WASHINGTON STATE
BAR ASSOCIATION

Board of Governors Meeting

Meeting Materials

August 11-12, 2023
Courtyard Richland Columbia Point
Richland, WA
Zoom and Teleconference

Board of Governors Meeting
Courtyard Richland Columbia Point, Richland, WA
August 11-12, 2023

WSBA Mission: To serve the public and the members of the Bar, to ensure the integrity of the legal profession, and to champion justice.

ALL ITEMS ON THIS AGENDA ARE POTENTIAL ACTION ITEMS

To participate call 1.888.788.0099

Friday, August 11th : Meeting ID: 891 7241 1678 Passcode: 009025
https://wsba.zoom.us/j/89172411678?pwd=M0tEaVhWSGFWSjJlYVR3WDZMZWIvQT09

Saturday, August 12th : Meeting ID: 853 8070 7626 Passcode: 365839
https://wsba.zoom.us/j/85380707626?pwd=SUgyL1ByaExaRnd4c0dQUzVYekxKUT09

FRIDAY, AUGUST 11, 2023

12:00 PM – LUNCH AND LOCAL HERO PRESENTATION

1:00 PM – CALL TO ORDER & WELCOME

CONSENT CALENDAR

☐ **CONSENT CALENDAR**

A governor may request that an item be removed from the consent calendar without providing a reason and it will be discussed immediately after the consent calendar. The remaining items will be voted on *en bloc*.

- Approve June 23, 2023, Board of Governors meeting minutes 4
- Approve FY24 Chair Appointments 9
- Approve Judicial Recommendation Committee Recommendations 45
- Approve Proposed Amendments to LGBT Section Bylaws 46
- Approve Amendments to Admissions Policies 62

MEMBER & PUBLIC COMMENT

☐ **MEMBER AND PUBLIC COMMENTS**

Overall public comment is limited to 30 minutes and each speaker is limited to 3 minutes. The President will provide an opportunity for public comment for those in the room and participating remotely. Public comment will also be permitted at the beginning of each agenda item, at the President's discretion.

STANDING REPORTS

☐ **PRESIDENT'S REPORT** ..... LM

☐ **EXECUTIVE DIRECTOR'S REPORT** 83

NEW BUSINESS

☐ **GOVERNOR ROUNDTABLE**

TREASURER ELECTION

☐ **INTERVIEW TREASURER CANDIDATES** 100

☐ **TREASURER ELECTION**

SPECIAL REPORTS

☐ **WASHINGTON SUPREME COURT BAR LICENSURE TASK FORCE** Dean Anthony Varona, Justice Raquel Montoya-Lewis

AGENDA ITEMS & UNFINISHED BUSINESS

☐ **MCLE BOARD'S SUGGESTED AMENDMENTS TO APR 11 TO REQUIRE ONE CLE CREDIT EACH IN MENTAL HEALTH AND TECHNOLOGY SECURITY** Chair Todd Alberstone, Associate Director for Regulatory Services Bobby Henry 111

☐ **SECOND READ: PROPOSED AMENDMENTS TO GR 12.2 *RECOMMENDED BY* THE WSBA EQUITY AND DISPARITY WORKGROUP** Gov. Alec Stephens and Chair Laura Siera 244

5:00 PM – RECESS

SATURDAY, AUGUST 12, 2023

8:30 AM – RESUME MEETING

☐ **PROPOSED NEW COMMENTS TO RPC 1.2 AND 8.4 RE REPRODUCTIVE HEALTH CARE SERVICES *RECOMMENDED BY* WSBA COMMITTEE ON PROFESSIONAL ETHICS, Professor Hugh Spitzer, CPE Subcommittee Member Janice Wang** 265

☐ **BUDGET AND AUDIT COMMITTEE ITEMS,** Finance Director Tiffany Lynch

- **Review Second Draft of FY 2024 Budget** 273
- **First Discussion RE 2025 License Fees** 367

MEETING REVIEW

☐ **MEETING FEEDBACK**

12:00 PM – ADJOURN

INFORMATION

- Monthly Financial Reports, Unaudited 371
- General Information 418

WASHINGTON STATE
BAR ASSOCIATION

BOARD OF GOVERNORS MEETING MINUTES

Vancouver, WA

June 23, 2023

Call to Order and Welcome (link)

The meeting of the Board of Governors of the Washington State Bar Association (WSBA) was called to order by President Dan Clark on Friday, June 23, at 9:06 AM. Governors in attendance were:

Francis Adewale
Sunitha Anjilvel
Matthew Dresden
Kevin Fay
Nam Nguyen
Kari Petrasek
Mary Rathbone
Serena Sayani
Alec Stephens
Brent Williams-Ruth

Also in attendance were Deputy Executive Director Dua Abudiab, President-Elect Hunter Abell, Gov. Elect Tom Ahearne, Pam Anderson, Rick Bartholomew, Gov. Elect Todd Bloom, Executive Administrator Shelly Bynum, Zachary Davison, Chief Disciplinary Counsel Doug Ende, Volunteer Engagement Advisor Paris Eriksen, Chief Regulatory Counsel Renata Garcia, Family Law Section Liaison Nancy Hawkins, Mason Ji, Gov. Elect Kristina Larry, Director of Finance Tiffany Lynch, Sections Program Specialist Carolyn MacGregor, Outreach Specialist Mike Kroner, James Macpherson, Member Engagement Specialist Curtiss Melvin, Executive Director Terra Nevitt, Chief Communications Officer Sara Niegowski, Broadcast Services Manager Rex Nolte, Communication Strategies Manager Jennifer Olegario, Sophia Palmer, Webcast Specialist Clay Peters, Director of Advancement Kevin Plachy, Associate Director ODC Kristen Schimpff, Kyle Sciuchetti, General Counsel Julie Shankland, Chief Equity & Justice Officer Diana Singleton, Hugh Spitzer, Immediate Past President Brian Tollefson, Member Services and Engagement Manager Julianne Unite, Gov. Elect Allison Widney, and James Williams.

Consent Calendar (link)

Pres. Clark asked if anyone wished to remove an item from the consent calendar. Gov. Stephens moved for approval. There was no discussion. Motion passed unanimously. Gov. Sayani was not present for the vote.

Member & Public Comments (link)

Jim Macpherson commented favorably on Gov. Elect Ahearne's election to the Board of Governors.

DRAFT

President's Report (link)
Pres. Clark referred to his written report in the meeting materials.

Executive Director's Report (link)
Director Nevitt referred to her written report in the meeting materials.

Governor Roundtable (link)
Gov. Stephens commented on the rise in hate, intolerance, and violence, and said that DEI supporters need to do more to speak up and speak out.

Gov. Brent Williams-Ruth said that the Washington Supreme Court's Bar Licensure Task Force is set next week to release two reports based on the past two years of work: one about alternatives to the bar exam, the other about the Character and Fitness Process.

President-Elect Abell referred to an email sent to the Board outlining his plans for a meeting schedule next year as well as request to sign up for next year's committees and liaison opportunities. He reported that he recently met with District and Municipal Court Judges and the Connelly Firm.

Gov. Elect Todd Bloom noted that last Sunday was Father's Day and sent well wishes to all father figures.

First Draft Review of FY23 WSBA Budget (link)
Treasure Adewale introduced the topic, stating that they were looking for clarity from the Board to indicate how the license fee and budget will take shape in the coming years according to their budget philosophy. Finance Director Lynch stated the objective in taking a look back at the FY24 budget retreat and identifying how those priorities inform the budget. Director Lynch presented questions to the Board to clarify its direction regarding unrestricted reserves, staffing, handling unknown budget items, WSBA facilities, and license fees. The board was largely in agreement that it is appropriate to use unrestricted reserves to support the FY24 budget and they would like to see a version of the FY24 budget and future projections that incorporate a renegotiation of the WSBA lease at Puget Sound Plaza, as well as a license fee that reman flat through 2026. The Board had mixed views on the WSBA staffing philosophy, how to account for unknown budget items, how to account for future WSBA facilities, and if they wanted to see a budget that offered alternate license fees.

Proposed Amendments to WSBA Bylaws Recommended by the Washington Young Lawyers Committee (link)
WYLC Chair Zachary Davison and At-Large representative Mason Ji spoke about the history and process behind the proposed rule change which they believe will have a positive impact on people entering the legal profession in Washington. Discussion followed about keeping the word “young” in the title of the committee, the possible impact of the change to the committee and its members, and the timing of the request. The amendments may return for a second read at a future BOG meeting.

Proposed Policy for the Administration of Supreme Court Boards Recommended by the Task Force Team Administering Zenial Involvement with Court-Appointed Boards (TAXICAB) (link)
Task Force Chair Kyle Sciuchetti informed the Board about the background and history of the TAXICAB Committee and its purpose is to clarify and strengthen the relationship/role between the WSBA and boards

created by the Supreme Court and administered by the WSBA. He commented that the recommendations only apply to court-appointed boards and are not intended to encompass changes to the WSBA Bylaws.

Executive Director Nevitt walked through the proposal and provided additional background on the challenges that the proposal seeks to address.

Discussion followed about the need for the proposal; whether it will solve the identified challenges; and the process of bringing it to the Court. The Board also took comment form Nancy Hawkins expressing concern that the proposal is unfair to Sections and will give too much power to the Supreme Court Boards.

Amendments to GR 12.2 Recommended by the WSBA Equity and Disparity Work Group (link)

Gov. Stephens presented the recommendation. He reiterated that the intent is to clarify what issues the WSBA and its entities may comment or take action on, consistent with the Supreme Court's objectives for the state bar.

Discussion followed, including how the current analysis of GR12 adversely impacts historically marginalized groups; that the DEI Council supports the change; what the change means for the WSBA and its entities; and whether there is a need to include language about *Keller* and First Amendment considerations. The amendments will return for a second read at a future BOG meeting.

Meeting Feedback (link)

Gov. Williams-Ruth and Gov. Dresden requested to bring back the BOG Chair/Liaison standing reports and discussion followed. Gov. Anjilvel asked the group to complete the feedback survey for the June 22nd DEI training. Thanks was given to Treasurer Adewale and Director Lynch for their work on the WSBA budget.

RPC 1.2 and 8.4 RE: Reproductive Health Care Services Recommended by the Committee on Professional Ethics (link-Part 1 link-Part 2)

Committee Chair Pam Anderson and member Hugh Spitzer presented the recommendation to add comments to RPC 1.2 and 8.4 that would provide guidance to attorneys regarding counseling clients on abortion and reproductive rights that may be considered illegal in jurisdictions outside of Washington state.

Discussion followed about whether the comment should be limited to reproductive rights when there could be other situations that warrant the same treatment and with respect to next steps. Gov. Fay moved to give the CPE the opportunity to revise and extend the scope of the proposed comments, consistent with today's discussion. Motion passed unanimously. Gov. Rathbone was not present for the vote.

Board Retreat

The Board held its annual planning retreat on Saturday, June 23. The retreat included discussions about the potential areas of focus for FY24.

ADJOURNMENT

At the conclusion of the retreat, there being no further business, Pres. Clark adjourned the meeting at 3:45 PM on Saturday, June 23, 2023.

Respectfully submitted,

Terra Nevitt

DRAFT

Board of Governors Meeting – Motions List
Vancouver, WA
June 23, 2023

1. Motion to approve the Consent Calendar. Motion passed unanimously. Gov. Sayani was not present for the vote.

2. Motion to give the [Committee on Professional Ethics] the opportunity to revise and extend the scope of the proposed comments [to RPC 1.2 and 8.4 regarding reproductive health care services] consistent with today's discussion. Motion passed unanimously. Gov. Rathbone was not present for the vote.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

FROM: Hunter Abell, WSBA President-elect

RE: 2023-2024 Chair Appointments

DATE: July 26, 2023

Consent: Appointment of the 2023 - 2024 WSBA committee and board chairs listed below.

The WSBA has a number of standing committees that are created and authorized by the BOG to study matters relating to the general purposes and business of the Bar which are of a continuous and recurring character. Pursuant to the WSBA Bylaws, IX(B)(1)(c), the President-elect annually selects the Chair or Vice Chair of each committee, with the BOG having the authority to accept or reject that selection. Below is the slate of WSBA committee chairs for the 2023-2024 year. The candidates' resumes are attached. All eligible members of the committees listed below were encouraged to apply for the Chair position. Additional Chair appointments forthcoming.

Committee/Board	Recommended for Appointment
Board of Bar Examiners	Chair: Bruce Turcott Vice-chair: Cathy Helman
Client Protection Board	Chair: Carrie Umland
Committee on Professional Ethics	Chair: Monte Jewell*
Continuing Legal Education Committee	Chair: Noah Williams*
Court Rules & Procedures Committee	Chair: Paul Crisalli
Diversity, Equity & Inclusion Council	Co-Chair: Raina Wagner
Law Clerk Board	Chair: Emily Rose Mowrey
Legislative Review Committee	Chair: Matthew LeMaster
Pro Bono and Public Service Committee	Co-chair: Erin Fortney* Co-chair: Parvin Price*

* new appointment.

All others are reappointments.

Bruce L. Turcott
[redacted]
(360) 701-4052 – Mobile
[redacted]

Legal Experience

Legal Editor, *Cannabis Law Deskbook,* AG Alliance (2022-present)
Track developments in cannabis law across fifty-six U.S. jurisdictions and other counties, edit annual editions and interim updates, manage two dozen volunteer authors, coordinate development of new content, and ensure the *Deskbook* reflects nationwide developments in law and policy.

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

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

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

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

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

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

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

Other Experience

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

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

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

Education and Bar Admission

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

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

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

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

Publications

Co-managing editor, Cannabis Law Deskbook, AGA/Thomson Reuters, published 2021.

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

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

Honors and Community Service

National Conference of Bar Examiners, Communications and Outreach Committee, 2021-present

State Supreme Court, Washington Bar Licensure Task Force, 2020-present

Washington State Bar Association, Equity & Disparity Workgroup, 2020-present

Chair, Board of Bar Examiners, Washington State Bar Association, 2020-present; member, 2007-2020

Founding Chair, Conference of Western Attorneys General AG Alliance Cannabis Project Advisory Council, 2019-20

Chair, National Association of Attorneys General Informal Cannabis Working Group, 2018-present

Frequent presenter on cannabis law, client advice, and administrative law, including UW Law School six times

Compact of Free Association Islander Health Care Program Advisory Committee, 2018-present

Arbitrator, Financial Industry Regulatory Authority, 2013-present

Attorney General's Excellence Awards, 2012, 2013, 2018; Performance Plus Awards, 2007-present

Volunteer, WSBA Call to Duty – Pro Bono Legal Services for Veterans

Volunteer Judge, University of Washington School of Law moot court and national competitions

Former Board member and officer of Capitol Land Trust; negotiated conservation easements

Member by invitation, American Society of Legal Writers

American Jurisprudence Award, Professional Responsibility

Won first-year law school moot court competition

CATHY M. HELMAN
[redacted] ◦ SPOKANE, WA [redacted]
[redacted]
[redacted]

June 21, 2023

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

Dear Bar Leaders,

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

The position as vice-chair of the Board of Bar Examiners has provided an opportunity to view the bar exam from a new angle. I've learned more about the processes that go into developing and administering the bar exam. I have worked with the bar leaders to insure that the bar exam provides a fair and equitable process for admission into the Washington State Bar Association and the practice of law. I look forward to continuing in this role and using my experience to maintain the integrity of the bar exam and the grading process.

Thank you for your consideration.

Sincerely,

Cathy M. Helman

CATHY M. HELMAN

[redacted] ◦ SPOKANE, WA [redacted]
[redacted] ◦ [redacted]

EMPLOYMENT

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

- Hears appeals for denial and termination of public assistance and overpayment of benefits

Burke Law Group, PLLC, Spokane**,** WA
Associate — July 2015- May 2018

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

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

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

United States Attorney's Office, Eastern District of Washington, Spokane, WA
Legal Intern for Pamela DeRusha, Civil Chief — May 2010- November 2010

- Drafted indictment and prosecution memo concerning Native American repeat sex offender
- Wrote office memos on Indian Law Issues, including a Indian Country property lease dispute

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

- Drafted decisions for prisoner Personal Restraint Petitions

EDUCATION

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

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

PROFESSIONAL AFFILIATIONS

Washington State Bar Association — Admitted May 2011

- Board of Bar Examiners- Exam grader — February 2014- Present

COMMUNITY INVOLVEMENT

Volunteer Lawyers Program — June 2013- December 2018

- 2014 Fundraising Volunteer of the Year

Our Lady of Fatima Parish Council — July 2014- June 2018

- 2016-17 Council Chair

From: Carrie Umland
To: Bar Leaders
Subject: [External]Client Protection Board Chair
Date: Monday, June 26, 2023 2:16:25 PM
Attachments: image001.png
2023 Resume.pdf

> You don't often get email from carrie@palacelaw.com. Learn why this is important

Greetings Bar Leaders:

I am applying for the Chair of the Client Protection Board. I have served on this committee since 2014 and had the honor of chairing it the past two years. I love participating in the important work this board does for the community.

I would be honored to chair this Board again next year.

Thank you for your consideration,

Carrie Umland

Carrie Umland
Attorney at Law
Palace Law
4009 Bridgeport Way West Suite B
University Place, WA 98466
P 253-254-5876
F (253) 627-3095
Carrie@palacelaw.com
www.PalaceLaw.com



CARRIE D. UMLAND

Professional Summary

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

Skills

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

Work History

PALACE PERSONAL INJURY LAW GROUP – University Place, WA
Personal Injury Attorney, 2012 to present

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

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

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

Earlier Positions

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

DAVID A. LARSON, P.S., – Federal Way, WA
Associate Attorney, 1995 to 1998

Education & Credentials

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

DVORA | Jewish Family Service 1601 16th Ave Seattle WA 98122 <mjewell@jfsseattle.org>

June 26th, 2023

Board of Governors
Washington State Bar Association
1325 Fourth Ave., Ste. 600
Seattle, WA 98101-2539 By electronic mail only: <*barleaders@wsba.org*>

Re: Application of Monte Jewell to chair Committee on Professional Ethics

Dear WSBA President-Elect Abell:

This is to request appointment to serve as chair of the WSBA Committee on Professional Ethics for the 2023-24 term. My resume accompanies this letter.

I've felt privileged to serve as a CPE member since October 1st, 2019. During that time, I've completed a variety of rewarding subcommittee tasks with my CPE colleagues and WSBA stakeholders, including consultation with our community of pro bono and civil legal aid providers. My interest in serving the CPE as its chair is rooted in more than 25 years of continuous, full-time work on behalf of survivors of gender-based violence, in both legal and community-based roles, in Washington, California, and Montana.

I believe we do our best work for the CPE when we accountably consider issues under the RPCs from the diverse and intersectional perspectives of our many WSBA stakeholders. Through our equitable practice, lawyers honor the words of the preamble to our RPCs and work to fulfill our special responsibilities for the quality of justice.

This is the perspective I will bring to chairing the CPE if appointed.

Thank you for your kind attention to this request.

Sincerely,

Monte Jewell

Encl

Monte L. Jewell
Project DVORA | Jewish Family Service, 1601 16th Ave., Seattle, WA 98122
mjewell@jfsseattle.org (206) 861-8783

Legal Experience

Managing Attorney - Project DVORA | Jewish Family Service, Seattle, WA 2020 - Present

- Full-time litigation practice with primary emphasis on gender violence issues.
  - Represent survivors in domestic relations, civil protection order, and other civil matters
  - Share educational and technical assistance with community-based survivor advocates
  - Represent Project DVORA at community stakeholder meetings
  - manage all aspects of Project DVORA civil legal aid services

Attorney - YWCA Sexual Violence Legal Services Program, Seattle, WA 2017 - 2020

- Full-time litigation practice with primary emphasis on gender violence issues.
  - Represent survivors in civil protection order, criminal privacy and other civil matters
  - Share educational and technical assistance with community-based survivor advocates
  - Represent SVLS at community stakeholder meetings
  - Participate in collaborative, community-centered institutional and policy advocacy

Attorney - Private law practice emphasizing gender violence issues, Missoula, MT 2002 - 2012

- Full-time family law litigation practice with primary emphasis on gender violence issues.
  - Worked with coordinated community response against rape and domestic violence
  - Maintained three pro bono partner violence cases by agreement with local shelter
  - Accepted state public defender appointments to represent gender violence survivors and children in abuse and neglect proceedings and federal criminal defense trial and appellate appointments as part of Montana Criminal Justice Act Panel
  - Notable appellate advocacy included: *Massee v. Thompson* (Mont. Sup. Ct. No. 03-0567) (*amicus*) and *Hendershott v. Westphal* (Mont. Sup. Ct. No. 10-0434) (*en banc*)

Manager Domestic Violence Unit - Montana Legal Services Association, Butte, MT 2000 - 2002

- Managed full litigation caseload for the six rural counties surrounding the city of Butte, MT.
- Managed two full-time staff, local *pro bono* program, professional education classes, and participated in coordinated community response with community stakeholders.

Associate Attorney - Alterowitz Law Offices, Missoula, MT 1997 - 2000

- Worked in general litigation practice emphasizing complex family law matters.
- Practice also included transactional work, civil litigation, federal criminal and banking law.
- Maintained cases for low-income and pro bono clients referred by Montana Legal Services Association, Criminal Justice Act Panel and YWCA of Missoula.

Administrative Experience

Project Manager - Coalition Ending Gender-Based Violence, Seattle, WA 2016 - 2017

- Coordinated Office on Violence Against Women project examining domestic violence, family law, and mental health with King County Bar Foundation, Sound Mental Health, LifeWire shelter program and other community stakeholders.
- Duties included wind-up and transitioning of grant activities including collaborative meetings, revision, publication and translation of Family Law Toolkits, organization and management of survivors' support classes, and critical community dialogues on domestic violence, mental health, and family law issues.

Executive Director/Consultant - Rape Counseling Services of Fresno, Fresno, CA 2012 - 2016

- Managed 'turnaround' period and directed 24-hour sexual assault program with advocacy, primary prevention and therapy services, with .75M budget of VOC, VAWA, OVW-LAV, RPE and private funds, metro and rural offices, 10 full time staff and 20 temporary, part time staff.
- Duties included oversight of all staff and programs: Fund development; writing and managing grants; community outreach and mobilization; coordinated community response; recruiting and training professional interns and staff; recruiting academic partners; updating and maintaining policies and procedures; liaising with public entities and stakeholder; facilitating case management reviews and improvements; recruiting board members to reflect diversity of community; and obtaining state certification for revised 40-hour training for sexual assault counselors that supports racial and gender equity and trauma-informed practice.
- Primary accomplishments:
    - Organized and facilitated community stakeholder meeting to reinvigorate mission of RCS and to shift RCS to a community-accountable, distributed-leadership model
    - Lead writer and organizer in partnership with Central Valley Health Policy Institute on 4-year, competitive grant award for Spanish language community engagement in rural western Fresno county to co-create rape prevention education action plan
    - Restored independently-audited solvency of agency and engaged new donor network
    - Organized new clinical field intern placement sites with Fresno State School of Social Work Education, School of Public Health and Women's Studies Program
    - Organized and managed fundraising events to recruit new donor network
    - Expanded coordinated community response network to include Fresno State, Mexican Consulate, and Southeast Asian, Muslim, LGBTQ and disability advocacy groups
    - Bureau of Immigration Appeals recognition and accreditation mentoring project

Teaching/Training Experience

Co-facilitation, Sexual Violence Legal Services Program, Seattle, WA 2018 - 2021

- *The Trauma-Informed Advocate: Understanding and Advocating for High Needs Clients*, National Legal Aid & Defender Association 2018 Annual Conference.
- *Ethical Considerations*, 2018 Sexual Assault Trauma-Informed Victim Empowerment Continuing Legal Education Training.
- *Identifying and Advocating for High Needs Clients*, 2018 Justice and Hope Domestic Violence and Sexual Assault Conference.

