



SEMINAR FACULTY GUIDE

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The WSBA-CLE mission is to provide the highest quality continuing legal education programs and products that promote learning, enhance skills, and inspire high standards of practice.

Faculty Timeline and Checklist

1A

3-6 months before the seminar		Faculty Handbook
<ul style="list-style-type: none"> ✓ Accept the invitation to be a member of the faculty ✓ Talk through your topic and approaches with the Program Chair <ul style="list-style-type: none"> • Who is the target audience? Beginning, immediate, or advanced practitioners? • What are the other topics being covered at the seminar? ✓ Submit your session title and description (what participants will learn from your session) to the Program Chair ✓ Research and prepare your session content 	Chapter 2	
3-4 months before the seminar		
<ul style="list-style-type: none"> ✓ Attend the first faculty meeting to talk through your content and approach with other faculty, Program Chairs, and the CLE Seminar Team. ✓ If presenting with others, arrange a meeting with your fellow presenters and Program Chair to plan your session. 	Chapter 2	
4-6 weeks before the seminar		
<ul style="list-style-type: none"> ✓ Attend the second faculty meeting to review the seminar day and discuss webcasting best practices. ✓ Work on written materials to accompany your presentation. 	Chapter 4 Chapter 3	
1 month before the seminar		
<ul style="list-style-type: none"> ✓ Turn in your written materials and biographical sketch to your Seminar Developer ✓ Prepare your PowerPoint® and other seminar media. 	Chapter 3 Chapter 5	
Seminar day		
<ul style="list-style-type: none"> ✓ Arrive at least 30 minutes prior to your session ✓ Come for the seminar, or as long as you can. Enjoy networking. 		
Up to 4 weeks after the seminar		
<ul style="list-style-type: none"> ✓ Submit reimbursement form. ✓ Report your preparation credits. 	Chapter 6	

2A

Planning Your Session

What lawyers want

Information they can use

Most lawyers attend CLE programs looking for practical learning – **practice pointers, skills and knowledge** – to apply right away so they can do a better job for their clients. Isn't that why you go?

However, too many CLE presenters slip into the habit of standing at the podium and giving case and statute summaries or the like and not giving attendees what they came to get – **concrete ways to apply the information to their practice.**

To plan an engaging presentation, put yourself in the attendees' place:

- Structure your presentation around three or four things participants will be able to do better after your presentation.
- Insert practice tips throughout your presentation and/or give examples of how they may apply the information you just provided.

Tips for planning your session

Making your content relevant

When planning your presentation, start with what you want the participants to learn from your session, and the content will follow. This is like the technique you use to approach a case – **start with a closing argument and work backwards to construct a trial strategy – or define the outcomes you want for the client - and then plan the strategy that will get you there.**

Techniques for generating ideas and planning outcomes – topic outline

- Complete this sentence for your attendees. "When you finish this session, you will be able to (or better be able to)..."
- Make a list of possible topics, followed by the sentence, "And you'll want to know this because it will help you..."
- Think about what you wish you knew earlier about this topic, along with the reasons why it was important. Build your best practices and case examples from there.

Your program description for the brochure

When you've created your topic outline, describe what they will learn

Provide your chair with phrases like these for the brochure and to guide your planning:

- How to assess your client's...
- Best practices to ...
- How changes in the law impact...
- How to handle ...
- What are the protocols for ...
- Spot the red flags ...
- What recourse does your client have ...
- Identifying current trends and their impact on ...

Coursebook Materials

Plan your coursebook materials.

Plan from the beginning for your coursebook materials. Note cases, references, etc.

Planning Your Session

Speaking Tips

2B

Involving the participants – even a little bit – increases learning and significantly increases participant satisfaction. Involvement activities can take just a minute or two to implement - so you still have plenty of time for your content delivery.

Here are 5 ways you can make your presentation more effective by involving the participants.

1. Show of hands

Use a show of hands to get to know the participants.

Develop rapport with the participants by asking for their input. Examples:

- How many have run into this situation before?
- Who worries about this happening to them or their client?
- How many of you think this is a rare occurrence?

Advance notice: You will need to submit your questions to the program coordinator at least 3 days in advance. The webcast team will format your questions as a poll for the webcast participants.

2. Relate to audience experience

Ask the participants how your topic relates to their practice.

