:	RRR Summit	WYLC			
Start	2016	Jacob	Brennan	WYLC Board	jbrennan@lukii (509) 455-9555
Due	Tentatively June 2018	Ryan	Griffiee	WYLC Board	ryan@lbplaw.c (509) 457-1515 x 104
Budget/CC	TBD	Jakob	McGhie	WYLC Board	Jakob@central (360) 736-1301
Who	See charts to the right	Lynda	Foster	WYLC Staff	Lyndaf@wsba. (206) 733-5934
Stakeholders	ONLD, WYLC, ABA YLD, law schools, OBA, WSBA, Sections, local bar associations, rural law firms				
Dependencies	ABA YLD subgrant, staff time				
Risks	Funding,				

Phase	DESCRIPTION	ONLD	ONLD Staff	WYLC members	WYLC Staff
1	Scope & Budget				
2	Location/Facilities	C	R/A	C	C
3	Program Development				
4	Promotion & Registration				
5	Design and print conference program				
6	Pre conference logistics				
7	Conference logistics				
8	Post conference report				
9	Post conference logistics				

Task/topic area	Primary Responsible Party	Deadline / Date Range	Done?	Notes
Phase 1: Scope & Budget				
Kickoff meeting between ONLD/WYLC leaders and staff	Lynda will schedule	Before end of April	x	Review: topic, goal, scope, budget
Schedule regular check ins	Lynda will schedule			
Identify what materials are needed to apply to ABA subgrant	Jacob			Be sure to add deadlines into this timeline
Determine general timeline for the summit & agenda topics				
Solidify proposed budget	Cathy/Michelle			Built off of venue research
Determine sponsorship benefits and identify potential sponsors				
Assemble ABA subgrant materials for review by summit team				
Finalize materials and apply for subgrant				need to go through before being submitted in
Receive news from ABA re: subgrant				
Set date, build timeline backwards from that in below task outlines				Will depend on venue
Seek sponsorships				
Phase 2: Location/Facilities				
Clarify what is needed from venue	ONLD/WYLC			Rental/AV and Cost/Room Rate/Guest Room
Research potential venues	Michelle			Hood river/rural WA or OR/ a bar office
Solicit bids to host conference	Michelle			
Select Conference Location				budget/whether we get subgrant funds?
Sign Contract/Provide Downpayment				
Final payment				

Phase 3: Program Development				
Create Program Development Committees ("PDC") for each topic area / session / break out				Goals are recruiting speakers, developing materials and outline of individual presentation / break outs
Research what is needed when you apply for CLE credit				both WA and OR; use this info for "role and responsibility" doc if you're recruiting CLE speakers
PDCs schedule regular check in meetings				
PDC iron out each session's topic and intended outputs				
Create a "role and responsibility" document for each facilitator/speaker				Lynda can help - our CLE team has something like this for speakers so they know what
PDC recruits speakers and moderators				Keep spreadsheet updated
Deadline for bios to include in marketing				
Identify tours, events, etc. offered in addition to conference sessions				Optional - Ryan G.??
Finalize Program Schedule				
Apply for CLE credit in both WA and OR where applicable				
Phase 4: Promotion & registration				
Identify target audience (institutions & individuals)				Who is it that needs to be at the summit in order for the summit to meet its goals?
write promotional copy describing the event to use throughout materials				
Conference Logo/ graphic				WSBA comms may be able to help if needed on finances - On-line registration, about,
Create registration page				
Invitations sent out to target audience				
Regular updates sent out to target list				date :)
Identify SWAG (Give Aways, e.g.-- pens, bags, etc.)				Optional - should this be in budget section or pre-meeting logistics section?

Phase 5: Design and Print Conference Program				
Identify how large this can be/what staff time will be needed to create it in order to budget appropriately				
Welcome Letter				
Acknowledgments				
Event Center Space and other info to support tours, off-site events, etc.				
Session write-ups, speakers, etc.				
Room #s to go with sessions				
Faculty Bios				they'll attend
Conference Participant Info				
Sponsor, etc. info				
Deadline for first draft materials				
Deadline to review draft				
Be available to review drafts until things look good to go				
Final draft - printing and assembly				
Phase 6: Pre Conference Logistics	Primary Responsible Party	Deadline / Date Range		Notes
Finalize exhibit/display space from other bar groups / bar sections				Possibly for sponsors?
Create and distribute e-mail speaker confirmation and packet				
Create CLE Form and Process requests				development
Assure necessary AV in place				
Make final food choice selections				
Track registration, overnight room rentals, income, etc.				Tailor this to our needs based on budget and venue agreement

e-mail registration notification				
Banquet event orders including food, room set up and AV needs to hotel				
Phase 7: Conference Logistics				
Event Staffing				Assess needs and assign roles
Prep and assure availability of AV, programs, flash drives, etc				
Registration Table (check in lists with presenter notations)				
Assemble Conference Materials				May include visitor bureau map and info
Session Signage				
Table Tents and Signage for Reception, Exhibit area or other events				
Create/provide name tags				
Tool kit/power cords/easels/chart paper				
Support for tours and other events				
Phase 8: Post Conference Report				
This needs to be built out based on discussions with development team				
Phase 9: Post Conference Logistics				
E-mail On-line Evaluation				
Compile and create evaluation report				
Conference Participant Thank You				
Sponsor and presenter Thank You				
Complete CLE paperwork				
Account Reconciliation				other revenue and expenses
Final Accounting to ONLD/WYLC				
Full ONLD/WYLC Team debrief / lessons learned				

2018 ONLD WYLC RRR Conference Budget tracker	
Projected revenue	
line item	revenue
Conference Attendance (\$30, goal of 40)	900
ONLD sponsorship	1500
WYLC sponsorship	500
Other sponsors	500
ABA YLD Grant (ask for maximum of \$3,000)	2000
Total	5400
Projected costs	
line item	Expense
Summit/Presentation Room Rental	2000
Food order during summit (coffee, any snacks, lunch)	2000
WSBA CLE Sponsorship fee (\$50 to register, \$1 per attendee)	80
OSB CLE sponsorship fee	40
Speaker costs (ABA Pres./Keynote - \$500 airfare, \$200 room, \$50 per diem)	750
AV Equipment (microphone, projectors, screens)	500
credit card fees for registration (if applicable)	
Day of materials (signs, name tags, supplies for sign in table, handouts)	500
Total	5370