- *Managing Secondary Trauma & Creating Community Care*, Washington Office of Civil Legal Assistance, 2018 Statewide Legal Advocate Training.

Guest Lecturer, University of Montana, School of Law, Missoula, MT 2014 - 2016

- Taught advocacy for gender violence survivors facing court-ordered alternative dispute resolution.
- Taught collaboration between lay advocates and attorneys helping survivors of gender violence.

Adjunct Faculty, Gender Studies Program, Fresno State University, Fresno CA 2015 - 2016

- Taught Gender Studies Program introduction to sociology of rape and sexual assault.
- Taught supervisory practices for lay advocates and sexual assault response counselors.
- Facilitated discussions of sexual assault on U.S. campuses and facilitated discussion about issues raised in the Book *Missoula* by Jon Krakauer, *Trauma and Recovery* by Judith Herman and *Redefining Rape* by Estelle Freedman.

Appointments / Admissions

Washington State Bar Association, Committee on Professional Ethics	2020 -
Washington Supreme Court **- Washington State Bar No. 52190**	2017 -
Regional Representative, California Coalition Against Sexual Assault	2013 - 2015
Montana Supreme Court Commission on Self-Represented Litigants	2007 - 2010
United States Court of Appeals for the Ninth Circuit	2003 -
Montana State Bar Ethics Committee	2001 -
Tribal Court of the Confederated Salish and Kootenai Tribes	1999 -
Montana State Supreme Court- **Montana State Bar No. 4297**	1997 -

Community Work

Chair, **Kehillah Subcommittee on Halachic Prenuptial Agreements**	2022 -
Board of Directors, **Coalition Ending Gender-Based Violence**	2018 - 2022
Member, Finance Committee, **Coalition Ending Gender-Based Violence**	2018 - 2022
Member, **Coalition for Rights and Safety for People in the Sex Trade**	2017 - 2021
Mentor, RCS Fresno, **BIA Recognition & Accreditation Capacity-Building Project**	2015 - 2021
Lead, **End Valley Gender Violence Network, Fresno**	2015 - 2017
Lead, **Fresno County Sexual Assault Response Team Community Survey**	2014 - 2015
Advisor, **Legal Assistance to Crime Victim Advocate Attorney Panel**	2011 - 2012
Advisory Committee, **Planet Kids Supervised Visitation & Exchange Center**	2007 - 2011
Member, **Guardian *Ad Litem* Reform, *Ad Hoc* Committee**	2006 - 2008
President, Member, Board of Directors, **Blue Mountain Women's Clinic**	2003 - 2006
Board of Directors, **Missoula AIDS Council**	1998 - 2000

Education

Yiddish language study, Yiddish Book Center	2022 -
Graduate coursework, University of Montana, Social Work and Philosophy Depts.	2010 - 2011
J.D. - University of Montana School of Law, Awards: Erasmus Teaching, Public Interest	1997
B.A. - California State University, Bakersfield, major, philosophy (critical theory)	1991

From: Noah K. Williams
To: Bar Leaders
Subject: [External]CLE Committee Chair Application
Date: Wednesday, June 21, 2023 10:12:19 AM
Attachments: N. Williams Resume.doc

> You don't often get email from noah.williams@foster.com. Learn why this is important

Thank you for the time to review my application materials for the CLE Committee Chair position. Attached is my most recent resume.

I have long focused a portion of my volunteer activities on lawyer education. From an initial role with New Lawyer Education, to working with the KCBA CLE Committee and most recently the WSBA CLE Committee. I believe with the current Chair – Sharon Glenn – rotating off the committee I will now be one of the most senior members of that Committee. I have spoken with Sharon about the role of Chair, the time commitment, and ideas on how to be of service.

I believe I would make a good chair as I look for ways to engage with bar with new and relevant CLE topics. I hope to learn more about ways that I can best serve the WSBA staff as well in helping however I can. I look forward to the opportunity to serve,

Thank you again,

Noah Williams
(he/him)
Of Counsel

Tel: 206.816.1305 ▪ *Fax:* 206.447.9700
noah.williams@foster.com

Foster Garvey PC
1111 Third Avenue, Suite 3000
Seattle, WA 98101
foster.com
SEATTLE ▪ PORTLAND ▪ NEW YORK ▪ WASHINGTON, D.C. ▪ SPOKANE
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NOAH K. WILLIAMS

[redacted] · [redacted] · [redacted]

EXPERIENCE

FOSTER GARVEY, PC

Of Counsel Attorney in Labor and Employment Group **January 1, 2022 – Present**

- Work with inhouse counsel teams at Fortune 500 companies and large municipal organizations to address legal issues related to employment best practices including anti-discrimination policies, executive compensation, wage and hour compliance, severance reviews, and discipline.
- Lead teams of attorneys to address complex employment litigation in State and Federal Courts, including discrimination or wrongful termination claims, FMLA and Family Care Act claims, Wage Fairness and Transparency laws, ADA accommodation, trade secret and confidential information misappropriation, non-competition agreements, and wage and hour claims.
- Address all stages of discovery in litigation including taking and defending depositions and engaging in extensive written and electronic productions.
- Serve as outside counsel to advise and carry out reductions in force and applicable WARN Act and OWBPA notices and reporting.
- Address and respond to State and Federal agency inquiries and audits of employment and related practices (EEOC, WAHRC, DOL, DOJ, L&I, ESD etc.)
- Draft and revise employment agreements, Employee Stock Option programs, anti-discrimination policies, and other HR policies and standards of practice.
- Conduct confidential workplace investigations on behalf of clients.
- Present seminars and trainings on best practices relating to employment relations, anti-discrimination policies, cost savings strategies in handling employment disputes, intellectual property in employment, artificial intelligence, and trade secret protections.

REED, LONGYEAR, MALNATI & AHRENS, PLLC

Member Attorney and Operations Managing Member **January 1, 2018 – December 31, 2021**
Associate Attorney in Employment and Intellectual Property Law **November 2012 – December 31, 2017**

- Work with clients to address and improve business operations, and HR compliance.
- Prepare and guide clients in mediation and advise on risks vs. cost savings strategies.
- Argue cases and dispositive motions at administrative trials and before superior court judges.
- Examine and cross-examine witnesses. Defend employers in investigations and proceedings before State and Federal agencies.
- Oversee firm expansion and acquisition of other practices increasing number of attorneys and revenue over 25%.
- Advise clients and firm on COVID-19 best practices, compliance, and accommodation issues.

EMERY REDDY, PLLC

Associate Attorney **June 2010 – November 2012**
Rule 9 Intern **August 2009 – May 2010**

EQUAL EMPLOYMENT OPPORTUNITY COMMISSION

Judicial Extern **June 2009 – August 2009**

- Work one on one with an Administrative Law Judge with the EEOC to address claims of discrimination, harassment, disparate impact, retaliation, disability accommodation, etc.
- Prepare orders granting or denying summary judgment motions.
- Research and prepare decisions on dispositive and discovery motions.

NOAH K. WILLIAMS

[redacted] · [redacted] · [redacted]

EDUCATION

SEATTLE UNIVERSITY SCHOOL OF LAW
- Juris Doctor May, 2010, *Cum Laude,* top 20%

UNIVERSITY OF WASHINGTON
- Bachelors of Art, in Law, Society, and Justice, 2001

MASSACHUSETTS INSTITUTE OF TECHNOLOGY (MIT)
- Professional Education Certificate – No Code AI and Machine Learning, expected August 31, 2023

ACHIEVEMENTS, ACTIVITIES, AND VOLUNTEER WORK

I am actively engaged in the professional community through leadership and volunteer activities with the Washington State Bar Association and the King County Bar Association. A representative sampling of achievements, activities, and volunteer work follows:

- WSBA Continuing Education Committee, 2020 - Present
- WSBA Judicial Recommendation Committee 2020 – Present
- Washington Rising Star in Employment, 2014 through 2019
- AVVO, 10.0 Rating, Superb
- KCBA Neighborhood Legal Clinic Volunteer, Lake City, 2013-Present
- KCBA Committee for Lawyer Education, 2016-Present
- WSBA Young Lawyer Division Trustee for King County, 2012-2013
- WSBA Chair of the New Lawyer Education Committee, 2011-2013
- Recognized by the WSBA Young Lawyer Division for Outstanding Contribution, 2014
- WSBA Young Lawyer Liaison to the Labor and Employment Section, 2012-2013
- Presenter and Co-Chair of Multiple CLE courses through WSBA and KCBA, 2010-Present

PAUL M. CRISALLI

[redacted] **(206) 819-6367** [redacted]

June 23, 2023

To Whom It May Concern:

Please accept my application for reappointment as chair of the Court Rules and Procedures Committee. I have thoroughly enjoyed my time on this committee, and its important role in improving the practice of law. Between my work experience and my prior service on WSBA committees, including serving as current chair, I would provide a unique perspective and remain a hard working chair.

I have worked for the Attorney General's Office since 2012, where I handle affirmative litigation matters, campaign finance enforcement cases, complex worker safety cases, class action defense, and cross-divisional litigation support as part of the Complex Litigation Division. Before joining the AGO, I worked in private practice, first doing real estate and estate planning and then at a boutique appellate firm. I clerked for Justice Mary Fairhurst of the Washington Supreme Court, and Judge Joel Penoyar and the two Commissioners at the Court of Appeals Division II. My varied background provides a unique perspective in the many different ways to practice law.

For the WSBA, I served one full rotation on the Court Rules and Procedures Committee, and I was reappointed in 2020 to that committee. There, I helped spearhead changes to the RAPs, CRs, and ERs. I chaired the Criminal Rules Subcommittee during the 2021-2022 cycle, and I was appointed chair for the 2022-2023 cycle. As chair, I have fostered an inclusive, consensus-driven culture that is unafraid to tackle difficult issues. I have worked to improve communication between our committee and other entities who have an interest in proposed rules.

I also served a full rotation on the Judicial Recommendations Committee, which I chaired from 2018-2019. As chair I spearheaded updating the listed questions and reference forms to root out implicit or explicit biases, particularly with respect to applicants who might have disabilities. I also have chaired the King County Bar Association's appellate section and the Membership Committee, and I am presently on the Board of Trustees and serving as Secretary of the KCBA.

I apply for reappointment of the Rules and Procedures Committee as its chair because I enjoy rules, just as much as I enjoy working with the people on this committee. The committee's work helps address real problems parties face throughout litigation. These changes can streamline the process and address implicit or explicit inequities. I intend to continue to bring a calm and pragmatic leadership of the committee.

Thank you for the opportunity to contribute to the WSBA. Regardless, I have thoroughly enjoyed and found incredibly fulfilling being involved with the Rules and Procedures Committee and the Judicial Recommendations Committee. I hope to have the chance to contribute more to the Bar, the profession, and the greater community.

Sincerely,

s/ Paul M. Crisalli

Paul M. Crisalli

PAUL M. CRISALLI

[redacted] (206) 819-6367 [redacted]

EXPERIENCE

Washington Attorney General's Office, Complex Litigation Division, Assistant Attorney General | Seattle, WA | 2018-Present – Appellate Advisor (statewide) for the Complex Litigation Division; AGO Ethics Committee Co-Chair (statewide); Seattle Section Law Clerk Supervisor
Research case law, draft briefs, and manage litigation on behalf of the Attorney General in matters of public interest or of a complex nature. Example cases include affirmative litigation against the federal executive branch, cases representing judges and justices sued in their official capacity, campaign finance enforcement actions, and class action defense.

Washington Attorney General's Office, Labor & Industries Division, Assistant Attorney General | Seattle, WA | 2012-2018 – Appellate program; Complex Litigation Unit; Superior Court Program Advisor
Represented the Department of Labor and Industries (L&I) before the Board of Industrial Insurance Appeals, federal and state trial courts, and federal and state appellate courts.

Washington Court of Appeals, Division II, Judicial Clerk to Judge Joel Penoyar, Commissioners Aurora Bearse & Eric Schmidt | Tacoma, WA | 2012
Assisted appellate judge and both commissioners in researching, editing, and drafting opinions, rulings, and memoranda.

The Masters Law Group, PLLC, Associate Attorney | Bainbridge Island, WA | 2011-2012
Represented clients in civil appeals by researching and writing briefs for Washington Court of Appeals and Supreme Court on property, estate, personal injury, employment, family law, contract, and constitutional issues.

The Lawless Partnership, LLP, Associate Attorney | Seattle, WA | 2009-2011
Met with clients; drafted contracts, wills, trusts, demand letters, and discovery requests; researched property and estate planning issues; argued before Washington Court of Appeals.

Justice Mary E. Fairhurst, Washington State Supreme Court, Judicial Clerk | Olympia, WA | 2008-2009
Assisted Supreme Court Justice in researching, editing, and drafting opinions and memoranda.

Oregon Department of Justice, Trial and Appellate Divisions, Law Clerk | Salem, OR | 2006-2008
Drafted appellate briefs to state and federal courts regarding criminal and family law issues; argued before Oregon Court of Appeals; drafted trial memoranda and prepared for death penalty post-conviction cases.

Justice Paul J. De Muniz, Oregon State Supreme Court, Judicial Extern | Salem, OR | 2002-2005
Drafted memoranda regarding petitions for review; conducted legal research for opinions and law review articles.

EDUCATION

University of Oregon School of Law, J.D. | Eugene, OR | 2005-2008

- JOURNAL OF ENVIRONMENTAL LAW AND LITIGATION, Executive Editor
- Regional A.B.A. Negotiation Moot Court; Regional A.C.S. Moot Court
- Orlando and Miriam Hollis Scholarship in Civil Procedure, 2007
- Prosecution Clinic, Lane County District Attorney's Office

Willamette University, B.A. in Economics & Politics, *cum laude* | Salem, OR | 2001-2005

- Varsity Speech and Debate, 2001-2005; Varsity Golf, 2001-2005
- National Italian American Foundation's Gift of Discovery Scholarship, 2003
- American University, Washington Semester Public Law Program, 4.0 G.P.A., 2003

PROFESSIONAL INVOLVEMENT

- King County Bar Association, Board of Trustees 2020-Present, Secretary 2021-Present
- King County Bar Association, Membership Committee, Chair 2015-2019
- King County Bar Association, Appellate Section, Chair 2013-2014
- WSBA Judicial Recommendations Committee, 2014-Present, Chair 2018-2019
- WSBA Court Rules and Procedures Committee, 2010-2014, 2020-Present, Chair Oct. 2022-Present
- Attorney General's Office Ethics Committee, 2013-Present, Co-Chair 2020-Present
- William Dwyer Inn of Court, 2019-Present

PAUL M. CRISALLI

[redacted] **(206) 819-6367** [redacted]

REPRESENTATIVE CASES

- *State v. Meta Platforms, Inc.*, King Cty. Superior Ct. No. 20-2-07774-7 (case remains ongoing) - Superior court rejected 1st Amendment challenge to Washington's Fair Campaign Practices Act and ruled on summary judgment that Meta Platforms, Inc. intentionally violated the law, awarding $24 million in penalties and $10 million for attorney fees and costs.
- *State v. Eyman*, Thurston Cty. Superior Ct. No. 17-2-01546-34, Supreme Court No. 98743-2, 24 Wn. App. 2d 795 (Div. II 2022), *reconsideration denied* (matter pending on petition for review to Supreme Court) – In published opinion, Court upheld findings that an initiative promoter intentionally violated Washington's Fair Campaign Finance Act, assessing a $2.6 million penalty and $2.8 million in costs and fees and issuing an injunction. Supreme Court agreed that the injunction should not be stayed.
- *In re Tesoro Refining & Mkting*, Bd. Indus. Ins. App. No. 11 W0064 (case remains ongoing) – Our team defended the largest worker safety citation in state history resulting from a 2010 oil refinery explosion that killed seven people.
- *State of Washington v. DeVos*, W.D. Wash. No. 2:20-cv-01119-BJR - District Court enjoined a Department of Education rule interpreting the CARES Act that would reallocate funds intended for public schools to private schools.
- *State of Washington v. DeVos*, E.D. Wash. No. 2-20-cv-00182-TOR – Court enjoined a Department of Education rule interpreting CARES Act funding for institutes of higher education.
- *Cedar Park Assembly of God v. Kreidler & Inslee*, W.D. Wash. No. 3:19-cv-051810-BHS; Ninth Cir. No. ____ - Ninth Circuit affirmed dismissal of most of claims challenging Washington's Reproductive Parity Act and remanded for litigation on remaining narrow claim (case remains ongoing).
- *State of Washington v. U.S. Dep't of Homeland Security*, E.D. Wash. No. 4:19-cv-05210-RMP – Washington challenged a rule by the Department of Homeland Security interpreting the meaning of a "public charge." The rule is being amended.
- *Clark Cty. v. Maphet*, 10 Wn. App. 2d 420 (Wash. Ct. App. Div. II 2019) – Court agreed with L&I that an injured worker's ninth surgery was covered as a matter of law.
- *Dep't of Labor & Indus. v. Central Steel, Inc.*, 2019 WL 669942 (Wash. Ct. App. Div. I 2019) – Court upheld worker safety citation resulting from an injury related to the building of the Seattle Tunnel Project.
- *State of Washington v. Azar*, 2019 WL 6219541 (E.D. Wash. 2019) – Court enjoined nationwide a proposed rule by the U.S. Department of Health & Human Services that would allow any medical provider to refuse to provide services to patients on account of religious objection.
- *Delivery Express, Inc. v. Sacks*, 728 Fed. Appx. 730 (9th Cir. 2018) – Washington's worker compensation laws were not preempted by the Federal Aviation Administration Authorization Act, 49 U.S.C. § 14501.
- *Richardson v. Dep't of Labor & Indus.*, 6 Wn. App. 2d 896 (Wash. Ct. App. Div. I 2018) – Court held that an employer offered a valid light duty job offer by offering vocational classes to train the worker.
- *Western Oilfields Supply v. Dep't of Labor & Indus.*, 1 Wn. App. 2d 892 (Wash. Ct. App. Div. I 2017) – Court agreed that reaching between the jaws of a pipe fusion machine was a recognized hazard under WISHA.
- *Boyd v. City of Olympia*, 1 Wn. App. 2d 17 (Wash. Ct. App. Div. II 2017) – To be a valid protest, the communication must reasonably put L&I on notice that the worker is taking issue with some L&I decision.
- *Doe v. State*, 2017 WL 22423004 (Wash. Ct. App. Div. I 2017) – Court upheld a statute requiring sex offenders to provide advance notice before leaving the country.
- *Dep't of Labor & Indus. v. Bd. of Indus. Ins. App.*, 186 Wn. App. 240 (Wash. Ct. App. Div. I 2015) – A writ of review was unavailable for a denial by an industrial appeals judge to a request to present evidence in colloquy.
- *Fiore v. PPG Indus., Inc.*, 169 Wn. App. 325 (Wash. Ct. App. Div. I 2012) – Court held that an employee was not an administrative employee exempt from overtime wage protections.

PUBLICATIONS & ARTICLES

- Attorney General's Office Labor & Industries Division Industrial Insurance Manual (asst. ed.) (2015-2018)

- *Reverse Mortgages: A Golden Ticket or Mistake for Your Client*, American Bar Association GPSOLO Magazine, Vol. 17, No. 1 (2011)
- *KCBA Bar Bulletin*, Business of the Board monthly article (2021-Present)

CLEs

- AGO CLE - Ethics, Federalism and the Constitution (Oct. 2022) – A presentation discussing areas where ethics interact with the Constitution and Federalism
- AGO CLE – Deference to Administrative Agencies (2022) – A presentation discussing how state and federal courts approach deference to administrative agencies
- AGO CLE – Ethically Providing Significant Client Advice (2022) – A presentation on navigating the ethics of providing significant client advice
- Thurston County Bar Association – Using Social Media as Evidence (2022) – A presentation on evidentiary, legal, and logistical issues when using social media as evidence (materials were presented earlier to the AGO for a CLE)
- AGO CLE – Ethics and the Art of Persuasion (2021) – A panel discussion with judges about practicing law and adjudicating during a pandemic
- AGO CLE – Effective Public Lawyering (2021) – A presentation discussing how an assistant attorney general fulfills their ethical obligations when it is unclear as to whom is their client.
- AGO CLE – Contracts and Ethics CLE (2021) – A presentation on ethical issues AAGs and public attorneys might face when dealing with government contracts
- National Coalition of State Education Attorneys Annual Conference – Recent Litigation Against USDOE by State AGs (2020) – A presentation about litigation against federal agencies related to proposed rule changes.
- AGO Annual Ethics CLE (2019) – A presentation on the ethics of dealing with pro se litigants
- AGO Annual Ethics CLE (2017) – Panel discussion on ethical issues and the practice of law with judges from appellate courts and state courts from around the state
- KCBA Golf Tournament & Ethics CLE (2017, 2018) – Panel discussions about ethics and the practice of law with a State Supreme Court justice, a State Court of Appeals judge, and King County Superior Court judges
- AGO Training on Ethics Related to Staff (2017)
- AGO Training Video on Ethics for New Attorneys (2015)
- AGO CLE Presentation on Ethics in Discovery (2015)
- KCBA Appellate Section Monthly CLEs (as executive committee member and Chair) (2011-2014)

REFERENCES

- **Karen Forsberg,** Office of Attorney General for the State of Washington – 206-464-7363
- **Anastasia Sandstrom,** Office of Attorney General for the State of Washington – 206-464-6993
- **Brian Dew,** Office of Attorney General for the State of Washington – 206-389-2186
- **Dua Abudiab,** King County Bar Association Executive Director – 361-288-0408

RAINA WAGNER
[redacted] · **206-283-0927**· *raina.v.wagner@gmail.com*

WSBA Diversity, Equity and Inclusion Council
Washington State Bar Association
1325 Fourth Ave., Suite 600
Seattle, WA 98101-2539

June 30, 2023

Dear Paris Eriksen and Bar Leaders:

Thank you for considering my application to co-lead the WSBA DEI Council. I am excited about the opportunity to continue my work in the Diversity space in Washington State, and hopeful that my experience as a lawyer, professional communicator, woman of color, a longtime leader of a minority bar association, two-year member of the WSBA Diversity Committee and current Co-Chair will merit continuing in the post.

I bring decades of professional experience to hand. Since 2013, I have been an attorney with the global law firm K&L Gates, where I have a robust practice as a senior associate in our complex commercial disputes and construction law practice groups. As a civil litigator, I a seasoned dispute resolution and negotiation professional. As a construction lawyer, I support firm partners and clients on large-scale construction projects dealing with property law, general contracting, subcontractor relationships, and Washington regulation compliance. I have also worked on client or firm projects involving class-action defense, education law, and even some plaintiff-side litigation. Through my work with school districts, I have a solid understanding of compliance with the Washington Public Records Act, and the privacy concerns that emerge in that space.

Along with my experience teaching, guiding, and leading aspiring lawyers, I have also been a longtime mentor to young lawyers in the Minority Joint Mentoring Program, and through the semi-annual mentoring opportunities at the Loren Miller Bar Association, of which I am a former president. As a woman, non-traditional, second-career lawyer of color who has been mentored and supported by women who came before me, I know the importance of helping those who come after me to climb their career ladders. I intend to use these teaching and mentoring skills to encourage the paralegals on my team to lead and complete cross-department projects, and stretch their skills into previously unexplored new challenges.

Finally, I am proud of the work I have helped lead with Co-Chair Sunitha Anjelvel with the current DEI Council, which includes expansion of the Definition of Diversity, and leadership in the diversity of awareness of members of the Board of Governors. know the world of experiences I bring can be an asset as a leader the Council, and I hope you agree. Thank you again for your consideration.