At the beginning of your session, ask participants to jot down three or more ways this new law may affect them and their clients. At the end of your session, ask participants to review what they wrote. What more can they now add?

3. Ask rhetorical questions

Get the participants thinking along with you with a question to frame the content.

- What motion would you make?
- Who is the client in this case? The insurance company or the claimant?
- Does this rule apply to the situation?

TIP: Pause to give participants time to think before providing the answer.

4. Use cases – real or hypothetical

Use a case – and the questions it raises - as your opening and closing.

Open your presentation with a case and the issues the case raises. Launch into the information that participants need to know about the law, and then at the end, review the case and the questions again, followed by your interpretation or a group discussion with participants.

TIP: Remember to include the case summaries, and the questions, in your written materials.

Advance notice: If using hypotheticals, please submit them to the program coordinator 3 days in advance.

5. Red Flags

Highlight main points with “red flags.”

Use red flags to alert participants to potential/common errors.

- As we go through the changes in the law, see if you can spot the four red flags that will affect how your clients do business.

Session Planning Worksheet

Your participants want to learn how to improve their practice. Even general and overview information can be structured in ways that will make it applicable and relevant to participants.

Effective Organizing Structures

Here are a few examples of how effective seminar presenters organize their sessions for the greatest impact:

1. **Overview and implications.** "I'll describe the change in the law, and then give some possible implications of the change for attorneys and our clients."
2. **Scenario and solution.** "Imagine your client calls with this situation..."
3. **Enumerate your main points.** "Here are the three most common pitfalls and how to avoid them..."
4. **Rules and applications.** "I'll go through the RPC section by section, and give practice tips and cautions after each section."

Use the worksheet below to outline what you want the participants to learn from you - and how you're going to help them apply that knowledge.

Content Outline	Topics and Subtopics	Apply to practice. . .	Notes
EXAMPLE: <i>Changes in the commercial foreclosure law</i>	<i>Deeds in lieu of foreclosure</i> - <i>Overview and definitions</i> - <i>Subtleties</i>	<i>Implication for commercial clients – red flags to watch for</i>	<i>Highlight rule 2(3.a) in coursebook materials</i>

Coursebook Materials

Manuscript Guidelines

3A

There is a good reason that MCLE (the department within WSBA that grants CLE credit for quality education programs) requires “high quality” written materials to accompany accredited seminars [APR 11 Appendix Reg. 102(a)(4)]. Quality written materials provide the background, depth, and support for attorneys to apply what they’ve learned to competently and ethically practice law. Coursebooks are also sold as stand-alone reference materials after the seminar. Coursebook materials that consist solely of copies of PowerPoint® slides may not satisfy the requirement of “high quality” written materials.

Deadlines:

- Your biography and coursebook materials are due **four weeks before the seminar.**
- PowerPoint® presentations and other media are due **one week before the seminar.**

We are not able to proofread your materials and ask that you or your staff do so before submitting them to us.

How to submit materials

Please submit materials, including attachments and biography, in Word (not PDF) and by e-mail to your Seminar Developer.

Format Basics:

- Submit all materials as a Microsoft Word® document (not a PDF)
- Limit materials to 25-30 single-spaced or double-spaced pages, including appendices.
- Use Times New Roman 12-point font and 1-inch margins.
- If you want to include your PowerPoint® in the coursebook, submit it in the original .ppt file.
- If you choose to provide a table of contents, use page 2 of your document and begin the body of your chapter on page 3.

What to include that participants find most useful:

- Forms
- Checklists and guiding questions
- Practice tips
- Examples and samples
- Summaries of cases
- References and links to other useful resources
- When referring to cases or statutes, provide a brief summary and comments on why they are significant, and the URL pointing to the case, statute, and/or other resources.

A note on copyrights:

We are usually *not* able to reprint articles from news agencies. However, if you plan to include copyrighted material, please indicate the source of the materials and obtain reprint permission before submitting it. Be aware that many publishers require up to six weeks to grant permission.

You will receive a required copyright release letter to sign and return to WSBA.