Cordially,

Raina Wagner

RAINA WAGNER

[redacted] · 206-283-0927· *rainavaile@gmail.com*

LEGAL EXPERIENCE

K&L Gates, LLP, Seattle, WA

Senior Associate (January 2013-present)

- Commercial litigation associate at global corporate law firm; deep experience in complex disputes, e-discovery, trial preparation, mediation/arbitration, witness and deposition preparation, motion practice, legal research, contract negotiation, appeals, team leadership, junior associate supervision, and mentoring. Developed broad litigation subject matter mastery, including: defamation; toxic tort; consumer protection and product liability; Public Records Act/privacy advice; FOIA and other First Amendment; and class action defense.
- Seconded to firm client Starbucks Coffee Company in 2018-19 and 2021 to manage General Liability docket, including up to 160 active cases in U.S. and Canada. Key member of Starbucks Litigation Team, consulting with and managing the budgets of dozens of outside counsel to manage corporate defense in cases ranging from personal injury, discrimination, ADA, and defamation to premises liability and trespass; expertise also includes some corporate employment (restraining order/workplace protection order) and commercial (third-party subpoena/e-discovery).
- Construction law practice includes construction contract advice to local, national and international clients, advising on multistage, complex real estate and building projects.
- Pro bono leader: devoted 50-100 hours per year to pro bono clients seeking *vacatur* of convictions as sexual trafficking victims, and spearheading a resentencing/clemency petition.

Achievements: 2021, 2022 Best Lawyers in America (Seattle): Commercial Litigation Ones to Watch

Seattle University School of Law, Seattle, WA

Adjunct Professor (2021-2022): Taught 3L graduating students in a workshop, experiential Negotiations class, moving beyond positional bargaining and focusing on collaboration, mutually beneficial creative solutions, and justice-oriented relationship building in modern negotiation theory.

Fennemore Craig, P.C., Tucson, AZ

Legal Intern (Spring 2011): Commercial law, including medical malpractice and insurance defense.

Southern Arizona Legal Aid, Inc., Tucson, AZ

University of Arizona Mortgage & Bankruptcy Clinic Intern (Fall 2011): Managed clients going through bankruptcy, home-loan modifications and homeowner fraud litigation.

Arizona Court of Appeals, Chambers of Judge Peter Eckerstrom, Tucson, AZ

Extern (Fall 2010): Oral, written appellate practice, including drafting court of appeals decisions.

JOURNALISM AND TEACHING EXPERIENCE

The Seattle Times, Seattle, WA

Assistant Features Editor, Arts & Entertainment (2005-2009): Entertainment editor leading a team covering music, theater, Seattle nightlife and restaurants; directed new section design, and helped lead A&E coverage online.

Achievements: 2005 NEA Classical Music Fellow

Arizona Daily Star, Tucson, AZ

Assistant Features Editor, Features & Home (2000, 2003-2005): Managed team of reporters and ran production of multiple daily-section stories on Features beats ranging from neighborhood news to home and garden.

Achievements: 1999 Employee of the Year; named section editor in 2004.

University of Arizona, Tucson, AZ

Adjunct Professor (2002-2003): Taught composition and creative writing.

Graduate Assistant in Teaching (2000-2002): Taught English composition and fiction writing while earning MFA in Creative Writing.

Achievements: Post-class student surveys of Outstanding each semester.

EDUCATION

University of Arizona James E. Rogers College of Law, Tucson, AZ
Juris Doctor with Environmental Law Focus, May 2012

Achievements

- **Honors & Awards:** 2012 Outstanding Graduating Senior, College of Law; 2011 CALI Award, Education Law; Dean's List, 2012, 2011, 2010, 2009; Arizona Journal of Environmental Law & Policy Board Member (2L: Articles Manager; 3L: SME); 2009 Richard Grand Legal Writing Competition, Honorable Mention
- **Fellowships & Committees:** 2011 Constitutional Law Fellow; 2010 Writing Fellow; 2011 Member of the Student Self-Study Advisory Group for college ABA recertification; 2011-2012 Student Member of the Faculty Appointments Committee
- **Scholarships:** 2011 2L Minority Writing Program Scholar; 2010-2011 Fennemore Craig/Cal Udall Scholar; 2010-2011 G. Lynn Thompson Award; 2011 Ralph E. Long Memorial Award; 2009 Arizona Minority Bar Association Scholarship; Law College Association Scholarships, 2009-2010, 2010-2011, 2011-2012

Activities

- Black Law Students Association—2010-2011 President, 2011-2012 Director of the Tucson Urban League Community Legal Referral Clinic
- Business Law Program

University of Arizona, Tucson, AZ
Master of Fine Arts, Creative Writing, May 2002— Awarded teaching fellowships in 2000, 2001 and 2002

University of Arizona, Tucson, AZ
Bachelor of Arts, History; Minor: Journalism/Spanish, August 2000, Cum Laude, Phi Beta Kappa

Achievements

- Greek Sophomore Woman of the Year and Greek Senior Woman of the Year
- Robie Medalist: One of six annual outstanding undergraduate commencement awards

Activities

- Arizona Ambassadors: Member of student tour guide and recruitment group
- 1995 Fiesta Bowl Court: First-runner up

COMMUNITY INVOLVEMENT

Loren Miller Bar Association, Seattle, WA (2013-present)
2019-2020 President of Washington Black Bar Association, dedicated to supporting African-American lawyers and law students. Other offices: Treasurer, V.P. Membership, Webmaster.

Washington State Bar Association DEI Council (2021-present)
2022-2023 Co-Chair or council charged by Washington Supreme Court to advance diversity, equity and including in the legal profession.

King County Bar Association, Seattle, WA (2014-present)
Volunteer with KCBA Housing Justice Project and Renton Neighborhood Legal Clinic.

KUOW Public Radio, Seattle, WA (2022-present)
Member Board of Directors.

National Association of Black Journalists/Seattle Association of Black Journalists, Seattle, WA (1998-2000, 2004-2009): Member of the local and national chapters of the minority advocacy, mentoring and networking organization. Served as SABJ Secretary 2008-2009.

Southern Arizona Symphony Orchestra, Tucson, AZ (1996-2005, 2009-2012): Member (cellist) of community-based symphony, performing at least 8 concerts per season.

From: Emily Rose Mowrey
To: Bar Leaders
Cc: Katherine Skinner
Subject: [External]Law Clerk Board Chair Application
Date: Friday, June 2, 2023 1:21:49 PM
Attachments: Emily Mowrey Resume 2023.pdf

Dear WSBA Board of Governors:

I have been honored to serve on the Law Clerk Board since 2017 and to serve as Chair the Board since 2021. It has been a pleasure to help oversee the APR 6 Program during that time. As a former APR 6 Clerk, I feel strongly that this Program is an extremely valuable part of the WSBA and I appreciate the opportunity to help grow and develop the Law Clerk Program as well as helping applicants to succeed and become contributing members of WSBA.

I would be honored to continue serving the Law Clerk Board as Chair in the coming year. My fellow board members voted at our board meeting today to nominate me to continue serving as chair for this coming year as well.

I appreciate your consideration of my application to Chair the Law Clerk Board this coming year. I have attached my resume for your consideration. Please don't hesitate to ask if there is any other information I can provide in support of my application. Thank you!

Emily Rose Mowrey

Attorney at Law

Limitless Law PLLC

1313 E. Maple Street, Suite 400
Bellingham, Washington 98225
Phone: (360) 685-0145
Fax: (888) 262-4167
Email: [redacted]

This message (including any attachments) is intended only for the use of the individual or entity to which it is addressed, and may contain information that is privileged, confidential and exempt from disclosure under applicable law. If you are not the intended recipient, please notify me and then delete this message immediately. You are hereby notified that any review, dissemination, distribution or copying of this message, or the taking of any action based on it is strictly prohibited.

Emily Rose Mowrey

1313 E. Maple St, Ste 400 ◊ Bellingham, WA 98225
[redacted] ◊ (360) 483-8641

AREAS OF EXCELLENCE

Experienced Litigator & Legal Writer

◊ Compose complex contracts including settlement agreements, purchase/sale contracts & corporate mergers
◊ Draft estate planning documents - wills, living & testamentary trusts, powers of attorney & living wills
◊ Create pleadings, from Notices of Appearance to Interrogatories & Motions for Summary Judgment
◊ Craft schedules for Chapter 7 & 13 bankruptcy filings; represent debtors in Federal Bankruptcy Court
◊ Facilitate real estate transactions: leases, deeds, sale agreements, easements, deeds of trust & promissory notes
◊ Originate & file a full range of probate documents, including TEDRA Petitions & Agreements

Skilled Negotiator

◊ Intervene with creditors to settle debts for pennies on the dollar & to resolve unfair loan agreements
◊ Prepare discovery responses & trial preparation for jury trials & depositions
◊ Appear in court to obtain entry of probate & agreed orders

Community Leader

◊ Washington State Bar Association Law Clerk Program Board 2017-present (Chairperson 2021-present)
◊ Selected as a Super Lawyers "Rising Star" for 2020-2023
◊ Bellingham Roller Betties roller derby league Board of Directors, 2018-2019
◊ Bellingham/Whatcom Chamber of Commerce Young Professional of the Year, 2015
◊ President, Washington Women Lawyers, Whatcom County Chapter, 2014
◊ Recipient of the 2013-2014 Washington Young Lawyer Committee Public Service Award
◊ Designed law firm operations manuals for training legal staff; supervised & managed law firm staff & interns
◊ Experienced in screening potential new hires & coordinating employment interviews
◊ LAW Advocates legal aid volunteer, providing *pro bono* counsel assistance at "Law on the Street" events

EXPERIENCE

◊ **Attorney** – Limitless Law PLLC, Bellingham, Washington – **2014-present**
◊ **Business Law Instructor** – Whatcom Community College, Bellingham, Washington – **2016-present**
◊ **Team Lead/Attorney Advisor (GS-11) –** United States Small Business Administration – **2020-2021**
◊ **Attorney/Rule 9/Law Clerk** – Britain & Vis PLLC, Bellingham, Washington – **2007-2014**

EDUCATION

◊ Certificate of Completion - Washington State Bar Association Law Clerk Program – Seattle, Washington
◊ Bachelor of Arts in Politics – Whitman College – Walla Walla, Washington

BAR ADMISSIONS

◊ Washington State Bar Association, WSBA No. 46673

Davis Wright Tremaine LLP

Suite 3300
920 Fifth Avenue
Seattle, WA 98104-1610

Matthew D. LeMaster
206.757.8077 tel
206.757.7700 fax

mattlemaster@dwt.com

June 30, 2023

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

Re: Legislative Review Committee Chair Application

Dear Bar Leaders:

I am writing to express my interest in chairing the Legislative Review Committee (the "Committee") in 2023. I believe in the mission of the Committee and I believe I have the skill and energy to act as Chair.

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

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

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

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

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

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

Very truly yours,

Matthew D. LeMaster

cc: Sanjay Walvekar
sanjayw@wsba.org

Davis Wright Tremaine LLP



Matt LeMaster (He/Him)

PARTNER

Seattle
T 206.622.3150
F
M 206.330.1475
E mattlemaster@dwt.com

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

Education

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

B.S., University of Oregon, 1990

Admitted to Practice

Washington

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

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

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

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

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

Practice Highlights

Mergers & acquisitions

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

Outside general counsel

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

Industry expertise

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

Experience

Media and Technology

Acquisition of television stations

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

Formation and financing of Modjoul, Inc.

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

Formation and financing of Visus Therapeutics, Inc.

Managed early stage formation and investment of eye therapeutics company.

Acquisition of i1Biometrics

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

Disposition of Implement.com

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

Sale of Blueview Technologies

Represented client in sale of sonar technology company.

Sale of business for Geospiza, Inc.

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

Advanced Manufacturing and Distribution

Acquisition of Valence Surface Technologies subsidiaries

Represented client in acquisition of advanced manufacturing businesses.

NxEdge Inc.

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

Acquisitions by Convoy Supply

Represented building products company in multiple asset acquisitions.

Acquisition of Granite Building Products, Inc.

Represented acquisition of stock of building products company.

Acquisition of Icom Canada

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

Senior Living and Hospitality

Management of legal affairs for Leisure Care

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

Acquisitions by Coast Hotels

Represented client in the acquisition of hotel facilities.

Disposition of hotel properties for The Peninsula Group

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

Hotel management agreements and technical services agreements

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

Liquor licensing counsel

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

Gaming counsel

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

Memberships & Affiliations

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

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

Professional Recognition

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

Background

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

Insights

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

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

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

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

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

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

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

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

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

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

Addressing Homelessness Block by Block, 2018

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

From: Erin Fortney
To: Bar Leaders
Cc: Joyce Diaz
Subject: [External]PBPSC Co-Chair Application
Date: Friday, June 30, 2023 2:22:25 PM
Attachments: image001.png
image002.png
image003.png
image004.png
image005.png
image006.png
Erin Fortney - Resume 2023-05-10.pdf

Dear Board of Governors,

Please find attached my resume for consideration for a co-chair position, alongside Mr. Parvin Price, for the Pro Bono and Public Service Committee of the Washington State Bar Association for the 2023-24 bar year.

After relocating to Washington state in 2018, I was admitted to WSBA in 2019 and I have been a member of the PBPSC since 2020. Prior to moving to Washington, I practiced in metro Atlanta for many years and was an active volunteer with the Pro Bono Partnership of Atlanta, where I served many nonprofit clients with various requests. In 2016 I was awarded a Volunteer Lawyer of the Year award by PBPA.

Since leaving Atlanta, the PBPSC has allowed me to continue my pro bono efforts in a different capacity. During my tenure on the committee, we have successfully put on CLE events to help educate lawyers who want to do pro bono work and we have effectuated rules changes that have benefitted both pro bono lawyers and their clients. For the past two years, I have led PBPSC's CLE working group, and would be honored to be considered for the co-chair role in the upcoming bar year, which will be my final year on the committee.

Thank you for your consideration.

Erin Fortney

Erin Fortney | Sr. Corporate Counsel
M +1 770 490 9062

Erin M. Fortney

(770) 490-9062 • erinfortney@gmail.com

PROFESSIONAL EXPERIENCE

F5, Inc., Seattle, WA (Remote) December 2018 – Present

Senior Corporate Counsel October 2020 – Present

- Served as lead counsel to the worldwide reseller and distribution channel business, responsible for negotiating global partner agreements, assessing business risks and requirements for cross-border transactions, and maintaining current contracting documents.
- Negotiated complex commercial agreements with large enterprise, service provider, and government customers (hardware, licensed software, subscription software, SaaS, professional services, maintenance and support services) with favorable risk profiles consistent with market and corporate standards.
- Provided primary legal support to hardware manufacturing group, including drafting and negotiation of manufacturing, joint design, supplier, and OEM agreements, and advising on supplier dispute issues.
- Created for department-wide use a licensing agreement negotiation document containing standard customer asks, company position, relevant law, and suggested fallback provisions.
- Provided due diligence support in M&A transactions, as well as post-close integration planning and execution.
- Managed business disputes and oversaw outside counsel in negotiation and settlement discussions in litigation.

Corporate Counsel December 2018 – September 2020

- Drafted, reviewed, and negotiated commercial agreements, including sales, reseller, professional services, OEM, and vendor agreements.
- Managed outside counsel review of matters on specialized topics such as data processor agreements.
- Provided legal advice, risk analysis, and recommendations to key business stakeholders on various issues.

Fiserv, Inc., Alpharetta, GA April 2014 – November 2018

Senior Counsel January 2017 – November 2018

- Served as trusted advisor in providing business, regulatory, and transactional counsel to leadership of business units representing $1.6B in revenue and highest year-over-year growth company-wide.
- Acted as lead counsel in negotiations of complex, multi-million-dollar software and technology services agreements with top-25 financial institutions.
- Acted as lead counsel in negotiations of Zelle® person to person payment services deals, including 3 of the top 5 U.S. credit unions and 8 top-50 U.S. banks.
- Negotiated vendor service agreement with top-5 U.S. bank to enable additional payment transaction capabilities for the company's funds transfer services clients.
- Minimized corporate risk and liability in multiple contract renewal negotiations, including $75M renewal with an $80B financial institution.
- Managed and trained non-attorney legal professionals in both direct and indirect capacities.

Staff Counsel April 2014 – December 2017

- Negotiated transition services agreement and managed legal integration for acquisition of $200M asset purchase; served as lead legal counsel for acquired business lines.
- Supported business in development of new sales channels in emerging vertical markets, including negotiating client contracts and advising business on relevant regulatory issues.
- Drafted and maintained sales contract templates and self-serve templates for down market sales channels.

Associate, McKesson Technologies Inc., Alpharetta, GA June 2012 – April 2014

- Successfully negotiated largest quality assurance software and services contract to date with a Canadian provincial health authority.
- Conducted due diligence and prepared key risk memorandum for General Counsel and other senior law leadership for strategic acquisitions, and lead post-close legal integration efforts of acquired companies.
- Worked with business and legal leadership teams to prepare and negotiate distributor and support agreements in connection with divestiture of international operations.
- Drafted and negotiated software licensing, maintenance, and services agreements with customers and third-party vendors.
- Managed customer disputes and drafted any correspondence or contracts necessary to provide resolution.
- Drafted and maintained sales contract templates for new software products.
- Coordinated volunteer and employee giving efforts for the Windward campus (2,000+ employees).

Executive Director, Find A Way Home, Roswell, GA January 2010 – June 2012
- Managed multi-phase $2.4 million federal grant application involving multiple stakeholders.
- Negotiated favorable work-out agreement on a commercial loan, avoiding adverse consequences for agency.
- Expanded organization's capacity to serve residential clients by 40% through private partnerships.
- Oversaw fiscal activities, e.g., grant writing and reporting, budgeting, compliance, and donor tracking.
- Developed and implemented new procedures for risk management, client intake, and volunteer training.
- Administered expenditures and ensured compliance with HUD regulations for federal grant funds.
- Secured over $350,000 in grant funding during the first six months with the organization.

Of Counsel, The Counts Law Group, Atlanta, GA July 2009 – December 2009
- Drafted pleadings, motions and other documents in libel, copyright, and other civil litigation cases.
- Conducted extensive research and drafted memoranda on novel issues surrounding service of process, renewal statute, anti-SLAPP, and federal civil RICO claims.
- Conducted pre-publication libel reviews to ensure absence of client liability for defamation upon publication.
- Composed articles for submission to trade publications on recent court orders favorable to media client.

Associate Attorney, Ballinger & Associates, Canton, GA June 2008 – June 2009
- Represented clients on various domestic and family law matters, including divorce, child custody, child support and family violence protective orders, as well as other civil litigation and general corporate matters.
- Appointed to serve as *guardian ad litem* to make recommendations to the Court in juvenile proceedings.

Judicial Law Clerk, Superior Court, Augusta Judicial Circuit, Augusta, GA July 2007 – May 2008
- Performed legal research tasks on specific points of law relevant to cases before the bench.
- Implemented widely-used file review protocol to accelerate case closure process, eliminating outstanding case load within two months.
- Drafted appellate opinions in cases appealed from administrative agencies to the Superior Court.
- Developed comprehensive standardized parenting plan forms utilized by judges and attorneys circuit-wide.
- Prepared final orders for divorce, custody modification, legitimation, adoption, and child support cases.

EDUCATION

University of Georgia School of Law, J.D., *Cum laude*

Cornell University, B.S. Communication, *Magna cum laude*, Distinction in Research

COMMUNITY INVOLVEMENT

Volunteer Attorney, Pro Bono Partnership of Atlanta
- Recognized as a 2015 Volunteer of the Year
- Drafted documents such as settlement agreements, software licensing agreements, liability waivers, policy manuals, and volunteer applications.
- Presented workshop on legal responsibilities of non-profit board members.
- Advised non-profit organizations on contractual and statutory compliance issues.

Member, Pro Bono and Public Service Committee, Washington State Bar Association
- Incoming co-chair, 2023-24
- Chair, CLE working group

ADMISSIONS

- State Bar of Georgia
- Washington State Bar Association

From:	Price, Parvin
To:	Paris Eriksen
Cc:	Joyce Diaz; e.fortney
Subject:	[External]Co-Chair -PBPSC
Date:	Monday, June 19, 2023 11:52:43 AM
Attachments:	image003.png image005.png image009.png Price Bio.pdf

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Board of Governors
Washington State Bar Association

Ladies and gentlemen,

Please accept this email as my letter of interest in serving the Pro Bono and Public Service Committee (PBPSC) of the WSBA as a co-chair for the upcoming fiscal year. I am currently an active member of the PBPSC. Recently, I was asked by the current co-chairs to consider assisting Erin Fortney, another member of our committee as her co-chair. I quickly agreed.

As you look through the roster of the current members of the Washington State Bar, you will notice that I became a member in 2020 (bar number 57675); and that roster will also show me under my full name, Lester Parvin Price Jr. From 1977 through 2021, I was actively engaged in practice and in my community in Indianapolis, IN. I have attached a PDF of the bio my former firm prepared which summarizes my education, work, and community involvement during that period.

As you consider this request, you may wonder what prompted me to move from Indianapolis to Bothell WA. The simple answer is grandchildren. Instead of 2500 miles away, they are now 3 miles away. My joinder of the bar was designed to allow me to continue to be involved with the profession I enjoy, even if retired.

Thank you for your consideration of this request. I look forward to assisting you, the WSBA, and this committee in serving the citizens of Washington.

Best regards,
Parvin Price

L. Parvin Price | Retired Of Counsel
Barnes & Thornburg LLP
11 South Meridian Street, Indianapolis, IN 46204
Direct: (317) 231-7721 | Mobile: (317) 691-7040



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BARNES & THORNBURG LLP



Parvin Price

Of Counsel (Retired)

P 317-231-7721
parvin.price@btlaw.com

EDUCATION

University of Louisville, (J.D.), 1977

University of Evansville, (B.A.), 1974

BAR ADMISSIONS

Indiana

COURT ADMISSIONS

U.S. Court of Appeals for the Seventh Circuit

U.S. Court of Appeals for the Sixth Circuit

U.S. District Court for the Southern District of Indiana

U.S. Supreme Court

LANGUAGES

English

As Indiana's first ever Utility Consumer Counselor and a past deputy attorney general for the state, industry outlier Parvin Price offered decades of honed experience in all areas of utility and energy law, including natural gas, electricity and water, and assisted clients in the funding of various infrastructure improvement projects.

Parvin represented investor-, cooperatively- and municipally-owned utilities, as well as industrial or wholesale customers, before the Indiana Utility Regulatory Commission, the Indiana Department of Environmental Management, and trial and appellate courts throughout the region. He also advised organizing groups on the creation of new operating entities interested in providing utility services in Indiana.

Notably, during Parvin's service as Indiana's first Utility Consumer Counselor from 1981 to 1985, all Indiana utilities were regulated. Over the last decades, numerous utilities have become deregulated. However, Parvin's deep experience allowed him to advise clients subject to regulation and those outside of regulation on how to avoid the mistakes of their predecessors.

Regardless of the economic or regulatory climate, Parvin was an industry veteran who knows the terrain and how to lead utilities through the obstacles they face, including the recurring historic changes that continue to occur. He was appreciated by clients and colleagues alike for his multidimensional experience, sage perspective and ability to offer solutions in a manner that is easily understood. When Parvin's clients were faced with an issue that requires flexibility, he demonstrated the requisite agility and acute know-how to guide them toward the desired result.

Parvin was a frequent speaker on issues of utility management and state agency regulation. He currently serves as general counsel for the Alliance of Indiana Rural Water. Parvin also works with Indiana regulators and his Utility Consumer Counselor successors on myriad issues facing the industry today.

Professional and Community Involvement

Member or former member, Indianapolis Bar Association, Indiana State Bar Association, American Water Works Association, Indiana Rural Water Association, Indiana Regional Sewer District Association, Indiana Municipal Lawyers Association, Indiana Energy Association, Indiana Municipal Electric Association, and Electric Cooperative Bar Association

Former board member and past president, Metropolitan School District of Pike Township Board of Directors, 1990-1998

Honors

The Best Lawyers in America, 2007-2022

Recipient, Sagamore of the Wabash (Indiana's highest civilian honor)

Recipient, Indiana General Assembly concurrent resolution recognizing his work as Utility Consumer Counselor

Martindale-Hubbell, AV-rated

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

FROM: Susan Brye, Chair, WSBA Judicial Recommendation Committee; Sanjay Walvekar, Staff Liaison to the Judicial Recommendation Committee

CC: Terra Nevitt, Executive Director

DATE: July 24, 2023

RE: WSBA Judicial Recommendation Committee June 8, 2023 Interviews and Recommendations

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

The WSBA Judicial Recommendation Committee met via Zoom on June 8, 2023 for the purpose of conducting interviews with four individuals interested in being considered for future openings on the Washington State Court of Appeals. Per committee guidelines approved by the Board of Governors, the proceedings and records of the committee, including applicant names, committee discussions, and committee votes, are kept strictly confidential. The committee's recommendations are available in the Governor's materials via the WSBA cloud-sharing service.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: WSBA LGBT Law Section Executive Board

DATE: July 7, 2023

RE: Amendment of Section Bylaws

[ACTION]: The LGBT Law Section recently voted to amend the Section's bylaws to (1) rename the Section the "LGBTQ+ Law Section," and (2) allow inactive members of the Bar to join the Section and serve in Section leadership and is seeking approval from the WSBA Board of Governors.

The proposed changes to the Section Bylaws are intended to reflect the Section's dedication to support understanding among WSBA members of the legal needs of LGBTQ+ residents of Washington. Our hope is that the proposed changes help to communicate the inclusive nature of the Section and encourage additional involvement by previously non-voting members.

Background

The proposed changes to the Section's Bylaws were first discussed by the Section's Executive Committee in 2022. At that time, the Executive Committee felt that it would be appropriate to change the Section's name to reflect the diversity of the LGBTQ+ community in Washington. The Executive Committee similarly hopes that allowing inactive members of the Bar, such as retired attorneys, to vote and hold leadership positions will promote Section participate by members with diverse experiences, ideas, and points of view.

This is the first time this request is coming before the Board of Governors.

Community Input

The proposed changes to the Bylaws have been discussed during Section meetings on multiple occasions, including during the Section's 2022 annual meeting. During these meetings, the proposed changes have been widely supported. The Executive Committee voted to approve the amended Bylaws during an open meeting on June 20, 2023.

Information for Fiscal Analysis

We do not anticipate any fiscal impact from the proposed changes.

Information for Equity Analysis

We believe that changing the name of the Section to the LGBTQ+ Law Section will reflect the Section's focus on inclusion and the diversity of Washington's LGBTQ+ population.

Allowing inactive members of the Bar to vote and participate in Section leadership will further our Section's goals of inclusion and further our efforts to engage members of our community.

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

The proposed changes do not present legal risk.

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

The LGBT Law Section currently charges an annual dues rate of $30.00 per member, has a FY22 fund balance of $11,647.99, and a FY23 budgeted net loss of $3,452. The proposed action to allow inactive members of the Bar to join the section could result in increased membership revenue and corresponding direct expenses for providing programmatic benefits to section members and expenses for WSBA Per-Member Charge costs ($17.66 per member for FY23).

Additionally, there is fiscal impact to WSBA resulting from the proposed changes includes a limited amount of staff time used to incorporate amendments in Section records. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and would not require additional staff or allocation of resources from other internal sources.

WSBA EQUITY ANALYSIS: *This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.*

The stated purpose of the proposed change to add "Q+" to the section's name is to communicate the section's desire to be more inclusive of the LGBTQ+ community. The stated purpose of the proposed change to allow inactive members to serve in section leadership is to promote more diversity of experiences, ideas and points of view. Both proposals appear to advance diversity, equity and inclusion. To apply an equity lens to the process and center those most impacted, it would be helpful for the section to seek input from the LGBTQ+ community who are not necessarily members of the section, and inactive members who have been involved with the section.

Attachments
Proposed Amended Bylaws (Tracked Changes)
Proposed Amended Bylaws (Clean Version)

WASHINGTON STATE
BAR ASSOCIATION

LESBIAN GAY BISEXUAL TRANSGENDER QUEER ("LGBTQ+") LAW SECTION

Helping Lawyers Better Serve LGBTQ+ Clients

Bylaws

As last amended and approved by the
Washington State Bar Association Board of Governors on July 27, 2017.

1.0 Establishment of Section

The Lesbian Gay Bisexual Transgender Law Section (LGBTQ+ Law) of the Washington State Bar Association (hereinafter referred to as "Section") is hereby established pursuant to the Bylaws of the Washington State Bar Association (hereinafter referred to as "Bar").

2.0 Purpose and Aspirations

The purpose and jurisdiction of the Section shall be to:

- Help members better serve their lesbian, gay, bisexual, ~~and~~ transgender, and queer (LGBTQ+) clients;
- Improve understanding by members of the Bar of the legal needs of LGBTQ+ individuals in the State of Washington, which are often different from, and in addition to, those faced by the population at large;
- Support the efforts of Section members to achieve the highest standards of competence, professionalism and ethics in their practices;
- Assist LGBTQ+ residents of Washington state, and those who represent them, to better understand how their legal needs can be met;
- Promote the study of gay, lesbian, bisexual, transgender, queer, and gender identification law, and report on laws, decisions, and governmental regulations as they may affect the rights, responsibilities, and needs of ~~gay, lesbian, bisexual, or transgender people~~LGBTQ+;
- Provide a cooperative structure through which research and publications in the field of sexual orientation and gender identification issues can serve the needs of all members of the Section

and Bar;

- Provide a cooperative structure through which members of the Bar who are interested in sexual orientation and gender identification legal issues can work together to better understand the issues in the field and to develop and implement effective problem-solving approaches;

- Act as a liaison between the Bar, its Board of Governors, state and national LGBTQ+ organizations and committees of other state bars and other organizations dedicated to serving the needs of the LGBTQ+ community~~itizens~~;

- Take action to raise the visibility of LGBTQ+ people and to increase the knowledge and awareness of legal issues facing the LGBTQ+ community.

- Assist the efforts of the executive committee in any work undertaken with the Legislature, within the scope of General Rule 12, to enact and improve laws affecting members of the LGBTQ+ community~~itizens~~ and to assist the Judiciary in the administration of justice as it pertains to the LGBTQ+ ~~citizens~~community.

- Take on tasks as requested by the executive committee and membership of the section to implement section goals and policies.

3.0 Membership

3.1 Any Active or Inactive member of the Bar may be a voting member of the LGBTQ+ Law Section and eligible for election to office in the LGBTQ+ Law Section upon request and payment of annual Section dues.

3.2 Any professor at a Washington law school (whether licensed in Washington or not), ~~Emeritus~~ Pro Bono member (APR ~~8~~3(~~e~~g)); House Counsel pursuant to APR 8(f), or any lawyer who is a full time lawyer in a branch of the military who is stationed in Washington but not licensed in Washington may be a voting member of the LGBTQ+ Law Section and eligible for election to office in the Section.

3.3 Law students ~~and any inactive Bar members~~ and others not otherwise eligible for section membership may be nonvoting Section members ("subscribers") at a standard annual dues fee set by the Board of Governors (for law students) or at an annual dues rate proposed by the executive committee and approved by the Board of Governors (for ~~inactive Bar members and~~ others not otherwise eligible for section membership). Upon a majority vote of the executive committee as part of the Section's annual budget-drafting process, the executive committee may vote to subsidize all or part of the standard annual dues for law student subscribers.

3.4 Dues shall be paid annually in advance, in an amount to be determined by the executive committee and approved by the Board of Governors. Any person who fails to pay the annual dues shall cease to be a member of the Section.

3.5 The annual Section dues shall be used to support the activities of the Section according to the bylaws of the Section, as authorized by the executive committee, approved by the Board of Governors and in compliance with the Bar's fiscal policies and procedures.
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4.0 Meetings of the Membership

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4.3 Notice of the annual meeting, midyear meeting, and any special meetings shall be published on the Bar's website.

4.4 Approval of any business brought before the membership at any annual, midyear, or special meeting of the Section shall be made by a majority vote of the members present in person, present telephonically or by videoconference, present by proxy, or who have submitted ballots by mail or electronic mail prior to the meeting date.

4.5 Members may cast their vote by proxy, by mail, or by electronic mail, or may appear telephonically with written notice to the Secretary of the Section. Members may request a written ballot from the Secretary of the Section no less than 5 days prior to the meeting at which a vote is to be taken. To vote by proxy, a member must send written notice to the Secretary of the Section designating another specific voting member of the Section to cast the proxy vote. Notice must be sent to the Secretary at least 5 days prior to the meeting at which a vote is to be taken.

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a. Chair;
b. Chair-elect;
c. Immediate Past Chair
d. Secretary;
e. Treasurer; and
f. Up to 5 At-Large members
g. The positions of Chair-elect, Chair, or Immediate Past Chair may be held simultaneously by two individuals who will serve as co-chairs.

5.2 The executive committee shall meet a minimum of six (6) times per year.

5.3 The executive committee shall be vested with the powers and duties necessary for the administration of the affairs of the Section including, without limitation, the power and duty to act on behalf of the Section in connection with the activities listed in §2.0. The executive committee shall have sole authority to approve the content and publishing of the Section newsletter and/or website, and the adoption of the budget and approval of expenditures, and shall perform duties assigned to it by the Board of Governors of the Bar.

5.4 The executive committee shall have the authority to determine the number and type of Section

committees and sub-committees and shall appoint Chairs for all committees and sub-committees. All members of the Section may serve on any committee or subcommittee at the discretion of the executive committee.

5.5 A majority of the executive committee shall constitute a quorum, and may be present in person, by telephone or by videoconference. Action of the executive committee shall be determined by majority vote of the members of the executive committee, once a quorum is established. Executive committee members may vote by email in accordance with the Bar's Bylaws.

5.6 Special meetings of the executive committee may be called to amend these bylaws upon ten (10) days written notice of such meeting mailed or emailed to the members of the Section, and published on the Bar's website. The Notice will specify the purpose of such special meeting and the proposed amendment, as set forth in Article 10 hereof.

5.7 At-Large members, who shall be voting members, shall serve in an advisory capacity to the Section and shall assist the executive committee as follows:

(a) To support the efforts of Section members to achieve the highest standards of competence, professionalism and ethics in their practices;

(b) To assist the efforts of the executive committee in any work undertaken with the Legislature to enact and improve laws affecting members of the LGBTQ+ ~~citizens~~ community and to assist the Judiciary in the just administration of those laws; and

(c) To take on tasks as requested by the executive committee and membership of the section to implement Section goals and policies.

5.8 Any officer or other member of the executive committee may be removed by a two-thirds majority vote of the executive committee. Grounds for removal include, but are not limited to, regular absence from executive committee meetings and events, failure to perform duties, unprofessional or discourteous conduct or whenever, in the executive committee's judgment, the executive committee member is not acting in the best interest of the Section membership.

The executive committee will appoint, by majority vote, members to fill vacancies on the executive committee. When a member is appointed to fill a vacancy in an unexpired term, the member will do so until the next annual election when an individual will be elected to serve the remainder of the vacated term.

6.0 Officers

6.1 The officers of the Section shall be the Chair, Chair-elect, Immediate Past Chair, Secretary and Treasurer.

6.2 The Chair shall be the principal executive officer of the Section and, subject to the executive committee's control, shall supervise the affairs of the Section. The Chair shall preside at meetings of the Section and the executive committee.

6.3 On expiration of the Chair's term, the Chair-elect shall automatically become the Chair. The Chair-elect shall perform such duties as shall be assigned to him or her by the Chair or by the

executive committee. The Chair-elect shall perform all of the duties of the Chair in the absence or inability to act of the Chair.

6.4 The Immediate Past Chair shall act as the Chair of the nominating committee.

6.5 The Secretary shall take minutes of all meetings of the Section and executive committee, provide approved minutes to the Bar for publication and record retention, and perform other duties as assigned by the Chair or executive committee.

6.6 The Treasurer will work with the Bar to ensure that the Section complies with Bar fiscal policies and procedures, work with the Bar to prepare the Section's annual budget, and review the Section's monthly financial statements for accuracy and comparison to budget. The fiscal year of the Section shall correspond to the fiscal year of the WSBA.

7.0 Elections

7.1 The Chair-elect, Secretary, and Treasurer, shall be elected each year, and At-Large Members of the executive committee shall be elected every two years by the membership. Nominations and elections for open positions will be held between March and May each year. The Bar will administer the elections by electronic means and certify the results, unless the Section develops its own equivalent electronic election process. In the event of a tie, the winner will be determined by coin toss.

7.2 All executive committee positions will begin October 1 each year. Officers will serve a one-year term, and At-Large members will serve two-year terms. At-Large members will be divided into two groups (A, three members, and B, two members) with terms expiring in alternating years.

7.3 The executive committee or Chair shall appoint a nominating committee no later than 90 days prior to the Annual Election for the purpose of nominating interested qualified persons. The nominating committee shall consist of no fewer than three members of the Section, at least one of whom is not a current member of the executive committee.

7.4 All applicants will apply through an electronic process administered by the Bar. The executive committee will also have an alternative process to allow for nominations to occur outside of the nominating committee process. The nominating committee may nominate more than one candidate for each position. The executive committee will approve a list of nominees for each position. Persons nominated through an alternative nomination process will be included on the final list of approved nominees. Notice containing the names of nominees selected by the nominating committee shall be provided to voting members of the Section no later than 30 days prior to the annual election. The notice shall include names of persons nominated and the positions to which they have been nominated.

8.0 Amendment

8.1 These bylaws may be amended by either of the following means: (1) at any annual meeting of the Section by a majority vote of the members of the Section present in person, by telephone, or by videoconference; (2) at any regular or special meeting of the executive committee of the Section called for the purpose of amending the bylaws upon at least 4 four (4) days' written notice to the members thereof, by a majority vote of all members of the executive committee,

once a quorum is established. No amendment of these bylaws will be effective until approved by the Board of Governors of the Washington State Bar Association.

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WASHINGTON STATE
BAR ASSOCIATION

LESBIAN GAY BISEXUAL TRANSGENDER QUEER ("LGBTQ+") LAW SECTION

Helping Lawyers Better Serve LGBTQ+ Clients

Bylaws

As last amended and approved by the
Washington State Bar Association Board of Governors on July 27, 2017.

1.0 Establishment of Section

The Lesbian Gay Bisexual Transgender Law Section (LGBTQ+ Law) of the Washington State Bar Association (hereinafter referred to as "Section") is hereby established pursuant to the Bylaws of the Washington State Bar Association (hereinafter referred to as "Bar").

2.0 Purpose and Aspirations

The purpose and jurisdiction of the Section shall be to:

- Help members better serve their lesbian, gay, bisexual, transgender, and queer (LGBTQ+) clients;
- Improve understanding by members of the Bar of the legal needs of LGBTQ+ individuals in the State of Washington, which are often different from, and in addition to, those faced by the population at large;
- Support the efforts of Section members to achieve the highest standards of competence, professionalism and ethics in their practices;
- Assist LGBTQ+ residents of Washington state, and those who represent them, to better understand how their legal needs can be met;
- Promote the study of gay, lesbian, bisexual, transgender, queer, and gender identification law, and report on laws, decisions, and governmental regulations as they may affect the rights, responsibilities, and needs of LGBTQ+;
- Provide a cooperative structure through which research and publications in the field of sexual orientation and gender identification issues can serve the needs of all members of the Section and Bar;
- Provide a cooperative structure through which members of the Bar who are interested in

sexual orientation and gender identification legal issues can work together to better understand the issues in the field and to develop and implement effective problem-solving approaches;

- Act as a liaison between the Bar, its Board of Governors, state and national LGBTQ+ organizations and committees of other state bars and other organizations dedicated to serving the needs of the LGBTQ+ community;

- Take action to raise the visibility of LGBTQ+ people and to increase the knowledge and awareness of legal issues facing the LGBTQ+ community.

- Assist the efforts of the executive committee in any work undertaken with the Legislature, within the scope of General Rule 12, to enact and improve laws affecting members of the LGBTQ+ community and to assist the Judiciary in the administration of justice as it pertains to the LGBTQ+ community.

- Take on tasks as requested by the executive committee and membership of the section to implement section goals and policies.

3.0 Membership

3.1 Any Active or Inactive member of the Bar may be a voting member of the LGBTQ+ Law Section and eligible for election to office in the LGBTQ+ Law Section upon request and payment of annual Section dues.

3.2 Any professor at a Washington law school (whether licensed in Washington or not), Pro Bono member (APR 3(g)); House Counsel pursuant to APR 8(f), or any lawyer who is a full time lawyer in a branch of the military who is stationed in Washington but not licensed in Washington may be a voting member of the LGBTQ+ Law Section and eligible for election to office in the Section.

3.3 Law students and others not otherwise eligible for section membership may be nonvoting Section members ("subscribers") at a standard annual dues fee set by the Board of Governors (for law students) or at an annual dues rate proposed by the executive committee and approved by the Board of Governors (for others not otherwise eligible for section membership). Upon a majority vote of the executive committee as part of the Section's annual budget-drafting process, the executive committee may vote to subsidize all or part of the standard annual dues for law student subscribers.

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WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Renata de Carvalho Garcia, Chief Regulatory Counsel

Bobby Henry, Associate Director, Regulatory Services Department

DATE: July 20, 2023

RE: Proposed Amendments to WSBA Admissions Policies

ACTION: The Regulatory Services Department asks the Board of Governors to approve proposed amendments to the Admissions Policies of the Washington State Bar Association with an effective date of September 1, 2023.

Background

The Admissions Policies adopted by the Board of Governors supplement the Washington Supreme Court's Admission and Practice Rules (APR). Many of the policies are adopted because the Court has directed through court rule that the WSBA establish policies for various details regarding applications for the admission to the practice of law in Washington. See, for example, APR 3(i) which directs the Bar to prescribe the form and manner of the application, pay a fee set by the Board of Governors, and establish policies for refunds and transfers of applications. Other policies are adopted to ensure consistent administration and handling of all applications for admission and to provide direction to the staff of the Regulatory Services Department.

The policies were last amended in February 2022. Since then, the LLLT program is no longer accepting applications, thus there is a need to delete the requirements, filing deadlines and fees related to the LLLT license. We are also requesting changes or clarifications to policies relating to the exam application filing deadlines, testing accommodations requests, declined payments, and the exam security policy at the exam site. Finally, we suggest a few amendments to make the policies more inclusive.

Explanation of Changes

Declined EFT and Check Payments. For exam applicants, when payment is submitted via electronic fund transfer (EFT) or check and payment is subsequently declined, applicants will have one additional opportunity to resubmit payment within five business days from notification of the declined payment before late fees will be assessed or, if the notification is after the final deadline, that application will not be accepted. This will avoid late fees and disqualification for applicants who may have made a data entry error when submitting payment via EFT and is consistent with current similar procedure for returned checks.

Exam Security Policy and Exam Site. We are requesting the Board adopt a stricter policy regarding who is permitted to be at the exam sites for the LPO exam and the bar exam. WSBA requests only exam takers, WSBA staff, WSBA volunteers authorized by WSBA staff, proctors, law school representatives, WSBA and testing site vendors, and testing site staff be permitted at the exam site. Under the proposed amendments, no pets would be allowed except for certified service animals with prior approval from WSBA via the online application portal.

Washington Law Component. The proposed amendments clarify existing policy by better stating that even after passing the Washington Law Component test (WLC), if an applicant fails the UBE, or withdraws the application, or the application is disqualified, that applicant must retake and pass the WLC after applying for the next administration of the bar exam.

Effective Date

Applicants may begin submitting applications for the Winter 2024 bar exam on September 1, 2023. Therefore, we ask that the amendments take effect on September 1, 2023.

Attachments

1. Proposed Amendments to Admissions Policies – Blackline
2. Proposed Amendment to Admissions Policies – Clean

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

GR 12

This proposal is authorized by GR 12 (a)(7)[administer admission, regulation, and discipline of its members in a manner that protects the public and respects the rights of the applicant or member] and (b)(4) [administer examinations and review applicants' character and fitness to practice law] and is not prohibited by GR 12.2(c)(2).

Concerns for Discussion

The changes to the rules appear to resolve rather than create concerns. No specific concerns are noted.

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

The proposed amendments reflect inclusion of language that is similar to what is already current practice. In particular, amendments regarding Declined EFT and Check payments are consistent with current practice of providing applicants an additional opportunity to resubmit payment before a late fee is assessed. For context, the number of payments that are declined each year is minimal (6 in FY23, 32 in FY22, and 19 in FY21) and most are not assessed the late fee. Additionally, it is our current practice to providing a partial refund to non-exam applicants who are disqualified based on reasons described above. Therefore, we do not have specific concerns regarding the fiscal impact of the proposed amendments.

WSBA EQUITY ANALYSIS: *This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.*

There are no major equity concerns with the proposed changes; however, we suggest a tie between the paragraph on accommodations and the paragraph on requesting a special room so it's clearer for nursing people that they can request accommodations including a special room. While we understand that many of the proposed changes were informed by experiences that past applicants have had, we suggest seeking input or feedback from applicants who are most impacted by proposed changes.

ADMISSIONS POLICIES OF THE WASHINGTON STATE BAR ASSOCIATION

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

Adopted July 1, 2012. Amended July 28, 2017, amendments effective September 1, 2017.
Amended November 14, 2020, amendments effective December 1, 2020.
Amended January 13, 2022, amendments effective February 1, 2022.
Amended August 11, 2023, amendments effective September 1, 2023.

I. GENERAL PROVISIONS AND DEFINITIONS

A. Applications

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

B. Definitions

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

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

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

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

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

~~"LLLT Applicant" means a person applying for admission as a limited license legal technician.~~

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

II. APPLICATION REQUIREMENTS

A. Application Submission Policy

All applicants must submit electronically, within the filing deadlines specified below, the following:

- a completed application in the form required by the Bar including any required supplemental documentation;
- two Certificates of Good Moral Character, dated within 6 months prior to the application date and completed by two lawyers admitted to practice law in any U.S. jurisdiction or the foreign jurisdiction in which the applicant is admitted to practice law. For ~~LLLT Applicants and~~ LPO Applicants the certificates may be completed by LLLTs or LPOs admitted to practice in Washington; and

- an Authorization and Release form. The form must be signed and notarized within 6 months prior to the application date.

In addition, Attorney Applicants must submit:

- a Certificate of Good Standing from each jurisdiction in which the applicant has ever been admitted (including federal courts and tribal courts). Certificates of Good Standing (or similar document) for Attorney Applicants admitted to practice law must be issued by the admitting authority (e.g., State Bar or highest state court) in each jurisdiction where the applicant has been admitted. If the applicant is no longer admitted in the jurisdiction, the applicant must submit a letter from the jurisdiction that includes the dates of admission and status history. The certificate or letter must be signed and dated within 6 months prior to the application date.

All documents must be in English or accompanied by a certified English translation.

B. Exam Application Filing Deadlines

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

Examination	Applications Accepted	First Deadline	Late Filing Deadline	Failed the Immediately Preceding Winter WA Exam Deadline With No Late Fee
Summer Exam	February 1	March 5	April 5	May 5
Winter Exam	September 1	October 5	November 5	N/A

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

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

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

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

C. Non-Exam Application Deadlines

Applications ~~that are~~ not submitted within six months of starting the application online will be deleted.