Sample Title Page and Biography

CHAPTER ONE

YOUR CHAPTER TITLE GOES HERE

November 2012

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JANE Q. FACULTY-MEMBER is an Assistant Professor at the XYZ School of Law, where she teaches in the areas of xxxxxxx and xxxxxxx. She is also the Director of the Law School's xxxxxxx program. Prior to joining the faculty, she was an attorney with xxxxxxx in Seattle, Washington, where her practice focused on Criminal Law. She also served as a Trial Attorney with the xxxxxxx, and was an Attorney-Advisor to xxxxxxx. She was admitted to the Washington State Bar in 1985.

Coursebook Materials

Citations and Style

3C

Cases	Italicize names of cases: <i>Smith v. Jones</i> (See A UNIFORM SYSTEM OF CITATION [the Harvard “Bluebook”] Rule 10.2.2 and Table T.6 for abbreviations of case names in citations.)
Washington Cases	Supreme Court: 102 Wn.2d 345, 467 P.2d 897 (1987). 43 Wash. 586, 98 P. 120 (1933). Court of Appeals: 56 Wn. App. 256, 479 P.2d 799 (1980). <ul style="list-style-type: none">• Watch for Wn. instead of Wash. when the citation is to the first series of Washington Reports. It is only Wn. when it is Wn.2d; if you see Wn. by itself, it is incorrect (should be Wash.) This is a variation on Bluebook style per the Washington Courts Office of Reporter of Decisions Style Sheet.• Also, keep an eye out for the space that is supposed to appear between Wn. App.• Use Roman numerals to distinguish Court of Appeals divisions, e.g., “Division I,” “Division II,” etc.
Statutes and Regulations	Local LR for Local Rules that correspond to CR by county: King County LR 16. Preference is King County LR 16.1 over KCLR 16.1. Washington RCW 42.17.020. Ch. 46.64 RCW. Laws of 1986, ch. 23, §12 (for uncodified legislation) WAC 163-42-125. Ch. 308-65 WAC. Federal 15 U.S.C. §1635. I.R.C. §104. 16 C.F.R. §902. 12 C.F.R. Part 214. 49 Fed. Reg. 34,567. Treas. Reg. §1234.
Style Considerations	Spell out entire word “Chapter” at the beginning of or within a textual sentence. Example: “Chapter 52.04 RCW was enacted in 1999.” Gender-Neutral Language: Whenever possible eliminate the use of “he or she,” “his or her,” and the like. Avoid substituting “their.” Instead, reword the sentence whenever possible to avoid the need for such pronouns.

I. INTRODUCTION

Section II of this outline addresses several significant Washington state and local tax issues that business lawyers are likely to face in their practices. Although most of these issues are not new, they are nonetheless frequently overlooked. Some of these issues present opportunities for creative tax planning; others are traps for the unwary. Most are both.

Sections III through VI of the outline summarize some of the most significant state and local tax developments in Washington State since January 1, 2001....

*** {denotes material omitted for space reasons}

II. WASHINGTON STATE AND LOCAL TAX ISSUES FOR THE BUSINESS LAWYER

A. ASSET SALES VERSUS STOCK SALES

There are significant differences between the state tax treatment of an assets sale and the sale of an ownership interest in an entity. The sale of tangible personal property is subject to sales or use tax to the extent a specific exemption does not apply....

As an alternative to an asset sale, Washington taxpayer entity as the vehicle to transfer the assets without sales three steps....

B. STATE TAX ISSUES RELATING TO THE NATU

The applicability of the sales and use tax and the real e exemptions, and the business and occupation tax classi turns on the nature of property sold....

1. Real Property v. Personal Property

Washington courts and the Department of Revenue app determining whether personal property has become a fi purposes. All three tests must be satisfied: (1) Actual appurtenant thereto; (2) application to the use or purpos which it is connected is appropriated; and (3) the intent to make a permanent accession to the freehold. *Depart Wn.2d 663, 667, 538 P.2d 505 (1975).*

2. Intangible Property

1-3

Substitute House Bill 1051, Chapter 327, Laws of 2011, hereinafter referred to as the “2011 Trust Act” or the “Act,” makes the following major changes in Washington law effective January 1, 2012. Various technical, minor changes have been omitted from this outline.

1. Definition of Trustor and Settlor. The Act defines the terms “Trustor” and “Settlor” under RCW 11.02.005 as a person, including a testator, who creates, or contributes property to, a trust.¹

2. Notice to Trustee of Pendency of Probate. Regarding the required notice of pendency of probate under RCW 11.28.237, the Act provides if a trust is a legatee or devisee of the estate or a beneficiary or transferee of a nonprobate asset of the decedent, “then notice to the trustee is sufficient”.²

Practice Tip: Add this 20 day “notice to trustee” to your estate checklist.