~~The LLLT Board or Limited Practice Board may schedule exams at times other than the lawyer bar exams and set application deadlines for those exams. Any such exams and the corresponding application deadlines will be posted on the Bar's website.~~

~~C~~D. Other Deadlines

The WSBA must complete review of an exam application and resolve any issues with the exam application no later than 18 days prior to the first day of the exam (18-day deadline). Failure of an applicant to timely comply with WSBA's requests to supplement an application with additional information or documentation or to cure a deficiency in an applicant's required forms may result in disqualification of the application due to insufficient time to complete review and process the application by the 18-day deadline for exam applications.

Request ~~ADA~~ testing accommodations ..... 80 days prior to first day of exam.
File all requested and/or additional items ..... 18 days prior to first day of exam.
Character and fitness resolution ..... 18 days prior to first day of exam.
Exam360 (laptop) registration ..... 18 days prior to first day of exam.
Change of exam method ..... 18 days prior to first day of exam.
Special requests for exam room ..... 18 days prior to first day of exam.
Withdraw from exam with partial refund ..... 18 days prior to first day of exam.
UBE Score Transfer Applications ..... No deadline, may apply at any time.
Admission by Motion Applications ..... No deadline, may apply at any time.
House Counsel ~~Applicants~~ Applications ..... No deadline, may apply at any time.
Foreign Law Consultant ~~Applicants~~ Applications ..... No deadline, may apply at any time.
Petitions for Reinstatement (after disbarment) under APR 25 ..... No deadline; see APR 25 et. seq.
Withdraw a non-exam application with partial refund ..... One year from date of application.

III. FEES

A. Fee Schedule

(1) General Applicants $585
Late Filing Fee (exam applicants only) $300

(2) Attorney Applicants $620
Late Filing Fee (exam applicants only) $300

~~(3) LLLT Applicants ..... $300~~
~~Practice Area Exam Only ..... $250~~
~~Professional Responsibility Exam Only ..... $80~~
~~Late Filing Fee ..... $150~~

(~~3~~4) LPO applicants $200

Late Filing Fee……$100

(~~4~~5) House Counsel Applicants $620

(~~5~~6) Foreign Law Consultant Applicants $620

All bank card transactions are subject to a separate non-refundable transaction fee of 2.5%. There is no transaction fee for payments by electronic funds transfer (EFT) or check.

For exam applicants, payments by check must be received or postmarked by the application deadline. Payments received or postmarked after the first deadline will incur a late filing fee ~~as outlined in section II (B)~~. Applications will not be accepted if payment is received or postmarked after the ~~final~~ late filing deadline.

For exam applicants, if an application fee paid by EFT or check is declined, then applicants will have one additional opportunity to resubmit payment within five business days from notification of the declined payment. If payment is not resubmitted within the five business days then a late fee will be assessed for applications and payment originally submitted by the first deadline. If the late filing deadline has passed and payment is not resubmitted within five business days from the notification of the declined payment then the application will not be accepted.

B. NCBE Investigation Fee

Applications for General Applicants applying under APR 3(b)(4)(B), House Counsel Applicants, Foreign Law Consultant Applicants, and all Attorney Applicants, except for applicants eligible for Military Spouse Admission by Motion ~~military spouse admission by motion~~ under APR 3(c)(2), are referred to the National Conference of Bar Examiners (NCBE) for verification and investigation of the information in the application. Applicants are required to pay a nonrefundable investigation fee to the NCBE. See section V of these policies for all NCBE requirements.

C. Withdrawals and Refunds

For all applicants, the application fee includes a non-refundable administrative processing fee as set forth below. An exam applicant must withdraw an application at least 18 days prior to the date of the examination for a partial refund. Petitioners under APR 25 and all other non-exam applicants must withdraw their applications no later than one year after filing the application to receive a partial refund. The Bar will issue a refund of the application fee less the administrative fee. The partial refund policy applies to applications that are disqualified. Any late filing fees paid, and any investigation costs are nonrefundable. For exam applications, ~~N~~no refunds will be issued for withdrawals or disqualifications made less than 18 days prior to the date of the exam. For all other applications, no refunds will be issued for withdrawals or disqualifications made later than one year after filing the application. Exam applicants forfeit all fees if they do not show up for the exam. Exam applicants cannot transfer their applications or application fees to a different exam.

~~The partial refund policy applies to applications that are disqualified~~

Administrative Fee (nonrefundable portion of application fee):

General, Attorney, House Counsel and Foreign Law Consultant Applicants $300

~~LLLT Applicants.....$150~~
LPO Applicants.....$100

If there are extraordinary circumstances that prevent an applicant from taking the examination (e.g., a serious medical emergency, death in the immediate family, significant health problems, house fire), a written request must be delivered to the Bar within 18 days after the exam in order to receive a partial refund as set forth above. The Bar may require the applicant to submit supporting documentation for the request.

~~For good cause shown, Bar staff has discretion to change the application type upon request of the applicant and transfer any application fee already paid to the new application type.~~

IV. CHARACTER & FITNESS REVIEW

All applicants are subject to a character and fitness review prior to being admitted to practice law in Washington State. The responsibility for full disclosure rests entirely upon the applicant. Permission to sit for the examination or admission to practice law may be withheld pending a hearing before the Character and Fitness Board and a final determination by the Washington Supreme Court regarding whether the applicants have met their burden of proving that they are of good moral character, fit to practice law and have met the Essential Eligibility Requirements. See APR 20-24.3. Factors considered by Admissions staff and Bar Counsel when determining whether an applicant should be referred to the Character and Fitness Board are set forth in APR 21(a).

Washington requires resolution of all character and fitness issues at least 18 days prior to sitting for the exam. Exam applicants with unresolved character and fitness issues after this deadline will not be permitted to sit for the exam and will have their application transferred to the next exam. Applicants may choose to withdraw from the exam and receive a partial refund if the request is made at least 18 days prior to the first day of the exam in lieu of transferring to the next exam. Therefore, applicants who disclose any information that may raise an issue of character or fitness are advised to file their applications early in the registration period. Early filing ~~or providing information prior to the 18 day deadline~~ does not guarantee all issues will be resolved 18 days prior to the exam.

All petitions for reinstatement under APR 25 are referred to the Character and Fitness Board for hearing, per APR 25.3(b). Petitioners will be assigned to the next available licensing exam only after receiving Washington Supreme Court approval of their petition.

V. NCBE REPORT REQUIREMENT

Applications for General Applicants applying under APR 3(b)(4)(B), House Counsel Applicants, Foreign Law Consultant Applicants, and all Attorney Applicants, except for applicants eligible for military spouse admission by motion under APR 3(c)(2), are referred to the National Conference of Bar Examiners (NCBE) for verification and investigation of the information in the application. Applicants who have an application that is referred to the NCBE will be contacted by the NCBE and required to pay an investigation fee and submit authorization and release forms directly to the NCBE. The Bar cannot finish processing applications until the report is received from the NCBE.

Applicants applying for an exam will not be allowed to sit for the exam if the Bar does not receive a report back from the NCBE at least 18 days prior to the first day of the exam; in that case, the application will be transferred to the next exam.

Applicants may choose to withdraw from the exam and receive a partial refund if the request is made at least 18 days prior to the first day of the exam in lieu of transferring to the next exam.

NCBE reports are valid for one calendar year from the date the Bar receives the completed report from the NCBE, after which a supplemental or new NCBE report will be required. See the NCBE website for additional information: http://www.ncbex.org/character-and-fitness/jurisdiction/wa.

VI. ~~REASONABLE~~ REQUESTS FOR TESTING ACCOMMODATIONS ~~UNDER THE ADA/WLAD~~

Any applicant requesting ~~reasonable~~ testing accommodations for a claimed disability must ask for such accommodations through the online admissions site at least 80 days prior to the examination date. Applicants requesting ~~reasonable~~ testing accommodations must provide appropriate documentation of the disability and specify the extent to which they are requesting that the standard testing procedures need to be modified. The applicant is responsible for demonstrating their need for any requested accommodations. Any testing accommodation may not compromise the integrity or security of the examination or affect the standards set for the examination. The Bar reserves the right to make final judgment concerning testing accommodations and may have any submitted documentation reviewed by a specialist. See the online admissions site for additional information regarding ~~accommodation~~ requests for testing accommodations and required documentation.

~~Any reasonable accommodation may not compromise the integrity or security of the examination or affect the standards set for the examination. After the Bar provides notice to an applicant of the exam accommodations granted that applicant, the applicant must acknowledge that they read and understand the accommodations granted no less than 18 days prior to the first day of the examination.~~

VII. SPECIAL REQUESTS FOR THE EXAM ROOM

For good cause shown, applicants may be permitted to bring otherwise prohibited items into the exam room. Examples of items are: pillows/lumbar supports, ergonomic chairs, book stand, wrist rest, medication, external keyboard or mouse, and religious attire ~~headgear~~. In addition, applicants may request a specific seating location in the exam room due to a medical condition.

The Bar will provide a room for nursing persons ~~mothers~~ upon request. Nursing persons ~~mothers~~ may use the nursing room before and after the exam, during breaks and during the exam. An applicant must be accompanied by a proctor if the nursing room is used during the exam session.

All special requests for an exam must be made on the online admissions site no less than 18 days prior to the first day of the exam. All requests must be supported (if applicable) by written documentation from a treatment provider ~~a doctor's note~~.

VIII. LAPTOP USE AND EXAM360 SOFTWARE

Applicants for an exam requesting to use a laptop computer for the written portions of the exam must register, pay for, and download software from ILG Exam360. Exam360 must be purchased and

downloaded for each administration of the exam, even if used in the past. Fees paid to ILG Exam360 are nonrefundable and nontransferable. Laptop users must sign a waiver of liability on exam day. Applicants who do not purchase and download the software by 18 days prior to the exam will be required to handwrite the exam.

If an exam applicant's laptop fails prior to the exam, the applicant must contact ILG Exam360 to download Exam360 again.

IX. EXAMINATION PROVISIONS

A. Exam Security Policies & Exam Site

~~(1)~~ All applicants for all exams ~~are to~~ must abide by the Exam Security Policy and any other exam policies or procedures ~~as~~ established by the Bar or the Washington Supreme Court.

Only applicants, WSBA staff, WSBA-authorized volunteers, proctors, WSBA vendors, law school representatives, and exam site staff and vendors are permitted at the exam site. No pets are allowed at the exam site. Certified service animals may be approved as part of a testing accommodations request.

B.~~A~~ Grading and Results for All Examinations

~~(1) All applicants for all exams are to abide by the Exam Security Policy as established by the Bar.~~

(1~~2~~) Grading of examinations shall be anonymous. Graders shall be provided exam answers with only the applicant ID number to identify to whom the answer belongs. Names or other personal information that would identify an applicant is not provided to the graders. All information matching names and numbers of the applicants shall be kept in the custody of the Bar until all examinations have been graded and each examination has been given either a pass or fail grade by applicant number only.

(2~~3~~) There is no review or appeal of final examination results. APR 4(b).

(34) The names of successful applicants will be posted on the Bar's website.

(4~~5~~) Unsuccessful exam applicants may reapply and retake the exam in the same manner as any other applicant.

C~~B~~. Lawyer Bar Examination

(1) All lawyer bar exam applicants must pass the Uniform Bar Exam prepared and coordinated by the National Conference of Bar Examiners. The UBE consists of Multistate Bar Exam (MBE), Multistate Essay Exam (MEE) and Multistate Performance Test (MPT) questions. The UBE is administered over two days in accordance with the procedures established by the NCBE.

(2) The Board of Bar Examiners is responsible for the grading of the MEE and MPT questions on the UBE. In order to assure fairness and uniformity in grading, the Board of Bar Examiners shall follow NCBE-prescribed standards for grading to be used by all graders. The Board of Bar Examiners shall, as soon as practicable and within any guidelines prepared by the NCBE, certify the scores on the MEE and MPT portions for all applicants who have taken the UBE.

(3) Upon completion of the grading and certification, the Bar shall cause each lawyer bar exam applicant to be notified of the result of the examination. All results shall be reported to the NCBE in accordance with procedures established by the NCBE. All scaled scores and the applicant's national percentile rank for the MBE will also be reported to the applicant's law school.

(4) All lawyer bar exam applicants will be provided with the scaled written (MEE+MPT) score, scaled MBE score, total scaled UBE score and their national percentile rank for the MBE. Unsuccessful lawyer bar exam applicants will receive copies of their written essay and performance test questions and answers and written raw scores. No other raw scores, results information or examination materials will be provided to the applicants.

D~~C~~. Washington Law Component

All applicants qualifying for admission as a lawyer under APR 3 must pass the Washington Law Component (WLC). The WLC is comprised of online materials and an online ~~multiple-choice~~ multiple-choice test based on areas or subjects of law that are specific to Washington State. The Board of Bar Examiners is responsible for the content of the WLC and shall publish the Washington state specific materials for applicants.

The WLC is self-administered by applicants and is available to applicants online after submitting the application. There is no fee to take the WLC. The WLC is an open-book test. Applicants may take the WLC as many times as necessary to achieve the minimum pass score. There is a mandatory waiting period of 24 hours after failing to pass the WLC the first time. Subsequent fails of the WLC require a 72 hour waiting period before retaking the test. The WLC minimum pass score is 80% correct. If after passing the WLC, an applicant fails the UBE, ~~or~~ withdraws ~~from the UBE~~ the application, or the application is disqualified ~~after taking the WLC~~ that applicant must retake and pass the WLC after ~~applying for the next UBE administration~~ submitting a new application.

X. UBE SCORE TRANSFER APPLICANT PROVISIONS

UBE score transfer applicants must have a qualifying UBE score and must meet one of the qualifications for lawyer bar examination applicants as set forth in APR 3(b).

UBE score transfer applicants may apply in Washington as a UBE score transfer applicant while applying in a different UBE jurisdiction to take the UBE, with the intent of transferring a qualifying score from that jurisdiction to Washington. The applicant must notify the Bar of the jurisdiction where the applicant will take the UBE.

Applicants are not permitted to apply at the same time for admission in Washington as both an applicant to take the UBE in Washington and an applicant seeking to transfer a UBE score to Washington.

ADMISSIONS POLICIES OF THE WASHINGTON STATE BAR ASSOCIATION

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

Adopted July 1, 2012. Amended July 28, 2017, amendments effective September 1, 2017.
Amended November 14, 2020, amendments effective December 1, 2020.
Amended January 13, 2022, amendments effective February 1, 2022.
Amended August 11, 2023, amendments effective September 1, 2023.

I. GENERAL PROVISIONS AND DEFINITIONS

A. Applications

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

B. Definitions

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

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

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

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

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

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

II. APPLICATION REQUIREMENTS

A. Application Submission Policy

All applicants must submit electronically, within the filing deadlines specified below, the following:

- a completed application in the form required by the Bar including any required supplemental documentation;
- two Certificates of Good Moral Character, dated within 6 months prior to the application date and completed by two lawyers admitted to practice law in any U.S. jurisdiction or the foreign jurisdiction in which the applicant is admitted to practice law. For LPO Applicants the certificates may be completed by LLLTs or LPOs admitted to practice in Washington; and
- an Authorization and Release form. The form must be signed and notarized within 6 months prior to the application date.

In addition, Attorney Applicants must submit:

- a Certificate of Good Standing from each jurisdiction in which the applicant has ever been admitted (including federal courts and tribal courts). Certificates of Good Standing (or similar document) for Attorney Applicants admitted to practice law must be issued by the admitting authority (e.g., State Bar or highest state court) in each jurisdiction where the applicant has been admitted. If the applicant is no longer admitted in the jurisdiction, the applicant must submit a letter from the jurisdiction that includes the dates of admission and status history. The certificate or letter must be signed and dated within 6 months prior to the application date.

All documents must be in English or accompanied by a certified English translation.

B. Exam Application Filing Deadlines

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

Examination	Applications Accepted	First Deadline	Late Filing Deadline	Failed the Immediately Preceding Winter WA Exam Deadline With No Late Fee
Summer Exam	February 1	March 5	April 5	May 5
Winter Exam	September 1	October 5	November 5	N/A

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

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

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

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

C. Non-Exam Application Deadlines

Applications not submitted within six months of starting the application online will be deleted.

D. Other Deadlines

The WSBA must complete review of an exam application and resolve any issues with the exam application no later than 18 days prior to the first day of the exam (18-day deadline). Failure of an applicant to timely comply with WSBA's requests to supplement an application with additional information or documentation or to cure a deficiency in an applicant's required forms may result in

disqualification of the application due to insufficient time to complete review and process the application by the 18-day deadline for exam applications.

Request testing accommodations	80 days prior to first day of exam.
File all requested and/or additional items	18 days prior to first day of exam.
Character and fitness resolution	18 days prior to first day of exam.
Exam360 (laptop) registration	18 days prior to first day of exam.
Change of exam method	18 days prior to first day of exam.
Special requests for exam room	18 days prior to first day of exam.
Withdraw from exam with partial refund	18 days prior to first day of exam.
UBE Score Transfer Applications	No deadline, may apply at any time.
Admission by Motion Applications	No deadline, may apply at any time.
House Counsel Applications	No deadline, may apply at any time.
Foreign Law Consultant Applications	No deadline, may apply at any time.
Petitions for Reinstatement (after disbarment) under APR 25	No deadline; see APR 25 et. seq.
Withdraw a non-exam application with partial refund	One year from date of application.

III. FEES

A. Fee Schedule

(1) General Applicants	$585
Late Filing Fee (exam applicants only)	$300
(2) Attorney Applicants	$620
Late Filing Fee (exam applicants only)	$300
(3) LPO applicants	$200
Late Filing Fee	$100
(4) House Counsel Applicants	$620
(5) Foreign Law Consultant Applicants	$620

All bank card transactions are subject to a separate non-refundable transaction fee of 2.5%. There is no transaction fee for payments by electronic funds transfer (EFT) or check.

For exam applicants, payments by check must be received or postmarked by the application deadline. Payments received or postmarked after the first deadline will incur a late filing fee. Applications will not be accepted if payment is received or postmarked after the late filing deadline.

For exam applicants, if an application fee paid by EFT or check is declined, then applicants will have one additional opportunity to resubmit payment within five business days from notification of the declined payment. If payment is not resubmitted within the five business days then a late fee will be assessed for applications and payment originally submitted by the first deadline. If the late filing deadline has passed and payment is not resubmitted within five business days from the notification of the declined payment then the application will not be accepted.

B. NCBE Investigation Fee

Applications for General Applicants applying under APR 3(b)(4)(B), House Counsel Applicants, Foreign Law Consultant Applicants, and all Attorney Applicants, except for applicants eligible for Military Spouse Admission by Motion under APR 3(c)(2), are referred to the National Conference of Bar Examiners (NCBE) for verification and investigation of the information in the application. Applicants are required to pay a nonrefundable investigation fee to the NCBE. See section V of these policies for all NCBE requirements.

C. Withdrawals and Refunds

For all applicants, the application fee includes a non-refundable administrative processing fee as set forth below. An exam applicant must withdraw an application at least 18 days prior to the date of the examination for a partial refund. Petitioners under APR 25 and all other non-exam applicants must withdraw their applications no later than one year after filing the application to receive a partial refund. The Bar will issue a refund of the application fee less the administrative fee. The partial refund policy applies to applications that are disqualified. Any late filing fees paid, and any investigation costs are nonrefundable. For exam applications, no refunds will be issued for withdrawals or disqualifications made less than 18 days prior to the date of the exam. For all other applications, no refunds will be issued for withdrawals or disqualifications made later than one year after filing the application. Exam applicants forfeit all fees if they do not show up for the exam. Exam applicants cannot transfer their applications or application fees to a different exam.

Administrative Fee (nonrefundable portion of application fee):

General, Attorney, House Counsel and Foreign Law Consultant Applicants..... $300
LPO Applicants $100

If there are extraordinary circumstances that prevent an applicant from taking the examination (e.g., a serious medical emergency, death in the immediate family, significant health problems, house fire), a written request must be delivered to the Bar within 18 days after the exam in order to receive a partial refund as set forth above. The Bar may require the applicant to submit supporting documentation for the request.

IV. CHARACTER & FITNESS REVIEW

All applicants are subject to a character and fitness review prior to being admitted to practice law in Washington State. The responsibility for full disclosure rests entirely upon the applicant. Permission to sit for the examination or admission to practice law may be withheld pending a hearing before the Character and Fitness Board and a final determination by the Washington Supreme Court regarding whether the applicants have met their burden of proving that they are of good moral character, fit to practice law and have met the Essential Eligibility Requirements. See APR 20-24.3. Factors considered by Admissions staff and Bar Counsel when determining whether an applicant should be referred to the Character and Fitness Board are set forth in APR 21(a).

Washington requires resolution of all character and fitness issues at least 18 days prior to sitting for the exam. Exam applicants with unresolved character and fitness issues after this deadline will not be permitted to sit for the exam and will have their application transferred to the next exam. Applicants may choose to withdraw from the exam and receive a partial refund if the request is made at least 18 days prior to the first day of the exam in lieu of transferring to the next exam. Therefore, applicants who

disclose any information that may raise an issue of character or fitness are advised to file their applications early in the registration period. Early filing does not guarantee all issues will be resolved 18 days prior to the exam.

All petitions for reinstatement under APR 25 are referred to the Character and Fitness Board for hearing, per APR 25.3(b). Petitioners will be assigned to the next available licensing exam only after receiving Washington Supreme Court approval of their petition.

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Applicants may choose to withdraw from the exam and receive a partial refund if the request is made at least 18 days prior to the first day of the exam in lieu of transferring to the next exam.

NCBE reports are valid for one calendar year from the date the Bar receives the completed report from the NCBE, after which a supplemental or new NCBE report will be required. See the NCBE website for additional information: http://www.ncbex.org/character-and-fitness/jurisdiction/wa.

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Any applicant requesting testing accommodations for a claimed disability must ask for such accommodations through the online admissions site at least 80 days prior to the examination date. Applicants requesting testing accommodations must provide appropriate documentation of the disability and specify the extent to which they are requesting that the standard testing procedures need to be modified. The applicant is responsible for demonstrating their need for any requested accommodations. Any testing accommodation may not compromise the integrity or security of the examination or affect the standards set for the examination. The Bar reserves the right to make final judgment concerning testing accommodations and may have any submitted documentation reviewed by a specialist. See the online admissions site for additional information regarding requests for testing accommodations and required documentation.

VII. SPECIAL REQUESTS FOR THE EXAM ROOM

For good cause shown, applicants may be permitted to bring otherwise prohibited items into the exam room. Examples of items are: pillows/lumbar supports, ergonomic chairs, book stand, wrist rest, medication, external keyboard or mouse, and religious attire. In addition, applicants may request a specific seating location in the exam room due to a medical condition.

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VIII. LAPTOP USE AND EXAM360 SOFTWARE

Applicants for an exam requesting to use a laptop computer for the written portions of the exam must register, pay for, and download software from ILG Exam360. Exam360 must be purchased and downloaded for each administration of the exam, even if used in the past. Fees paid to ILG Exam360 are nonrefundable and nontransferable. Laptop users must sign a waiver of liability on exam day. Applicants who do not purchase and download the software by 18 days prior to the exam will be required to handwrite the exam.

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IX. EXAMINATION PROVISIONS

A. Exam Security Policies & Exam Site

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B. Grading and Results for All Examinations

(1) Grading of examinations shall be anonymous. Graders shall be provided exam answers with only the applicant ID number to identify to whom the answer belongs. Names or other personal information that would identify an applicant is not provided to the graders. All information matching names and numbers of the applicants shall be kept in the custody of the Bar until all examinations have been graded and each examination has been given either a pass or fail grade by applicant number only.

(2) There is no review or appeal of final examination results. APR 4(b).

(3) The names of successful applicants will be posted on the Bar's website.

(4) Unsuccessful exam applicants may reapply and retake the exam in the same manner as any other applicant.

C. Lawyer Bar Examination

(1) All lawyer bar exam applicants must pass the Uniform Bar Exam prepared and coordinated by the National Conference of Bar Examiners. The UBE consists of Multistate Bar Exam (MBE), Multistate Essay Exam (MEE) and Multistate Performance Test (MPT) questions. The UBE is administered over two days in accordance with the procedures established by the NCBE.

(2) The Board of Bar Examiners is responsible for the grading of the MEE and MPT questions on the UBE. In order to assure fairness and uniformity in grading, the Board of Bar Examiners shall follow NCBE-prescribed standards for grading to be used by all graders. The Board of Bar Examiners shall, as soon as practicable and within any guidelines prepared by the NCBE, certify the scores on the MEE and MPT portions for all applicants who have taken the UBE.

(3) Upon completion of the grading and certification, the Bar shall cause each lawyer bar exam applicant to be notified of the result of the examination. All results shall be reported to the NCBE in accordance with procedures established by the NCBE. All scaled scores and the applicant's national percentile rank for the MBE will also be reported to the applicant's law school.

(4) All lawyer bar exam applicants will be provided with the scaled written (MEE+MPT) score, scaled MBE score, total scaled UBE score and their national percentile rank for the MBE. Unsuccessful lawyer bar exam applicants will receive copies of their written essay and performance test questions and answers and written raw scores. No other raw scores, results information or examination materials will be provided to the applicants.

D~~C~~. Washington Law Component

All applicants qualifying for admission as a lawyer under APR 3 must pass the Washington Law Component (WLC). The WLC is comprised of online materials and an online multiple-choice test based on areas or subjects of law that are specific to Washington State. The Board of Bar Examiners is responsible for the content of the WLC and shall publish the Washington state specific materials for applicants.

The WLC is self-administered by applicants and is available to applicants online after submitting the application. There is no fee to take the WLC. The WLC is an open-book test. Applicants may take the WLC as many times as necessary to achieve the minimum pass score. There is a mandatory waiting period of 24 hours after failing to pass the WLC the first time. Subsequent fails of the WLC require a 72 hour waiting period before retaking the test. The WLC minimum pass score is 80% correct. If after passing the WLC, an applicant fails the UBE, withdraws the application, or the application is disqualified that applicant must retake and pass the WLC after submitting a new application.

X. UBE SCORE TRANSFER APPLICANT PROVISIONS

UBE score transfer applicants must have a qualifying UBE score and must meet one of the qualifications for lawyer bar examination applicants as set forth in APR 3(b).

UBE score transfer applicants may apply in Washington as a UBE score transfer applicant while applying in a different UBE jurisdiction to take the UBE, with the intent of transferring a qualifying score from that jurisdiction to Washington. The applicant must notify the Bar of the jurisdiction where the applicant will take the UBE.

Applicants are not permitted to apply at the same time for admission in Washington as both an applicant to take the UBE in Washington and an applicant seeking to transfer a UBE score to Washington.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

FROM: Executive Director Terra Nevitt

DATE: July 24, 2023

RE: Executive Director's Report

Summer Exams

Best of luck to everyone taking the Bar and LPO Exams in Yakima this week! 60 candidates are sitting for the LPO Exam on July 24 and 699 candidates are taking the Uniform Bar Exam (UBE) on July 25-26. This the highest number of candidates we have had sit for the exam since 2017! The admissions team is being supported by 15 other WSBA staff members and 47 proctors to ensure a smooth exam for all involved.

Update on the NextGen Bar Exam

Washington is one of 42 jurisdictions that administer the Uniform Bar Exam (UBE), which is coordinated by the National Conference of Bar Examiners (NCBE) and is uniformly administered, graded, and scored. In 2018, NCBE launched a 3-year study to ensure the examination continues to test the knowledge, skills, and abilities required for competent entry-level legal practice. The project was divided into three phases: stakeholder research, practice analysis, and content and design. Guided by the results of this comprehensive study and consistent with testing standards, NCBE is now developing the NextGen Bar Exam which is set to debut in 2026.

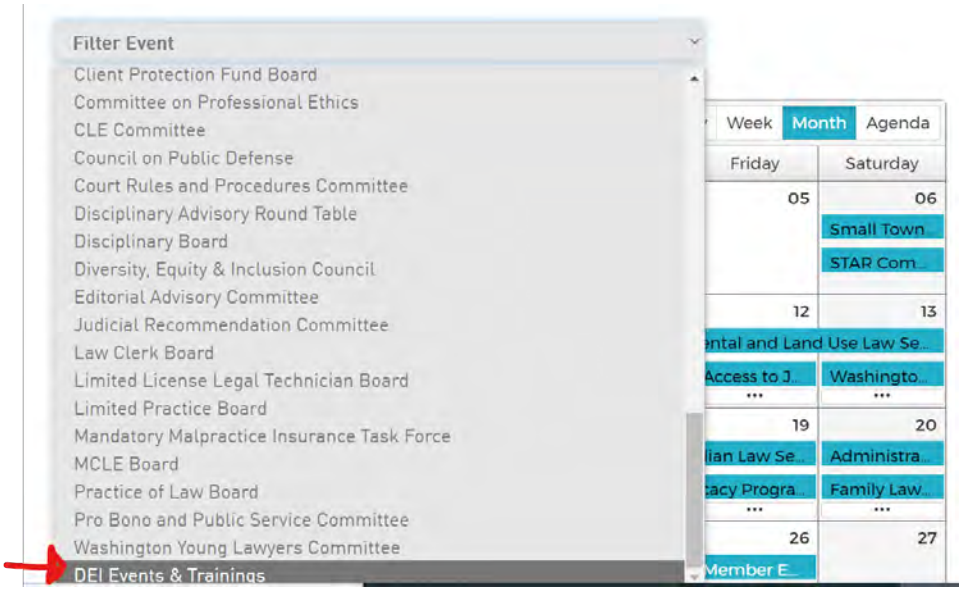
Last month, NCBE released the content scope outlines covering the breadth of material to be tested on the new exam in eight areas of legal knowledge and seven categories of practical skills and abilities (link). Pilot testing is well underway to evaluate the form, organization, and structure of the exam items. Over twenty law schools are participating in these initial rounds of pilot testing, in which law students and recent graduates answer draft questions, followed by a feedback session. You can find more information about the NextGen Bar Exam here. NCBE representatives will be joining us in Spokane in September to present to the Board information about the NextGen exam and answer your questions.

The NextGen exam is also being evaluated and monitored by the Supreme Court's Bar Licensure Task Force, which was created in November 2020 to evaluate and assess the efficacy of the Washington state bar licensure requirement for licensing lawyers, including consideration of potential alternatives.

New Diversity, Equity and Inclusion (DEI) Events & Trainings Feature on WSBA Website

Recently, we created a feature on the WSBA calendar that will allow people to find DEI events and trainings more easily. This calendar will display WSBA events and trainings, as well as events put on by partner and community organizations.

The calendar is located here. Click on the filter drop down arrow and scroll down to the bottom where it says "DEI Events and Trainings" as shown below:



If you have any questions, please email us at diversity@wsba.org. We hope that this can be a useful resource for our members and the public.

Statewide Juror Summons Demographic Survey Project

On June 30, 2023, the Final Report for the Washington State Juror Summons Demographic Survey 2023 was published. This study, undertaken by Professor Peter A. Collins, Ph.D., Associate Professor Brooke Miller Gialopsos, Ph.D., and MA Candidate Bailey Tanaka of Seattle University was funded by the Administrative Office of the Courts (AOC). The study finds that jurors of color, particularly Black and Native jurors, remained underrepresented in jury pools throughout the state, and face greater barriers to jury service. These include work-related and financial barriers, which disproportionately impact working parents and people of color. You can find the report on the AOC website.

Attachments

Program Review Summary and Update
FY23 Q3 Budget Reallocations
FY23 Q3 Budget Memo
Litigation Report
Media Report
Member Demographics Report

WASHINGTON STATE BAR ASSOCIATION

TO: WSBA Board of Governors

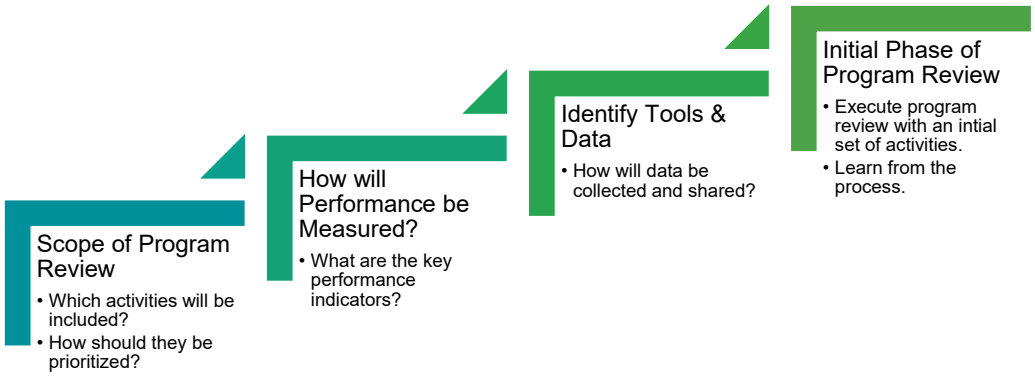
FROM: Executive Director Terra Nevitt

DATE: July 24, 2023

RE: WSBA Program Review Summary and Update

At the January 13-14, 2023, meeting, the Board of Governors identified establishing a process for WSBA program review as a priority for the FY23 fiscal year. The stated purpose of this priority is "To develop, implement, and institutionalize a process that will enable the BOG to understand and identify what programs the WSBA is reviewing, how effective the programs are at achieving the goals and mission, and whether or not anything needs to change."

As previously outlined, we are seeking to achieve this goal in four parts:



Part 1: Scope of Program Review

At the March Board of Governors meeting, I presented a proposed scope for program review, as well criteria for identifying which programs to prioritize for review.

The *scope of Program Review* includes:

- Programs for which the Board of Governors has autonomous discretion over the budget and the ability to sunset the program or activity.
- Programs for which the Board of Governors has clear authority to direct the goals and desired outcomes of the work.
- Programs that do not consist of a purely operational function or a function for which the Supreme Court retains authority for directing the goals or the outcomes of the work.

Applying these criteria to all of WSBA's programs and activities, the following would fall within the scope of this program review process.

50 Year Member Recognition	Diversity Equity and Inclusion Activities	Listening Tour and Other Member Engagement	Public Engagement
ABA Delegation	Diversity Equity and Inclusion Plan and Policy	Member Dispute Mediation[1]	Public Legal Education
APEX and Other Awards	Fee Dispute Arbitration[1]	Member Wellness	Public Service Recognition and Support
Bar News, SideBar and Other Member Communications	Free Legal Research Tool	Mentorship Activities	Rural Practice Programming
BOG Committees	Insurance Marketplace	Moderate Means Program	Sections
BOG Elections	Judicial Recommendation	New Member Support and Activities	Volunteer Engagement
BOG Onboarding and Training	Judiciary Support and Engagement	Practice Management Assistance	Washington State Bar Foundation
Continuing Legal Education	Law Student Engagement	Practice Management Discounts	WSBA Committees and Councils
Court Rule and Law Improvement	Legal Lunchbox and Other Free CLEs	Powerful Communities Project	
Deskbooks	Lending Library	Professionalism Activities	

Each year, WSBA would prioritize 2-10 programs and activities for review using the following criteria:

- Programs which have a significant budget impact.
- Programs that are the relevant to current organizational priorities and goals.
- Programs that have not been reviewed in the prior five years.

The number of programs that can be reviewed annually will depend on the complexity of and labor required for the process that we chose, the complexity of the program or activity being reviewed, and organizational capacity each year.

Key Performance Indicators

At the May Board of Governors meeting, I presented the balanced scorecard approach as a suggested framework for measuring the performance of WSBA programs and activities. This framework involves evaluating programs and activities using a variety of perspectives, which are drawn from the Strategic Goals adopted by the Board on April 16, 2021. In May, members of the Board and Leadership Team considered each perspective and suggested things that we might measure in order to evaluate the performance of a program.

[1] Authorized by GR 12.2 but not a current activity.

PERSPECTIVES	OBJECTIVES	MEASURES/KPIS
Member Focused	Provide resources for professional excellence	1. Number of members reached/served (unique and duplicated) 2. Number of members served compared to potential 3. Participant satisfaction 4. Participant outcomes 5. Participant demographics, including years of practice 6. Stakeholder perception of activity 7. Extent to which the activity is designed to, or actually, furthers professional excellence
Public Focused	Uphold honor, respect, and integrity among members Promote access to justice and promote public trust and confidence	1. Level of public engagement, if any 2. Public participant satisfaction, if any 3. Stakeholder perception of activity 4. Extent to which the activity is designed to, or actually, works to uphold honor, respect, and integrity among members
Equity Focused	Promote diversity, equity, and inclusion in the profession	1. Diversity of membership, volunteers, and program participants 2. Stakeholder perception of activity 3. Extent to which the activity is designed to or actually furthers the DEI plan and related goals
Financial	Manage the business of the bar prudently	1. Total cost 2. Net cost 3. Cost per member reached/served (unique and duplicated) 4. Staff time 5. Volunteer time, where applicable 6. Cost of any identifiable alternatives
Internally Focused	Foster a culture that demonstrates a commitment to staff and embodies WSBA's mission	1. Staff turnover rate compared to organizational rate 2. Staff satisfaction 3. Time to fill vacant roles 4. Open volunteer positions, where applicable 5. Volunteer interest, where applicable 6. Volunteer satisfaction

Next Steps

Between now and the end of the fiscal year, I will be working with the Executive Leadership Team to identify the data and tools that can be used to measure the success of WSBA activities as described above and to propose a process for conducting a pilot for program review early next year.

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors
Budget and Audit Committee

From: Terra Nevitt, Executive Director

Date: July 12, 2023

Subject: FY 2023 Budget Reallocations for Q3

Background

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

"The Executive Director approves and reports to the Board of Governors about certain unbudgeted expenses, including reallocations of budgeted expenditures where the intent is similar or varies slightly; unbudgeted expenditures that are fully offset by unbudgeted revenue or a reallocation of budgeted expenditures up to 5% of the approved operating budget to address operational, regulatory or programmatic needs; and necessary and prudent expenditures to implement WSBA's Disaster Recovery Plan or to maintain WSBA's operations. Per occurrence limit is $215,000.00. Prior to taking action the Executive Director must notify the President and after taking action must report the reallocation of funds to the Board. Reallocations may not affect the annual budget's bottom line."

President Clark was notified of the reallocations on May 24, June 1, and July 11.

For FY 2023, the WSBA's annual operating budget is $25,719,395 and the Executive Director's limit for reallocation is up to $1,285,696.75 (5%). The total amount of funds reallocated through June is $234,827 (0.91% of annual operating budget).

FY23 Budget Reallocations for Q3 (May & June, April reallocations previously reported)

Below are reallocations totaling $77,262 in budgeted expenses (0.3% of total budget).

1. *Technology upgrades to WSBA meeting and hearing rooms to allow for hybrid meetings*- Additional expense for the addition of control panels in each meeting room to allow users to join meetings quickly and easily from inside the room. The original scope assumed the use of a single universal control for all rooms housed outside of the rooms. The cost is estimated at $5,417 which will be reallocated from the Computer Canned Software available budget of $36,160.

2. *Consulting Services*- Unanticipated need for consulting services for software development in our Admissions software platform to allow processing and payment receipt of Pro Hac Vice applications (currently processed manually). The goal is to have this work completed and tested prior to the start of the 2024 licensing season (October/November). Total cost is estimated at $4,000 and funds will be reallocated from consulting services in the Finance cost center which has $7,000 available for reallocation.

3. *Board of Bar Examiners*- Unanticipated need for additional funding to send 2 exam graders to the National Conference of Bar Examiners (NCBE) grading workshop in-person this summer. This is the first time since Covid that the workshop is being offered in-person and the FY23 budget assumed it only be offered remotely. The total cost is estimated at $3,000 and funds will be reallocated from Consulting Services in the Finance cost center which has $3,000 available to be reallocated (after $4,000 designated for reallocation in item #2).

4. *Staff Training & Conferences*- Additional funds are needed in the Practice Management Assistance cost center to support an unanticipated staff training opportunity. The total amount of $250 will be reallocated from unused funds for the Member Wellness Council, which has a budget of $800.

5. *Surveys (Diversity cost center)*- The FY23 Budget includes $16,500 under Surveys in the Diversity cost center for remaining membership demographic study costs (work began in FY22). The budget was based on the estimated work to be completed between FY22 and FY23. Due to several unforeseen circumstances, work was delayed into FY23. The total cost is $28,500 that will be reallocated from two sources of unused funds: (1) $20,000 from Diversity Events and Projects expenses in the Diversity cost center, and (2) $8,500 from Outside Counsel expenses in the OGC Disciplinary Board cost center. Keep in mind that these funds were included in the FY22 budget but not spent by the end of the fiscal year, so costs are being carried over into FY23.

6. *Computer Hardware (Capital Expenditure)*- There is a need for replacement of existing hardware that supports WSBA's IT back-up data process. The identified solution would allow us to decommission 3 aged on-premises devices and replace with a single solution that would incorporate on-premises and cloud-based needs. The FY23 Capital Budget includes funds for Computer Canned Software that has funds available for reallocation (up to $74,243). Therefore, we will reallocate $15,000 from Computer Canned Software to support the cost of replacement identified as a critical need.

7. *Capital Labor for development of MCLE System*- There is a need for additional capital labor hours to support the development of the WSBA's MCLE software system which has been in progress for the majority of FY23 and is scheduled for completion of the first phase of the project in August 2023. The FY23 Capital Budget includes funds for Computer Custom Software that has funds available for reallocation (up to $59,243 after considering reallocations #1 and #6 above). Therefore, we will reallocate $21,095 from Computer Canned Software to support the cost of development to complete this phase of the MCLE software system project.

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors
Budget and Audit Committee

From: Tiffany Lynch, Director of Finance

Subject: FY 2023 Third Quarter Financial Update

Date: July 20, 2023

GENERAL FUND

The June 30, 2023 financials mark the end of the third quarter of fiscal year 2023. With 75% of the year complete, the General Fund is outperforming against budget resulting from higher revenue and lower expenses than budgeted. General Fund net income is $1,890,969 as of June 30, 2023. Below is a narrative which highlights major variances and budget categories for the quarter, and corresponding estimates for the remainder of the year.

REVENUE

Total revenue is favorable to budget at 80% ($1,141,107) which includes the following areas of note:

a. *Interest Income* is over budget for the year by $616,516 (2,446%). This revenue source has grown due to higher than anticipated interest rates on money market funds and investment of available cash in certificates of deposit (CD) and treasuries which was not originally incorporated in the budget. We expect to continue to earn revenue at similar interest rates in the last quarter of the year.
b. *Bar Exam Fees* are ahead of budget by $100,949 (7%) due to timing of the collection of fees. While we anticipate some remaining funds to be collected in July and August, it is expected that it will be at a lower rate than previous months.
c. *Job Target Advertising (Bar News)* revenue is under budget by $49,674 (25%) and is expected to remain under at year-end. Revenue is generated from job postings which are down 17% from last year and is consistent with a downward trend in legal job postings in the market generally.
d. *Recovery of Discipline Costs* continues to remain under budget at $33,897 (34%) as of June. Revenue collected is difficult to predict as the amount and timing of collections is dependent upon individual action largely outside the control of WSBA.
e. *Mandatory CLE* revenue is ahead of budget by $267,312 (24%). The amount of fees collected in the first half of the fiscal year tends to be higher than budget due to reporting deadlines, however we continue to earn consistent revenue for accreditation and late fees. We expect that revenue will exceed budget by approximately $200,000 by year-end.
f. *Licensing Fees* are under budget at 74%. The bulk of fees are collected in January and pro-rated on a monthly basis, and the budget assumes an even timing distribution of revenue between each month. As we progress further into the fiscal year, we will collect additional revenue from late fees (assessed after February 1st) and fees for newly admitted members. We expect overall

license fees to come in under budget by approximately $150,000 at year-end.

g. *Reimbursement from Sections* revenue is over budget by $64,523 (47%). This revenue is derived from the per-member charge that reimburses WSBA for the cost of administering Sections for the membership year (January-December). This is over budget due to timing of allocation of revenue caused by the difference between the membership year and WSBA's fiscal year (October-September). We expect revenue will come back in line with budget at the end of the fiscal year.

EXPENSES

Total expenses are under budget by 5% ($1,170,762), which includes the following areas of note:

a. *Direct Expenses* are under budget by 29% ($759,292). Direct program costs such as board/council/taskforce meetings, event expenses, supplies, staff travel, etc. vary depending on the timing of activities. There are some key areas where spending will pick up in the last quarter of the year, including: July bar exam, two Board of Governors meetings in eastern Washington, multiple trainings and conferences, and payments on contracts for Moderate Means Program and Washington Leadership Institute.

b. *Indirect Expenses* are under budget by 2% ($451,621).

   i. Salaries, Taxes, & Benefits had a combined savings of $136,050 with expenses at 74% of budget. The largest amount of savings continues to be attributed to unfilled positions for salaries, medical, and retirement contributions, as well as increased capital labor for WSBA software development projects. Areas trending above budget include temporary staffing salaries which are ahead of budget because temps are being used to support open positions during recruitment, employer taxes for FICA and WA State Family Medical (costs will likely continue to run over budget through the rest of the year due to underbudgeting), and unemployment insurance (resulting from higher-than-expected rate increase).

   ii. Other Indirect Expenses had a combined savings of $315,571. Timing of expenses for workplace benefits and move/downsizing will occur in the last quarter of the year, and we continue to have lower YTD for legal fees. We expect some areas to remain in under budget at year-end including depreciation, professional fees- audit, telephone & internet, and production maintenance and supplies.

CONTINUING LEGAL EDUCATION (CLE)

The CLE fund includes CLE Seminars, CLE Products, and Deskbook cost centers which collectively have budgeted a surplus of $217,235 for FY 2023. June 30, 2023 results reflect an actual surplus of $258,009. Revenue is under budget by 5% ($94,122) due to lower seminar registrations and deskbook sales. It is expected that both revenue sources will continue to run under budget by year end, however other revenue sources will remain on budget for product sales (currently the CLE summer sale is underway which will bring in additional sales) and deskbook royalties (there two new editions of deskbook titles that will be released and likely produce strong sales in the last quarter of the fiscal year). Expenses are under budget by 11% ($189,205), mostly due to timing of direct expenses that have not been incurred yet for seminars held later in the fiscal year and lower cost of sales for deskbooks that have not been sold.

CLIENT PROTECTION FUND (CPF)

The Client Protection Fund (CPF) budgeted a surplus of $45,788 for FY 2023. Actual results as of June 30, 2023 reflect a surplus of $670,730. Revenue from member assessments is collected as part of the attorney license renewal period (November-February) and is at budget for the year. Interest income was not budgeted and has earned $176,710 and will continue to earn interest through the rest of the fiscal year. Overall expenses are under budget by 43% ($296,453), mainly due to direct expenses for Gifts to Injured Clients which are paid out towards the end of the fiscal year.

SECTIONS FUND

The Sections Operations cost center represents the collective total of financial activity for all 29 sections. Sections budgeted a loss of ($254,951) for FY 2023. Actual results as of June 30, 2023 reflect a surplus of $77,474, mainly related to higher than anticipated section dues revenue and timing of programming and Section activities which are planned throughout the year at different times.