3. Powers of Attorney. Regarding the unusual powers allowed under RCW 11.94.050 when expressly stated in a power of attorney (“POA”): the Act provides the principal may expressly grant the power to exercise the principal’s rights to distribute property in trust or cause a trustee to distribute property in trust “to the extent consistent with the terms of the trust agreement”.³

Practice Tip: Include this additional power in your client’s POA, where appropriate, and include corresponding language in your client’s trust authorizing these actions under a POA. See also, item 42 of this outline.

4. Reformation of Will or Trust under TEDRA. The Act makes numerous amendments to the Trust and Estate Dispute Resolution Act (“TEDRA”), Chapter 11.96. RCW. For example, the Act amends the definition of the term “matter” under RCW 11.96A.030 to include the reformation of a will or trust “to correct a mistake” under the new RCW section described in item 16 of this outline.⁴

5. Venue Related to Trusts under TEDRA. For testamentary trusts, the Act amends RCW 11.96A.050 to provide venue for proceedings related thereto is in the Superior Court of a county where the probate of the will occurred or, in the alternative, the Superior Court of a county where any beneficiary of the trust entitled to notice resides,

The Online Participants

The Webcast

4A

Approximately 50 percent of your participants will be attending online via the webcast! They are just as lively and engaged as the on-site participants and are important members of the audience.

Best practices – Presenting to the Webcast Participants

To be sure you're effectively engaging the webcast participants, follow these best practices:

- Always speak clearly into the microphone.
- Specifically address the webcast participants in your opening remarks and within the session.
- Always speak from the stage. The cameras are fixed on the stage only, and cannot follow you off-stage.
- Wear colors that stand out from the medium grey backdrop. Avoid wearing patterns.

Using Media

Video: When using video in your presentation, you must get written permission from the copyright owner and submit it to the Seminar Developer. This includes YouTube® and other “public” videos.

- All video must be provided to Webcast Team 7 days prior to the date of the program.
- Please provide an electronic copy/file in the highest resolution possible. The preferred aspect ratio is 720 x 480. Format preferences are .mov, .avi, .mp4, .wmv and .flv.

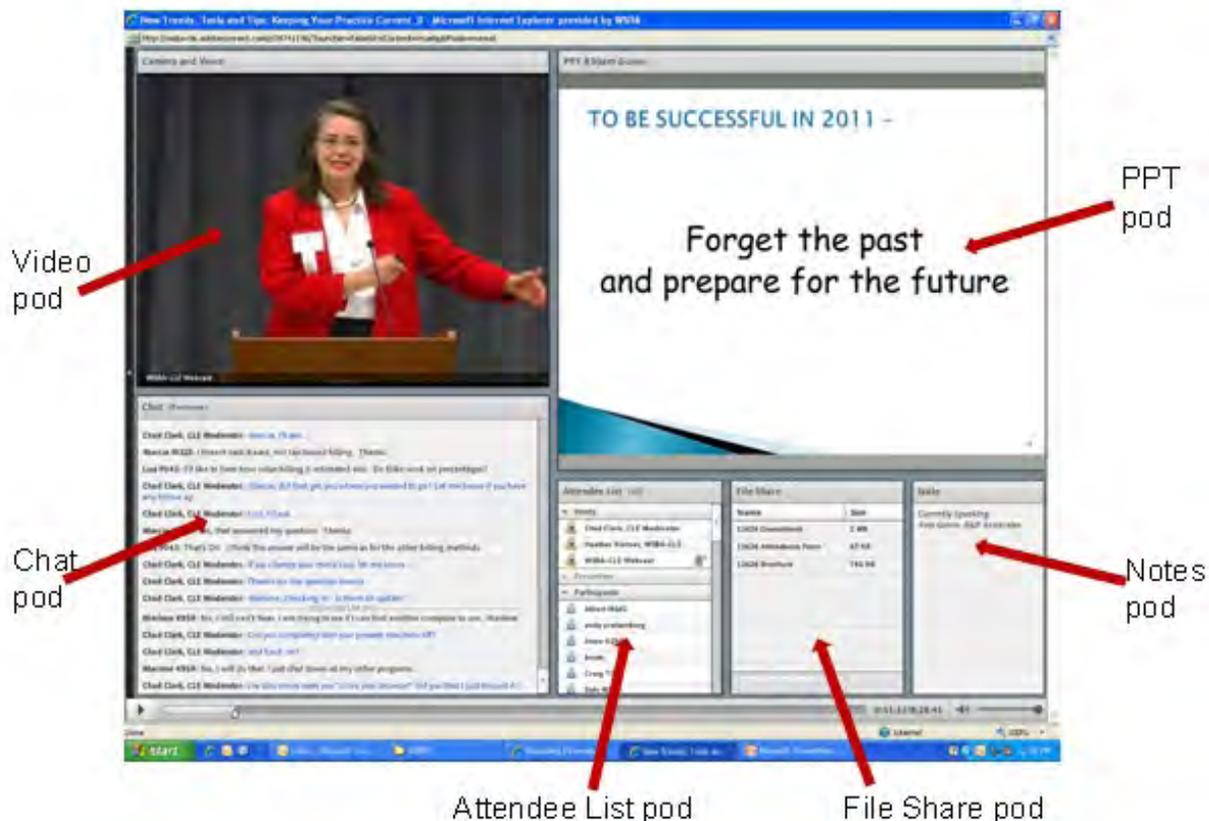
Web demonstrations: When you want to show a website and walk through its content in real time, you must inform the Seminar Developer in advance. You will need to schedule two practice runs with the Seminar Developer and the Webcast Team prior to the seminar day.