To: The President, President-elect, Immediate Past-President, and Board of Governors
From: Julie Shankland, General Counsel
Lisa Amatangel, Associate Director, OGC
Date: July 24, 2023
Re: Litigation Update – current through 07.24.23

No.	Name	Brief Description	Status
1.	*Langadinos v. WSBA, et al.,* No. 2:23-cv-00250-RSM (W.D. Wash.)	Alleges disability discrimination.	On 6/22/23, the WSBA filed a Motion to Dismiss. Plaintiff filed a response to WSBA's motion on 7/10/23. WSBA filed a reply in support of MTD on 7/14/23.
2.	*Schlecht v. WSBA,* No. 23-2-05082-7-KNG (King County Sup. Court)	Alleges improper handling of plaintiff's records requests.	On 4/24/23, the WSBA filed a Motion to Dismiss. A hearing on the Motion to Dismiss was held on 5/26/23 and the motion was granted with prejudice. On 6/26/23, Schlecht filed a Notice of Appeal to the Supreme Court. Schlecht filed a Statement of Grounds for Direct Review on 7/10/23.
3.	*Block v. WSBA, et al.*, No. 15-cv-02018-RSM (W.D. Wash.) ("*Block I*")	Alleges conspiracy among WSBA and others to deprive plaintiff of law license and retaliate for exercising 1st Amendment rights.	On 02/11/19, the Ninth Circuit affirmed dismissal of claims against WSBA and individual WSBA defendants; the Court also vacated the pre-filing order and remanded this issue to the District Court. On 12/09/19, the United States Supreme Court denied plaintiff's Petition of Writ of Certiorari. On 12/13/19, the District Court reimposed the vexatious litigant pre-filing order against Block; Block filed a notice of appeal regarding this order on 01/14/20 ("Block I – Appeal II"). Block filed an opening brief in Block I – Appeal II on 11/06/20; WSBA filed its answering brief on 01/07/21. Block's optional Reply Brief was due on 01/28/21. Block filed a reply brief on 04/26/21 along with a motion for extension. The Ninth Circuit set this matter for consideration without oral argument on 06/08/21. On 07/02/21 the Ninth Circuit affirmed the dismissal of Block II pursuant to the original vexatious litigant order.

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800-945-WSBA | 206-443-WSBA | questions@wsba.org | **www.wsba.org**

			On 09/10/20, Block moved to vacate the vexatious litigant order; WSBA opposed the motion and it was denied. In response to the district court's denial of Block's motion to vacate, on 10/01/20, Block filed a motion for an indicative ruling on whether the district court would vacate the vexatious litigant order if the appellate court remanded the case for that purpose. WSBA opposed the motion. Block filed a reply on 10/16/20. This motion was denied. On 09/09/21, Block filed a motion to vacate all decisions in this matter; WSBA filed an opposition on 09/20/21. This motion was denied on 09/28/21. Block appealed the order issued on 09/28/21. The Ninth Circuit opened a new appeal (9th Cir. No. 21-35922), "Block I – Appeal III", in which Block's opening brief was due 01/05/22. Block filed an untimely motion to extend the time to file her opening brief; WSBA opposed the motion on 02/07/22. Block filed an opening brief in Block I – Appeal III on 3/3/22. WSBA's answering brief was due 5/4/22. After two extensions, Block filed a reply brief on 6/27/22. On May 23, 2023, the Ninth Circuit rejected Block's appeal and affirmed the district court's findings. Update since last report: none.

WSBA Member* Licensing Counts 7/12/23 9:22:23 AM GMT-07:00

Member Type	In WA State	All
Attorney - Active	26,290	33,758
Attorney - Honorary	429	483
Attorney - Inactive	2,655	5,827
Attorney - Pro Bono	116	123
Judicial	639	671
LLLT - Active	80	80
LLLT - Inactive	6	7
LPO - Active	719	732
LPO - Inactive	173	191
	31,107	41,872

Misc Counts	
All License Types **	42,276
All WSBA Members	41,872
Members in Washington	31,107
Members in western Washington	26,980
Members in King County	17,282
Members in eastern Washington	3,881
Active Attorneys in western Washington	22,869
Active Attorneys in King County	15,095
Active Attorneys in eastern Washington	3,200
New/Young Lawyers	6,618
MCLE Reporting Group 1	11,503
MCLE Reporting Group 2	11,321
MCLE Reporting Group 3	11,442
Foreign Law Consultant	20
House Counsel	374
Indigent Representative	10

By District		
	All	Active
0	5,102	3,869
1	2,963	2,471
2	2,182	1,755
3	2,111	1,762
4	1,372	1,149
5	3,265	2,667
6	3,431	2,830
7N	4,964	4,260
7S	6,311	5,211
8	2,326	2,001
9	4,950	4,191
10	2,895	2,404
	41,872	34,570

By Section ***	All	Previous Year
Administrative Law Section	230	254
Animal Law Section	78	92
Antitrust, Consumer Protection and Unfair Business Practice	189	194
Business Law Section	1,178	1,237
Civil Rights Law Section	173	176
Construction Law Section	484	499
Corporate Counsel Section	1,029	1,089
Creditor Debtor Rights Section	446	459
Criminal Law Section	342	384
Dispute Resolution Section	283	321
Elder Law Section	596	601
Environmental and Land Use Law Section	757	769
Family Law Section	974	1,005
Health Law Section	369	395
Indian Law Section	327	326
Intellectual Property Section	816	860
International Practice Section	243	244
Juvenile Law Section	133	143
Labor and Employment Law Section	979	982
Legal Assistance to Military Personnel Section	75	81
Lesbian, Gay, Bisexual, Transgender (LGBT) Law Section	98	122
Liquor, Cannabis, and Psychedelics Law Section	82	71
Litigation Section	1,003	1,025
Low Bono Section	74	77
Real Property Probate and Trust Section	2,218	2,262
Senior Lawyers Section	206	213
Solo and Small Practice Section	854	883
Taxation Section	608	622
World Peace Through Law Section	123	136

*** Per WSBA Bylaws 'Members' include active attorney, emeritus pro-bono, honorary, inactive attorney, judicial, limited license legal technician (LLLT), and limited practice officer (LPO) license types.**

**** All license types include active attorney, emeritus pro-bono, foreign law consultant, honorary, house counsel, inactive attorney, indigent representative, judicial, LPO, and LLLT.**

***** The values in the All column are reset to zero at the beginning of the year (Jan 1). The Previous Year column is the total from the last day of the prior year (Dec 31). WSBA staff with complimentary membership are not included in the counts.**

By State and Province	
Alabama	26
Alaska	186
Alberta	9
Arizona	384
Arkansas	21
Armed Forces Americas	2
Armed Forces Europe, Middle East	21
Armed Forces Pacific	10
British Columbia	92
California	2,060
Colorado	295
Connecticut	45
Delaware	11
District of Columbia	363
Florida	288
Georgia	90
Guam	14
Hawaii	146
Idaho	511
Illinois	193
Indiana	48
Iowa	32
Kansas	32
Kentucky	47
Louisiana	44
Maine	16
Maryland	127
Massachusetts	95
Michigan	74
Minnesota	109
Mississippi	5
Missouri	80
Montana	170
Nebraska	16
Nevada	165
New Hampshire	16
New Jersey	59
New Mexico	76
New York	281
North Carolina	96
North Dakota	9
Northern Mariana Islands	6
Nova Scotia	2
Ohio	90
Oklahoma	50
Ontario	16
Oregon	2,754
Pennsylvania	80
Puerto Rico	6
Quebec	2
Rhode Island	19
South Carolina	32
South Dakota	11
Tennessee	66
Texas	454
Utah	194
Vermont	13
Virginia	270
Virgin Islands	2
Washington	31,107
West Virginia	7
Wisconsin	53
Wyoming	22

By WA County	
Adams	15
Asotin	24
Benton	398
Chelan	258
Clallam	159
Clark	999
Columbia	7
Cowlitz	132
Douglas	40
Ferry	8
Franklin	58
Garfield	3
Grant	122
Grays Harbor	115
Island	150
Jefferson	123
King	17,282
Kitsap	852
Kittitas	96
Klickitat	24
Lewis	112
Lincoln	13
Mason	92
Okanogan	89
Pacific	33
Pend Oreille	12
Pierce	2,463
San Juan	96
Skagit	294
Skamania	20
Snohomish	1,719
Spokane	2,040
Stevens	49
Thurston	1,723
Wahkiakum	10
Walla Walla	120
Whatcom	606
Whitman	67
Yakima	438

By Admit Yr	
1946	1
1947	2
1948	2
1949	1
1950	4
1951	12
1952	17
1953	13
1954	20
1955	9
1956	27
1957	20
1958	23
1959	27
1960	21
1961	20
1962	24
1963	26
1964	30
1965	44
1966	52
1967	49
1968	64
1969	77
1970	82
1971	87
1972	131
1973	209
1974	191
1975	238
1976	282
1977	297
1978	320
1979	351
1980	376
1981	401
1982	386
1983	434
1984	1,020
1985	504
1986	682
1987	669
1988	591
1989	642
1990	814
1991	783
1992	779
1993	881
1994	820
1995	781
1996	769
1997	869
1998	859
1999	883
2000	877
2001	877
2002	951
2003	1,011
2004	1,052
2005	1,079
2006	1,151
2007	1,226
2008	1,073
2009	949
2010	1,047
2011	1,034
2012	1,050
2013	1,195
2014	1,321
2015	1,550
2016	1,274
2017	1,351
2018	1,272
2019	1,326
2020	1,519
2021	1,392
2022	1,490
2023	571

WSBA Member* Demographics Report 7/12/23 9:23:27 AM GMT-07:00

By Years Licensed	
Under 6	8,312
6 to 10	6,477
11 to 15	5,176
16 to 20	5,124
21 to 25	4,218
26 to 30	3,625
31 to 35	2,923
36 to 40	2,343
41 and Over	3,673
Total:	**41,871**

By Age	All	Active
21 to 30	1,711	1,656
31 to 40	8,966	8,078
41 to 50	10,546	8,903
51 to 60	9,308	7,355
61 to 70	7,124	5,291
71 to 80	3,547	2,311
Over 80	670	164
Total:	**41,872**	**33,758**

By Ethnicity	
American Indian / Native American / Alaskan Native	219
Asian-Central Asian	27
Asian-East Asian	335
Asian-South Asian	98
Asian-Southeast Asian	107
Asian—unspecified	966
Black / African American / African Descent	668
Hispanic / Latinx	709
Middle Eastern Descent	39
Multi Racial / Bi Racial	1,147
Not Listed	241
Pacific Islander / Native Hawaiian	63
White / European Descent	22,087
Respondents	**26,706**
No Response	**15,166**
All Member Types	**41,872**

By Sexual Orientation	
Asexual	25
Gay, Lesbian, Bisexual, Pansexual, or Queer	770
Heterosexual	6,475
Not Listed	152
Selected multiple orientations	32
Two-spirit	3
Respondents	**7,457**
No Response	**34,415**
All Member Types	**41,872**

By Disability	
Yes	1,363
No	19,701
Respondents	**21,064**
No Response	**20,808**
All Member Types	**41,872**

By Gender	
Female	10,620
Gender Non-Confirmin	6
Genderqueer	6
Male	14,275
Man	1,358
Non-Binary	37
Not Listed	59
Selected Mult Gender	41
Transgender	1
Two-spirit	4
Woman	1,469
Respondents	**27,876**
No Response	**13,996**
All Member Types	**41,872**

Members in Firm Type	
Bank	39
Escrow Company	63
Government/ Public Secto	5,139
House Counsel	3,298
Non-profit	612
Title Company	126
Solo	4,978
Solo In Shared Office Or	1,127
2-5 Members in Firm	4,070
6-10 Members in Firm	1,610
11-20 Members in Firm	1,271
21-35 Members in Firm	752
36-50 Members In Firm	571
51-100 Members in Firm	601
100+ Members in Firm	1,843
Not Actively Practicing	2,471
Respondents	**28,571**
No Response	**13,301**
All Member Types	**41,872**

By Practice Area	
Administrative-regulator	2,315
Agricultural	233
Animal Law	104
Antitrust	316
Appellate	1,639
Aviation	188
Banking	434
Bankruptcy	796
Business-commercial	5,223
Cannabis	163
Civil Litigation	238
Civil Rights	1,101
Collections	461
Communications	202
Constitutional	656
Construction	1,341
Consumer	775
Contracts	4,331
Corporate	3,666
Criminal	3,538
Debtor-creditor	860
Disability	557
Dispute Resolution	1,244
Education	489
Elder	799
Employment	2,807
Entertainment	325
Environmental	1,267
Estate Planning-probate	3,146
Family	2,491
Foreclosure	428
Forfeiture	91
General	2,436
Government	2,921
Guardianships	769
Health	986
Housing	337
Human Rights	332
Immigration-naturaliza	1,000
Indian	566
Insurance	1,596
Intellectual Property	2,292
International	908
Judicial Officer	460
Juvenile	778
Labor	1,138
Landlord-tenant	1,155
Land Use	886
Legal Ethics	299
Legal Research-writing	880
Legislation	462
Lgbtq	115
Litigation	4,833
Lobbying	173
Malpractice	722
Maritime	306
Military	379
Municipal	909
Non-profit-tax Exempt	667
Not Actively Practicing	2,042
Oil-gas-energy	269
Patent-trademark-copyr	1,335
Personal Injury	3,112
Privacy And Data Securit	505
Real Property	2,665
Real Property-land Use	2,089
Securities	789
Sports	186
Subrogation	131
Tax	1,280
Torts	2,015
Traffic Offenses	543
Workers Compensation	677

By Languages Spoken	
Afrikaans	6
Akan /twi	6
Albanian	2
American Sign Language	23
Amharic	23
Arabic	50
Armenian	9
Bengali	12
Bosnian	15
Bulgarian	13
Burmese	3
Cambodian	6
Cantonese	107
Cebuano	8
Chamorro	5
Chaozhou/chiu Chow	1
Chin	1
Croatian	20
Czech	7
Danish	19
Dari	6
Dutch	23
Egyptian	2
Estonian	1
Farsi/persian	70
Finnish	8
French	668
French Creole	2
Fukienese	4
Ga/kwa	2
German	398
Gikuyu/kikuyu	1
Greek	34
Gujarati	17
Haitian Creole	3
Hebrew	39
Hindi	108
Hmong	1
Hungarian	17
Ibo	4
Icelandic	2
Ilocano	9
Indonesian	13
Italian	163
Japanese	216
Kannada/canares	4
Kapampangan	2
Khmer	3
Korean	253
Kurdish/kurmanji	1
Lao	5
Latvian	6
Lithuanian	6
Malay	5
Malayalam	8
Mandarin	425
Marathi	6
Mien	1
Mongolian	1
Navajo	1
Nepali	4
Norwegian	36
Not_listed	55
Oromo	4
Pashto	1
Persian	23
Polish	37
Portuguese	132
Portuguese Creole	1
Punjabi	71
Romanian	23
Russian	231
Samoan	7
Serbian	16
Serbo-croatian	12
Sign Language	20
Singhalese	2
Slovak	3
Spanish	1,870
Spanish Creole	2
Swahili	9
Swedish	52
Tagalog	74
Taishanese	5
Taiwanese	27
Tamil	10
Telugu	4
Thai	14
Tigrinya	5
Tongan	2
Turkish	18
Ukrainian	46
Urdu	47
Vietnamese	93
Yoruba	10
Yugoslavian	3

*** Includes active attorneys, emeritus pro-bono, honorary, inactive attorneys, judicial, limited license legal technician (LLLT), and limited practice officer (LPO).**

WASHINGTON STATE
BAR ASSOCIATION

MEMO

To: Board of Governors

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

Date: July 24, 2023

Re: **Summary of Media Contacts, June 3-July 24, 2023**

Date	Journalist and Media Outlet	Inquiry
June 23	Jonathan Ames, The Times (London)	Sought source to explain legal liability arising from OceanGate incident. Referred to Federal Bar Association of Western District of Washington Admiralty Committee.
June 27	Chart Riggall, Law360	Requested documents for a grievance case. Sent standard media response.
June 28	Thomas Barrabi, NY Post	Inquired about an attorney grievance. Sent standard media response.
June 29	Sarah Liebovitz, KUOW (NPR)	Sought interview from Gonzaga Law School to discuss SCOTUS affirmative action decision. Referred to Gonzaga.
July 12	Jake Goldstein-Street, Everett Herald	Inquired about an attorney grievance. Sent standard media response.
July 17	Allison Dunn, Law.com	Inquired about an attorney grievance. Sent standard media response.

News Releases

- Washington State Bar Association Presents Judge Michael Evans with Local Hero Award (June 23)
- Washington State Bar Association Presents Zachary Stoumbos with Local Hero Award (June 23)

WASHINGTON STATE
BAR ASSOCIATION

TO: Board of Governors

FROM: Terra Nevitt, Executive Director

Paris Eriksen, Volunteer Engagement Advisor

DATE: July 24, 2023

RE: WSBA Treasurer Nomination & Voting Process

ACTION: (1) Determine election process (if needed) and, (2) elect a current member of the WSBA Board of Governors to serve as the 2023-2024 Treasurer, for a one-year term starting at the conclusion of the Board meeting on September 8-9, 2023.

Nomination Process:

Current members of the Board of Governors have two options to indicate interest in being nominated for Treasurer, (1) submit a cover letter and resume in advance of the August meeting or (2) welcome nominations from the floor of the August meeting. As of today, Francis Adewale has submitted materials for consideration, which follow this memo. All current Governors will have the opportunity to self-nominate or nominate another member to serve as the 2023-2024 Treasurer, prior to the election, at the August meeting. After all nominees have been identified, the Board will have the opportunity to ask questions of the candidates and engage in discussion.

Proposed Voting Process:

After discussion and if necessary, Board members will be asked to indicate their choice through a written secret ballot. The voting process will continue if needed until a winner is identified by a simple majority. Note that the President does not vote for Treasurer (see 2022 memo from General Counsel attached). The Bylaws require an election "in the event there is more than one more nomination", therefore ff there is only a single nominee for the position of Treasurer, no vote will take place. The single nominee will be declared Treasurer for 2023-2024 year.

The Bylaws are silent on how votes are tallied for the Treasurer election. With the consent of the Board we suggest following the process used for President-elect election, which is that the votes are tallied by three persons identified by the President, one of whom is the Executive Director.

Relevant WSBA Bylaw:

D. ELECTIONS BY BOARD OF GOVERNORS

2. Treasurer

The Treasurer must be a current lawyer Governor and will be nominated and elected by the BOG at the second to the last regularly scheduled BOG meeting of the fiscal year. The Treasurer will be elected by simple majority of Governors voting. In the event there is more than one more nomination, the vote will be by secret written ballot.

Materials:

Governor Francis Adewale, letter of interest and biographical statement
Letter of Support for Governor Francis Adewale from Governor Jordan Couch
Letter of Support for Governor Francis Adewale from Governor Kevin Fay
Letter of Support for Governor Francis Adewale from Governor Nam D. Nguyen
Memo: Who Votes in BOG Elections 3.18.22

Friday, June 2, 2023

VIA EMAIL

Paris Eriksen
1325 4th Ave Ste 600
Seattle, WA 98101-2539
parise@wsba.org

RE: Letter of Interest to Serve as WSBA Treasurer

I am writing to indicate my interest in serving as Washington State Bar Association (WSBA) Treasurer. I was elected as the 5th District Governor in 2021 and currently serve as Treasurer. In that capacity, I have worked closely with the Executive Director, President, Officers, and all Board of Governors members to provide transparency in our budget and audit process. I helped review our current fiscal policy and organized the first WSBA BOG budget retreat. My passion for justice and the desire to continue to bring fiscal probity to our organization's finances compels me to declare my interest in serving as WSBA Treasurer.

I have served as treasurer for the last year and during that tenure, I have gained valuable experience in managing WSBA budget and associated audits while also ensuring that our budget processes are streamlined. This allows our members express their views and provide input in the formulation of our budget. This wealth of knowledge is what I will continue to bring to the position of Treasurer if reelected.

The position of Treasurer in an organization like the WSBA is more than a figurehead. The importance of the position of Treasurer to the wellbeing of our members and sustainability of the WSBA cannot be overemphasized. I have operated an open door policy and reached out to Governors who are not members of the Budget and Audit to provide input to the formulation of our budget.

Good treasurers need to know accounting. Accounting is about following the financial rules for an organization. Financial accounting standard rules for most nonprofit and quasi-regulatory agencies such as the WSBA are clearly set by Financial Accounting Standards Board (FASB). Financial statements must be transparent and easy to understand for the Board of Governors so that they are able to make informed decisions that align with WSBA Mission Statement and its long term goals. As Treasurer, I have used my column in Bar News to explain and obtain input on various issues that our members care about, such as Client Protection Fund, Audit process, Section Funds etc.

I have never missed a meeting of the Budget and Audit Committee. As chair, I have led the committee to provide fundamental input to our budget process and provide clarity to staff preparing the budget. If reelected, I hope to ensure that the principles which have greatly helped our organization's smooth operation are well established for future Boards.

Accountability in the current environment requires that organizations such as the WSBA have explicit policies in three areas: accountability and regulatory policies, financial and financial management policies, and data integrity policies. These are three principal areas I have devoted my attention to as your treasurer in the last one year. As Treasurer in the last year, I have used my over 20 years of experience and service in nonprofit board management to help restructure how the Board works with its long range strategic council

My outreach efforts to our sections indicate concerns about our fiscal policies, and I have worked hard to include their voices and concerns in all our fiscal policy reform. If reelected as treasurer, I intend to continue my periodic meetings with section chairs and treasurers to see how we can assist them with bookkeeping, accounting, and financial ratios, such as liquidity, asset management and long-term solvency.

Even though I was born in Nigeria, West Africa, I have lived most of my adult life in Eastern Washington where I contributed to expanding opportunities for all people in our region and our state in general. As a recipient of the City of *Spokane's Human Rights Award*, Spokane County Bar Association *Smithmoore P. Myers Professionalism Award*, and one of the attorneys that helped establish Spokane Community Court, I understand the responsibilities and challenges of running regional and statewide programs with many competing interests. I take my fiduciary duties seriously and work hard to ensure that those tasked with managing our organization's finances operate with utmost responsibility and transparency within the accounting rules. If reelected as Treasurer, I will continue to work hard to ensure transparency in our accounting standard reports and increase oversight of our budget implementation.

Thank you for considering my letter of interest. I hope you will vote for me as Treasurer.

Sincerely,

Francis Adewale

Enc: resume and cover letter

Francis Adewale Biography

Francis Adewale was elected to the Board of Governors of the Washington State Bar Association in 2021 and elected by the Board as treasurer in 2022. Francis is one of the attorneys that helped establish Spokane Community Court. Francis' commitment to community and movement lawyering is epitomized by his work on several community based board and activities in Eastern Washington. He has served as chair of Refugee Connections Spokane, co-chair of Spokane Homeless Coalition, Spokane County Regional Law & Justice Council's Racial Equity Disparity Committee, member/trustee of Spokane County Bar Association and the Volunteer Lawyers Program.
He is former chair of Washington State Access to Justice Board and a member of Washington State Supreme Court's Interpreters Commission. He is currently board member of Northwest Immigrant Rights Project (NWIRP). He has been a founding member of the Washington Statewide Reentry Council having been reappointed thrice by Governor Jay Inslee. In addition to serving on the Board of Directors of Spokane City Credit Union, Francis and his wife also own and run a small business in Spokane. He is current Board President of AHANA: Eastern Washington Multi-Ethnic Business Association. He is a current National Conference of Bar Presidents Diversity Scholar.