As with all things related to the seminar, if you have any questions or concerns, please contact the Seminar Developer and s/he will work with you.

4B

The Online Participants Webcast Set-up

Below you see an example of a standard WSBA-CLE webcast screen, with different areas (called pods) for video and presentation materials. This is how online participants experience the webcast:



- Video pod –** Shows streaming video of the stage/speakers
- Presentation pod –** Shows PowerPoint® presentations and is updated by the moderator in sync with what the on-site participants are seeing
- Chat pod –** Allows online participants to chat with the webcast moderator and each other
- Attendee List pod –** Lists who is currently logged on to the webcast
- File Share pod –** Contains links to documents for participants to download, such as the coursebook and attendance forms
- Notes pod –** A place for the Moderator's notes to the online participants, used to denote who is speaking or direct attendees to download materials, etc.

See the next page for an example of what the online participants see when you offer polling questions

The Online Participants

Online Polling Questions

4C

Polling questions can be used to gather a variety of information and to engage the online participants in your presentation. The example below shows polling questions (pre-submitted by the faculty) to gain insight into the makeup of the online participants. These questions were also asked of the on-site participants.

The screenshot shows a web browser window displaying a WSBA-CLE poll interface. The interface is divided into several sections:

- Camera and Video:** A large black area with the WSBA-CLE logo and the text "Webinar 412 Webinar".
- Chat:** A chat window on the left side showing a conversation between participants. The chat text includes: "Beginner #1233: George is opening, there is playing 3000 Pin Fantasy and I had my hand off. Thanks.", "Chad Clark, CLE Moderator: George, we have a and there you focusing on the coming all day to learn from your webinar experience it a good one. We have to help to any time there are have a question please visit our website about the program and we will help you get the most out of the webinar. We will be recording as well.", "Cand #1211: Do we need to join and read the questions first for 10000?", "Chad Clark, CLE Moderator: Good Question Cand. You will need to complete the registration form (downloaded from the WSBA website) it also asks a bunch of questions. WSBA-CLE will report all questions and will be able to help you if you have any questions.", "Cand #1211: Great. Thank you and I will read the questions first for 10000.", "Chad Clark, CLE Moderator: You are welcome.", "David #1211: Is there a certificate to give us as we complete our 9 questions?", "Chad Clark, CLE Moderator: Good question David. You don't need the certificate to report online - just the 9th on screen. But if you do need a certificate you can pay your annual fee for \$10000 at wsba.com.", "David #1211: Great. Thank you much.", "Chad Clark, CLE Moderator: You are welcome."
- Polling Questions:** Six poll questions are displayed in a grid. Each question has a progress bar and a "Poll" button. The questions are:
 - Q1: Are you a lawyer? (Yes: 100%, No: 0%)
 - Q2: Of the lawyers, how many years of experience do you have? (0-9 years: 18.6%, 10-19 years: 18.6%, 20 or more: 18.6%)
 - Q3: Of the lawyers, how many have been licensed by the state regarding a case? (Yes, I do: 18.6%, No, I do not: 41.87%)
 - Q4: How many people maintain a professional website? (Yes, I do: 18.6%, No, I do not: 11.2%)
 - Q5: How many people blog? (Yes, I do: 18.6%, No, I do not: 11.2%)
 - Q6: How many people use social networking, either socially or professionally? (Yes, I do: 18.6%, No, I do not: 11.2%)
- Attendee List:** A table listing participants with columns for Name, Date, and Status.
- File Share:** A table listing files with columns for Name, Date, and Status.

When polling questions are added, the pods can be shifted over to incorporate your questions. The online participants answer questions by clicking the poll answer buttons.

It is also possible to do polling questions on-the-fly as situations arise during your session; however, having ample lead time to set questions up produces better results.

If you would like more information about using polling questions, please ask your Seminar Developer. They will work with you and the webcast team.

PowerPoint® Layout Guide

PowerPoint® Best Practices:

1. Limit Slide Content

- 6 lines
- 30 numbers
- 42 words
- Use no more than two fonts

2. Choose easy-to-read fonts

Title Fonts

- Arial Black
- Helvetica
- Verdana
- Title Size: 36 – 44 point

Content Fonts

- Arial
- Calibri
- Tahoma
- Verdana
- Content Size: 24 – 32 point

3. Contrast between background and text

Use a light background with dark text, or a dark background with light text. Make sure someone reading from the back of the room can distinguish words from background on each slide.

4. Slide Images

Use .jpg images for the best result

5. Transitions

Try not to have text layer on top of each other between slide transitions. This could make text difficult to read during the webcast presentation and in the coursebook. Limit transitions and animations.



Problem:

This presenter has lots of excellent narrative information to share – but it is too much to read on a slide – especially for a webcast participant.

Solutions:

1. Instead, copy the information from the slide into a Word document and include it in your coursebook chapter.
2. Then, create a series of slides that highlight your key points, and reference the written materials during your presentation.

EXAMPLE:

This Slide Has Too Much Info, But at Least It Is Badly Arranged

Where do we start? Where to start! Your eye really doesn't know either, does it? Let's start with color, three font sizes and two font colors. Too many. And because they do not contrast enough it is hard to make out the words – and the serif font is not preferred. Finally, the RPC doesn't really need to be copied verbatim here.

RULE 1.15A SAFEGUARDING PROPERTY (a) This Rule applies to (1) property of clients or third persons in a lawyer's possession in connection with a representation and (2) escrow and other funds held by a lawyer incident to the closing of any real estate or personal property transaction. Additionally, for all transactions in which a lawyer has selected, prepared, or completed legal documents for use in the closing of any real estate or personal property transaction, the lawyer must ensure that all funds received or held by the Closing Firm incidental to the closing of the transaction, including advances for costs and expenses, are held and maintained as set forth in this rule or LPORPC 1.12A. The lawyer's duty to ensure that all funds received or held by the Closing Firm incidental to the closing of the transaction are held and maintained as set forth in this rule or LPORPC 1.12A shall not apply to a lawyer when that lawyer's participation in the matter is incidental to the closing and (i) the lawyer or lawyer's law firm has a preexisting client-lawyer relationship with a buyer or seller in the transaction, and (ii) neither the lawyer nor the lawyer's law firm has an existing client-lawyer relationship with the Closing Firm or an LPO participating in the closing. (b) A lawyer must not use, convert, borrow or pledge client or third person property for the lawyer's own use. (c) A lawyer must hold property of clients and third persons separate from the lawyer's own property. (1) A lawyer must deposit and hold in a trust account funds subject to this rule pursuant to paragraph (h) of this Rule. (2) Except as provided in Rule 1.5(f), and subject to the requirements of paragraph (h) of this Rule, a lawyer shall deposit into a trust account legal fees and expenses that have been paid in advance, to be withdrawn by the lawyer only as fees are earned or expenses incurred. (3) A lawyer must identify, label and appropriately safeguard any property of clients or third persons other than funds. The lawyer must keep records of such property that identify the property, the client or third person, the date of receipt and the location of safekeeping. The lawyer must preserve the records for seven years after return of the property. (d) A lawyer must promptly notify a client or third person of receipt of the client or third person's property. (e) A lawyer must promptly provide a written accounting to a client or third person after distribution of property or upon request. A lawyer must provide at least annually a written accounting to a client or third person for whom the lawyer is holding funds.

Reporting Your Credits

Faculty Benefits

In addition to contributing to the profession, WSBA-CLE faculty and chairs receive these tangible benefits:

- Complimentary registration and coursebook for the seminar.
- In some cases, the ability to register a guest at one-day programs. If available, you will receive a complimentary registration form with this faculty handbook. Check with the Program Lead or Program Coordinator if you're not sure if it's available.
- Reimbursement of Expenses. Reasonable travel, lodging, and meal expenses incurred by faculty are reimbursable, subject to state guidelines. However, there are strict budgetary limits on these expenses and the size of budgets will vary from seminar to seminar. Some programs may have specific reimbursement policies which we will provide. A copy of the expense report form is included in this chapter and outlines the reimbursement limits and procedures.

MCLE Reporting of Faculty Credits

Under MCLE rules (APR 11.6), WSBA-CLE tracks your credits and will report your actual attendance at the seminar. Therefore, it is important to sign in when you arrive. If you do not attend the entire seminar, please fill out a time adjustment form (available in your course book) and submit it to the Program Coordinator prior to leaving the seminar.

Preparation Time Credit

In addition to your speaking and seminar attendance time, you can earn CLE credits for preparing your presentation. However, you must report your preparation time. (The PC cannot do this.) You can claim the actual hours spent preparing, up to the maximum.

Credits: Faculty may claim one credit for each 60 minutes actually spent preparing the presentation of a course, up to a maximum of 10 credits per course. This applies to both individual and panel presenters. A lawyer may earn credit only *once* for teaching or participating in the same accredited course, regardless of the number of times that it is presented.

Chairs: Unfortunately, CLE preparation time credit is not available for Program Chairs unless the Chair presents a topic or serves on a panel.

To claim preparation credits:

- 1) From the WSBA home page, www.wsba.org, log in to your personal member page using the "myWSBA" log-in at the top right corner.
- 2) On the left side menu bar, click on "MCLE". This will bring up your MCLE Roster.
- 3) Click on "Add Activity."
- 4) On the left side, click on "Speaker or Panelist Prep Credit."
- 5) Click on "Select" next to the course you participated in. The course must be listed on your roster before you can request preparation credits.
- 6) Complete the Form 1 Prep Time application and be sure to submit to WSBA (see the "submit to WSBA" box on bottom of form).

Credits and Expenses

Your Expense Report

6B

You will receive an expense report like the one below. Please fill it out and send it, along with attached original receipts, to the Program Lead.

WSBA-CLE
1325 4th Avenue, Suite 600
Seattle, WA 98101-2539



WSBA

2012 – 2013 EXPENSE REPORT

See reverse side for WSBA Expense Policy. Please fill out clearly and completely. Reimbursement checks will be payable only to the person incurring the expense, as documented by receipts. Original, signed expense reports must be submitted within 60 days of incurring the expense but in no event later than 30 days after the WSBA fiscal year end (September 30). To expedite reimbursement, mail this form directly to your staff liaison at:

Washington State Bar Association, 1325 4th Avenue, Suite 600, Seattle WA 98101-2539.

<input type="checkbox"/> WSBA Employee <input type="checkbox"/> WSBA Board/Committee/ Council/Task Force/Panel/ Section/CLE Staff Liaison:	Make check payable to (print): Address: <input type="checkbox"/> Check if new address E-mail (only used if questions about this request): _____ Phone: _____ By my signature below, I represent that these expenses comply with the WSBA Expense Policy and have not been reimbursed by any other source: _____ Bar #: _____ Date: _____
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EXPENSE REIMBURSEMENT REQUEST (original, detailed receipts required)

	Meeting Date(s):								Category Totals
	Event: →								
	Meeting Location:								
Transportation	Auto Mileage Total (\$ 0.565/mi)		miles		miles		miles		
	Ground Trans, Parking, Tolls <i>(Receipt required if over \$25)</i>								
	Airfare (coach/economy only)								
Meals	Breakfast (up to \$12)								
	Lunch (up to \$18)								
	Dinner (up to \$36)								
	Lodging (up to \$150/night; \$180/night in Seattle + tax)								
	Other Expenses (itemize):								
	Totals								

For WSBA Use Only					
Submitted by: _____					
Date: _____					
Approved by: _____		Date: _____		Rush approval: _____	
Date: _____		Date: _____		Date: _____	
Account Name	Account #	Dept.	Job Code	Bar #	Amount
Vendor #	Date Rec'd in AP			Total:	

Credits and Expenses

WSBA Expense Policy

Summary of WSBA Expense Policy*

General Policy Statement/Scope/Liability: The WSBA has, since its inception, been dependent upon the contribution of time and talent from its members without compensation. However, it is the intent of the WSBA Board of Governors to fairly compensate the volunteers of the WSBA for their out-of-pocket expenses while exercising fiscal constraint with its members' funds. This policy applies to all volunteers and staff while engaged in authorized WSBA work. The WSBA will not reimburse expenses that are reimbursed to the volunteer or employee from another source.

Travel/Transportation Expenses: Reimbursement will be made for reasonably necessary travel expenses. Participation in meetings by telephone and carpooling with other staff/volunteers is encouraged. Reimbursement of travel expenses to out-of-state, funded committee members to attend committee meetings is limited to the approximate cost of in-state travel. The approximate cost of in-state travel is deemed to be the cost of traveling from the nearest Washington border.

Private Auto - Mileage & Parking: Reimbursement will be made at the rate of 56.5 cents per mile, plus tolls and parking. In the event that private auto is used in lieu of commercial air transportation, the lesser of coach/economy class air fare or auto mileage will be reimbursed. No reimbursement will be made for lodging en route. Airport parking must be reasonable. Persons are encouraged to park in a less expensive shuttle lot if possible. For long time periods, airport parking will be reimbursed at the lower of actual parking costs or an airport shuttle to/from the person's home. **Receipts for parking shall be provided if available. A receipt must be provided for all parking expenses greater than \$25. However, if a receipt is not available, up to \$75 may be paid if the Expense Affidavit Form is completed.**

Airfare: Reimbursement will be made at coach/economy-class air fare only. Volunteers shall seek the lowest possible fares through use of advance booking. The WSBA may or may not reimburse for last-minute fares when the date of a meeting or event was known in enough time to obtain a lower standard fare. The WSBA does not reimburse for the use of frequent flyer coupons or air miles. **Reimbursements will not be paid without a detailed receipt (must include name of passenger, date of flight, and departure and destination locations – credit card statements are not acceptable).**

Rental Cars/Other: Rental cars may be used only when necessary and economically practical compared to other modes of local transportation or if local transportation is nonexistent. Rental charges should be net of any discounts and will be limited to the rental cost of compact or standard-size cars. Reimbursement for any other method of travel (e.g., train) will be reimbursed for the cost of the most economical method of travel. **Detailed receipts must be provided.**

Lodging: Hotel/motel accommodations will be reimbursed up to \$150 per night (\$180 in Seattle) plus comparable taxes where an overnight stay is reasonable and prudent. Please consult your WSBA staff liaison if there is a question about whether an overnight stay is reasonable and prudent. Incidentals such as entertainment, personal phone calls, etc., are not reimbursable. Reimbursements for lodging will not be paid without a detailed receipt (must include name and location of hotel, guest name(s), date(s) of stay, and breakdown of charges for lodging, meals, telephone and incidentals).

Meals: If receipts are provided, meal expenses will be paid up to \$12 for breakfast, \$18 for lunch and \$36 for dinner, including gratuity. If no receipts are provided, the WSBA will reimburse the lower of the WSBA rate or the federal per diem rate for the location in which the meal expense was incurred (see www.gsa.gov) – **no exceptions**. If a person is in travel status all day, he/she may reallocate the per-meal allowances as desired (e.g., spend more on lunch and less on dinner). No alcohol purchases will be reimbursed and such purchases should be segregated from meal expense and paid for by the individual ordering them. If the request for meal expense is for more than one person, the name(s) of other individuals shall be noted.

Please see the guidelines that accompany the expense report you will receive for a more complete version of this summary.

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