Francis is H. George Frederickson Honors Graduate of Eastern Washington University and adjunct faculty at Whitworth University as well as Gonzaga Law School. Francis was admitted to the Washington State Bar in June 2000 and has since practice as assistant public defender for the City of Spokane.

Francis is a Fellow of Washington State Bar Association Leadership Institute (WLI) and ATJ Equal Justice Leadership Academy. Francis is a former recipient of City of Spokane Human Rights Award, Washington Criminal Defense Lawyers' President Award and Spokane County Bar Association Smithmoore P. Myers Professionalism Award. Francis, along with other team members of Spokane Community Court are recipient of 2018 WSBA Apex Award. He is the 2021 recipient of the Washington Defenders Association's President Award.

WASHINGTON STATE
BAR ASSOCIATION

Board of Governors

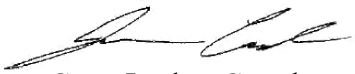
TO: Paris Eriksen, Volunteer Engagement Advisor
CC: Terra Nevitt, Executive Director & Dan Clark, WSBA President 2022-2023
FROM: Governor Jordan Couch
DATE: June 22, 2023
RE: Nomination of Governor Francis Adewale for WSBA Treasurer

There is no better person for the job of Treasurer than Francis Adewale. Being Treasurer requires not just an understanding of the Board of Governors and the Washington State Bar Association, but also of the various other Washington Supreme Court entities that connect with WSBA. Governor Adewale has experience across the spectrum of WBSA impacted organizations.

Just as important, Governor Adewale has the insight to be forward thinking and the courage to stand up for the future of our organization rather than simply cater to short sighted desire. For an organization like WSBA to continue we have to have that courage and foresight in our leadership.

Finally, I want to note that Governor Adewale has the patience, knowledge, and understanding to necessary to ensure that a large board like our is thoroughly informed on the financial issues such that smart decision can be discussed, debated, and made.

For all these reasons and more I am honored to nominate Francis Adewale to serve a second term as our Treasurer for the 2023-2024 year. I look forward to casting my vote for Governor Adewale and hope that you will, too.



Gov. Jordan Couch

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7414 Cleanwater Drve SE, Olympia, WA 98501
Phone/Email: 360-664-0870/nam.wsba@gmail.com

March 12, 2021

Paris Eriksen, Volunteer Engagement Advisor
1325 4th Ave, Suite 600
Seattle, WA 98101
parise@wsba.org

Re: Nomination for Washington State Bar Association (WSBA) Treasurer

I nominate Governor Francis Adewale for the position of WSBA Treasurer. As the current Treasurer, Governor Adewale has done an exemplary job of chairing the Budget and Audit Committee as well as making new innovations to the budget process that have increased transparency to, and input from, the Board of Governors.

One of the most consequential and controversial aspects of the WSBA Board of Governors is its role in overseeing the WSBA budget and fiscal policy. Over his present term as Treasurer, Governor Adewale has led this process and led it well. He has shown that he values discussion and transparency on the budgetary and financial issues before the Board; he wants each Governor to understand the budget and the fiscal impact of every decision before the Board. For the first time, Governor Adewale held a budget retreat to educate each Governor on WSBA finance and for each Governor to have a say on budgetary priorities.

Governor Adewale is also the perfect person to serve as Treasurer in the upcoming year - when the Board will make decisions and enact policies that will have significant budgetary consequences. Among these decisions are whether to relocate the WSBA headquarter and whether to fund other projects that promise to strengthen the WSBA, improve the legal profession, and increase access to justice. Governor Adewale has the experience, having served as Treasurer, to guide the Board on the fiscal impact of each decision. He has the skills, the demeanor, and the commitment to openness and robust debate to facilitate discussions on WSBA finance, and, most important, discussions on the organization's financial priorities.

For these reason, I affirm my nomination of Governor Francis Adewale for WSBA Treasurer for the 2023-2024 year.

Sincerely,

/s/ Nam Nguyen
WSBA Governor, District 10

WASHINGTON STATE
BAR ASSOCIATION

To: WSBA President Hon. Brian Tollefson (ret.), Officers, Board of Governors, and Executive Director Terra Nevitt

From: Julie Shankland, General Counsel

Date: March 18, 2022

Re: **Who votes in BOG elections**

The purpose of this memo is to explain whether the WSBA President votes in elections by the Board of Governors.

Questions and Short Answers

1. Does the President, as a member of the Board, participate in Board elections conducted by ballot?
    a. Short Answer: The President casts a ballot for President-Elect, but not for Treasurer.
2. Does the President vote to break a tie in a Board election?
    a. Short Answer: No.

Analysis

The President Votes If the President's Vote Will Affect the Result

The President is a member of the Board of Governors.[1] The Board elects the President-Elect of the Bar.[2] The President may vote only if the President's vote will affect the result.[3]

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[1] **RCW 2.48.030**
There is hereby constituted a board of governors of the state bar which shall consist of not more than fifteen members, to include: The president of the state bar elected as provided by the bylaws of the association . . ..

WSBA Bylaws Article IV.A.1
The BOG will consist of (a) the President; (b) one Governor elected from each Congressional District, except in the Seventh Congressional District where members will be elected from separate geographic regions designated as North and South, and identified by postal zip codes as established by the Bar in accordance with these Bylaws and BOG policy; and (c) three Governors elected at-large pursuant to these Bylaws.

[2] **WSBA Bylaws Article IV.A.2.a**
The BOG elects the President-elect of the Bar.

[3] **WSBA Bylaws Article IV.B.1**
The President is the chief spokesperson of the Bar, and presides at all meetings of the BOG. The President has the authority to: set the agenda however that authority is secondary to the authority of the Board of Governors at any Board meeting to take action on any issue raised by a duly seconded motion; take action to execute the policies established by the BOG; assign Governors as liaisons to Bar sections, committees, or task forces, specialty bar associations, and other law related organizations; and to appoint task forces, BOG committees, or other ad hoc entities to carry out policies established by the BOG. The President also performs any other duties typically performed by an organization's President. The President may vote only if the President's vote will affect

Robert's Rules of Order states that "the vote will affect the result" means: (1) when there is a tie on a vote, not by ballot, and requiring a majority, the President may vote in the affirmative to cause the motion to prevail; (2) If there is one more vote in the affirmative than in the negative, the President can create a tie by voting in the negative to cause the motion to fail; if a two-thirds vote is required, he or she may vote either to cause, or block attainment of the necessary two thirds. RONR (12th ed.) 44:12-13. (Emphasis added)

The "not by ballot" language signifies those elections are not treated the same as motion votes and, therefore, the WSBA Bylaw language limiting the President's vote does not limit the President from casting a secret ballot in an election. *Robert's Rules* explicitly states that presiding officers vote in the case of a ballot.[4] Because the President votes in an election, then it makes sense that the President would not cast a second ballot to break a tie in an election.

Treating votes and ballots differently makes logical sense. The President is required to maintain impartiality during Board debates and discussions. The President raises points and makes suggestions to clarify or to address misunderstandings during the meeting but must refrain from partisan statements or actions.[5] This explains the rules prohibiting the President from engaging in debate or generally voting on motions. However, this same need for impartiality does not exist in elections conducted by secret ballot.[6] So, interpreting the presidential voting limitation in the WSBA Bylaws to apply to votes, but not secret ballots is logical and consistent with the WSBA Bylaw language and is supported by *Robert's Rules*.

The President Does Not Vote for Treasurer Because the Bylaws Limit That Election to Governors Only

Article VI.D of the WSBA Bylaws contain a general process for all Board elections, and in addition, separate sections specifically addressing President-Elect and Treasurer elections. The Bylaw general provisions and the specific section for President-Elect are consistent and are also consistent with Roberts Rules. The specific provision for the Treasurer election appears to limit ballots to Governors. Typically, specific rules are given more weight in the event of a conflict.[7]

Bylaw Procedures for Elections Held by the BOG Under the WSBA Bylaws (Article VI.D.3)

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the result. The President must present a report to the membership covering the principal activities of the Bar during the President's tenure.

[4] Robert's Rules of Order also explain that "[t]he presiding officer, if a member of the assembly, can always vote in the case of a ballot at the time other members do. Should he fail to vote before the polls are closed, he cannot then do so without the permission of the assembly." RONR (12th ed.) 45:28

[5] RONR (12th Ed.) 43:29-34

[6] "If the presiding officer is a member of the assembly, or voting body, he has the same voting right as any other member. Except in a small board or a committee, however – unless the vote is secret (that is unless it is by ballot; -- the chair protects his impartial position by exercising his voting right only when his vote would affect the outcome. . .." (RONR (12th Ed.) 4:56

[7] Roberts Rules of Order (56:68) has a nice list of principles for bylaw interpretation, including: (1) Clear, unambiguous bylaw language cannot be changed by interpretation; and ambiguous bylaws should be interpreted in harmony with other bylaws if possible; (2) bylaw provisions susceptible of two meanings should not be interpreted to render other bylaws absurd; (3) general statements always have less authority than specific statements; (4) if bylaws authorize certain things specifically, other things of the same class are thereby prohibited; (5) and (6) provisions granting privileges provide rights to any included parts of the privilege, but greater privileges are prohibited; (7) imposition of a definite penalty for an action prohibits the increase or reduction of the penalty;

Elections of President and President-elect elections, and any other elections held by the BOG under these Bylaws, are conducted as follows:

a. Notice of the position will be advertised in the Bar's official publication and on the Bar's website no less than 30 days before the filing deadline and must include the closing date and time for filing candidate applications.

b. Following expiration of the closing date and time identified, all candidate names will be posted publicly.

c. The BOG may appoint a committee to recommend candidates to the BOG from all who have submitted their applications for a position in a timely manner.

d. All recommended candidates, or others as determined at the discretion of the BOG, will be interviewed in public session of the BOG's meeting. Candidates who are competing for the same position must not be present for each other's interviews.

e. Discussion of the candidates will be in public session, but candidates will be asked by the President not to be present.

f. Election of candidates will be conducted by secret written ballot.

g. If no candidate for a given position receives a majority of the votes cast, the two candidates receiving the highest number of votes will be voted on in a run-off election. In the event of a tie for the second highest vote total, all candidates who are tied will participate in the run-off election along with the candidate who received the most votes. The candidate with the most votes in the run-off will be deemed the winner.

h. Ballots will be tallied by three persons designated by the President, one of whom will be the Executive Director.

i. Proxy votes are not allowed; however, a Governor who participated in the interview and discussion process by electronic means may cast a vote telephonically via a confidential phone call with the Executive Director and the other persons designated by the President to count the ballots.

j. The elected candidate will be announced publicly following the vote. However, the vote count will not be announced and all ballots will be immediately sealed to both the BOG and the public and remain in the custody of the Executive Director for 90 days, when they will be destroyed.

WSBA Bylaw Specific to President-Elect Process VI.D.1

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

(Provisions relating to Eastern Washington omitted)

WSBA Bylaws Specific to the Treasurer Election Process (Article VI.D.2)

> The Treasurer must be a current lawyer Governor and will be nominated and elected by the BOG at the second to the last regularly scheduled BOG meeting of the fiscal year. The Treasurer will be elected by simple majority of Governors voting. In the event there is more than one nomination, the vote will be by secret written ballot.

The general elections provisions and the specific President-Elect Board voting procedures allow all Board members to cast secret ballots. Consequently, the President casts a ballot in the President-Elect election. The specific provision relating to the Treasurer election limits voting to Governors. Consequently, the President does not cast a ballot in the Treasurer election. Although the intent is not clear here, if there is only one candidate, the election is not by secret ballot. Consequently, the rule allowing the President to participate in secret ballot elections may not apply. Additionally, the Treasurer is required to be a Governor, while the President is not. It is possible that the election procedures are intentionally different, allowing the Governors to elect the Treasurer.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Todd Alberstone, Chair, MCLE Board

Bobby Henry, Associate Director for Regulatory Services

DATE: July 24, 2023

RE: MCLE Board's Suggested Amendments to APR 11

ACTION: The MCLE Board asks the Board of Governors to support its suggested amendments to APR 11 which would create and require one MCLE credit each reporting period in the subject matters of mental health and technology security.

EXECUTIVE SUMMARY

The Mandatory Continuing Legal Education (MCLE) Board is recommending amendments to rule 11 of the Admission and Practice Rules (APR). The MCLE Board's suggested amendments to APR 11 would:

- require legal professionals to earn one credit per reporting period in the subject of mental health;
- require legal professionals to earn one credit per reporting period in the subject of technology security;
- separate the already required credit in the subject of "equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law" from ethics and professional responsibility;
- reduce the number of required ethics and professional responsibility credits from six to five;
- allow for additional credits earned beyond the required amount for any given reporting period in the subjects of mental health, technology security, and "equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law" to carry over as "Other" credits.

The suggested amendments do NOT increase the total number of credits required for a reporting period. Nor do they dilute the ethics and professional responsibility ("ethics") or law and legal procedure requirements.

The suggested amendments reduce the ethics requirement to five credits, because the one credit requirement for "equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law" ("equity") would become its own category as opposed to a subcategory of ethics as it currently is. Creating a separate equity category will make it easier for members and staff to track compliance with the equity requirement.

The suggested amendments will not place a financial burden on licensed legal professionals. In 2019, the WSBA Board of Governors passed a motion directing WSBA CLE to offer free CLEs in the topics of mental health, technology security, and equity. The WSBA Board of Governors directed that the CLEs be offered in-person and on-demand for free, addressing the concern that this requirement would pose barriers to access or a financial burden for licensed legal professionals. In addition, several CLE sponsors regularly provide courses on these topics.

These suggested amendments would ensure lawyers, LLLTs, and LPOs focus on mental health and technology security topics (in addition to equity topics) at least once every three years. These are serious topics that can greatly impact a licensed legal professional's competency to practice law and, if ignored, could result in serious consequences. The proposed requirements, therefore, are directed toward the protection of clients and the public,

improving legal professional competency and integrity, and, ultimately, improving the legal community as a whole. In addition, having separate categories will make it easy for members to keep track of their requirements and which ones have been met.

PROCESS

In the Fall of 2022, the MCLE Board appointed a committee to study and make recommendations regarding any subject areas that should be required learning for all legal professionals. Following months of meetings, discussion, and research, the committee recommended two subject areas—mental health ethics and technology security ethics. Notably, the committee recommended that the subject areas be focused on ethical considerations related to the two subjects. In the Spring of 2023, the MCLE Board sought public comment on its proposal. Nearly 1,000 members responded to the survey with approximately 670 comments. Approximately 2/3 of members responding to the survey were opposed to the amendments and 1/3 were in support. Amongst the many reasons given for opposing the amendments were three in particular that the MCLE Board addressed. One, it would be too difficult to find presenters qualified to talk about the proposed subject matters and the related ethical considerations; two, it would be difficult for member to find ethics CLEs specifically on the two proposed subjects noting that ethics credits are already the most difficult to complete; and three, that it would be complicated and difficult to track compliance for the members. In light of these comments, at its June 16, 2023 meeting, the MCLE Board decided to remove the ethics component for both proposed subjects. In addition, the proposal creates separate credit categories for the subjects to make it easier for members to track their compliance. The MCLE Board, at a special meeting on June 14, 2023, approved the final language for the amendments and decided to seek support from the Board of Governors for the suggested amendments.

BACKGROUND

Equity Credit Category

The suggested amendments remove the subject of equity from the ethics and professional responsibility category and instead creates equity as its own credit category. This change does not affect the current requirement for legal professionals to earn one equity credit per reporting period. This is the reason for reducing the ethics credit requirement to five credits. Additionally, the suggested amendments clarify that the equity requirement needs to be met each reporting period and cannot be satisfied with carryover credit. Additional equity credits within one reporting period may carry over as “other” credits. Finally, as discussed above, creating a separate equity category will make it easier for members and staff to track compliance with the equity requirement.

Technology Security Credit

The suggested amendments include a new requirement for all licensed legal professionals to complete one credit each reporting period in technology security for the protection of electronic data and communication.

Legal professionals have an ethical and common law duty to take competent and reasonable measures to safeguard client information. They also have contractual and regulatory duties to protect confidential information. Rules 1.1, 1.3, and 1.4 of the Rules of Professional Conduct (RPC) address lawyers’ core ethical duties of competence, diligence, and communication with their clients. Possessing technological knowledge to safeguard client information as a fundamental requirement is explained in comment eight to RPC 1.1 which states that in order for legal professionals to, “[m]aintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practices, including the benefits and ***risks associated with relevant technology***, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is

subject." (Emphasis added.) With the advent of the global pandemic and an increasing number of legal professionals practicing "virtually," it is imperative that lawyers, and all legal professionals, stay cognizant of their ethical responsibilities.[1]

A Technology Security Credit Should be Mandatory Because Lack of Knowledge Can Result in Significant Consequences to Legal Professionals and Their Clients.

With each passing year, cybercrimes become more rampant and cyber insecurity results in increasingly costly and catastrophic events. "The rate of global weekly cyberattacks rose by 7% in the first financial quarter of 2023 compared with the same period in 2022" with an average 1,248 attacks per week and one of out of every 40 of those targeting a law firm or insurance provider.[2] "More than a quarter of law firms in a 2022 American Bar Association survey said they had experienced a data breach, up 2% from the previous year."[3] Electronic security breaches today are now so prevalent, that the question is not if, but when, it will happen. The Federal Bureau of Investigation Internet Crime Compliant Center ("IC3") received 847,376 complaints relating to extortion, identity theft, and personal data breaches representing potential losses exceeding $6.9 billion in 2021.[4] The IC3 receives an average of over 2,300 cybercrime complaints each day, with over 6.5 million complaints since the IC3's inception in 2000. [5] Washington state is ranked as the 9th highest state where internet crime victims reside.[6] Washington state victims reported losing $157,454,331 in 2021 as a result of internet crimes.[7]

In 2021, the IC3 received 19,954 compromised business email complaints resulting in adjusted losses at nearly $2.4 billion.[8] The cybercrimes involved sophisticated scams targeting businesses, including law firms, and individuals, such as law firm clients, performing monetary transfers. Criminals will hack emails and spoof business representatives' credentials to initiate fraudulent wire transfers.

Law firms are being specifically targeted. Such targeted attacks have become so frequent that the State Bar of Texas maintains an updated list on their blog notifying attorneys of recent scams.[9]

Additionally, back in October of 2018 the American Bar Association warned,

> Data breaches and cyber threats involving or targeting lawyers and law firms are a major professional responsibility and liability threat facing the legal profession. As custodians of highly sensitive information, law firms are inviting targets for hackers. In one highly publicized incident, hackers infiltrated the computer networks at some of the country's most well-known law firms, likely looking for confidential information to exploit through insider trading schemes.[10]

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[1] ABA Comm. on Ethics & Prof'l Responsibility, Formal Op. 498 (2021) (issuing cautionary ethics guidance on virtual law practices), https://www.americanbar.org/content/dam/aba/administrative/professional_responsibility/aba-formal-opinion-498.pdf

[2] Bloomberg Law, *Law Firm Cyberattacks Grow, Putting Operations in Legal Peril*, (2023), https://news.bloomberglaw.com/business-and-practice/law-firm-cyberattacks-grow-putting-operations-in-legal-peril?source=newsletter&item=body-link&region=text-section

[3] *Id.*

[4] Internet Crime Complaint Center, *2021 Internet Crime Report,* at 3 (2022), https://www.ic3.gov/Media/PDF/AnnualReport/2021_IC3Report.pdf.

[5] *Id.* at 18 n.16.

[6] *Id.* at 26.

[7] *Id.* at 27.

[8] *Id.* at 3.

[9] See Joanna Herzik, *Scams Continue to Target Texas Attorneys*, State Bar of Texas Blog (June 28, 2022), https://blog.texasbar.com/2022/12/articles/law-firms-and-legal-departments/scams-continue-to-target-texas-attorneys/.

[10] ABA Comm. on Ethics & Prof'l Responsibility, Formal Op. 483 (2018) (discussing lawyers' obligations after an electronic data breach or cyberattack), https://www.americanbar.org/content/dam/aba/images/news/formal_op_483.pdf.

The IC3 report details a complaint filed by a victim law office in June 2021 regarding a wire transfer of more than $198,000 to a fraudulent U.S. domestic account.[11] However, other law firms have reported bigger breaches with higher stakes at risk. In May of 2020, law firm hackers behind a ransomware attack on a New York celebrity law firm threatened to publish compromising information on former U.S. President Donald Trump if they did not receive their $42 million demand.[12] As proof, the hackers gained access to sensitive client information and published legal contracts related to the law firm's client, Madonna.[13] The hackers also released 2.4 GB of legal data related to client Lady Gaga.[14]

One in four law firms that participated in the ABA's 2021 Legal Technology Survey reported their firms experienced a data breach at some time.[15] A breach includes incidents like a lost/stolen computer or smartphone, hacker, break-in, or website exploit.[16] The actual number of victim firms could be higher as the firm may have experienced a security breach and never detected it. [17] The survey revealed that only 53% of law firms have a policy to manage the retention of information/data held by the firm, and only 36% of respondents have an incident response plan. [18]

Law firms are not the only legal targets. In May of 2020, a ransomware attack hit Texas courts and took down the courts' websites and case management systems for the state's appellate and high courts.[19] While there is no evidence that hackers accessed sensitive or personnel information, the hack left Texas' top civil and criminal courts without a working case management system or internet in their offices which forced staff to put out rulings over Twitter.[20]

Cybercriminals attacked our own Washington State Bar Association ("WSBA") website, malicious code was introduced to the website targeting credit card numbers entered into the website.[21] The myWSBA.org portal was taken offline in mid-November 2020, causing a disruption for members who wanted to log into their Fastcase and Casemaker accounts, purchase a Continuing Legal Education ("CLE") product, pay their license fee, and report Mandatory Continuing Legal Education credits.[22] As a precaution, the WSBA asked members who purchased a CLE product or paid their license fee at myWSBA.org during the previous year to monitor their credit card for potential fraudulent activity.[23]

The fact is, anyone with a computer connected to the Internet is susceptible to a cyberattack from computer hackers who use phishing scams, spam email, instant messages and bogus websites to deliver dangerous malware to the computer.[24] Once the malware program is installed on the computer, it may quietly transmit the user's private and

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[11] Internet Crime Complaint Center, *supra* note 2 at 11.

[12] Alex Scroxton, *Law Firm Hackers Threaten to Release Dirt on Trump*, ComputerWeekly.com (May 15, 2020, 10:19 AM), https://www.computerweekly.com/news/252483193/Law-firm-hackers-threaten-to-release-dirt-on-Trump.

[13] *Id.*

[14] *Id.*

[15] David G. Ries, *2021 Cybersecurity*, American Bar Association, https://www.americanbar.org/groups/law_practice/publications/techreport/2021/cybersecurity/ (last visited Dec. 4, 2022).

[16] *Id.*

[17] *Id.*

[18] *Id.*

[19] Jake Bleiberg, *Texas High Courts Hit By Ransomware Attack, Refuse to Pay*, APNEWS.com (May 12, 2020), https://apnews.com/article/hacking-tx-state-wire-technology-us-news-courts-474453285863aebab0a2fe239f493548.

[20] *Id.*

[21] E-mail from Terra Nevitt, Interim Executive Director, Wash. St. B. Ass'n, to WSBA Members (Nov. 13, 2020, 13:32 PST) (email available for records request).

[22] *Id.*

[23] *Id.*

[24] *The Dangers of Hacking and What a Hacker Can Do to Your Computer*, Webroot, https://www.webroot.com/us/en/resources/tips-articles/computer-security-threats-hackers (last visited Nov. 30, 2022).

financial information without their knowledge.[25] During the period of March 2021 to February 2022, 153 million new malware programs, including ransomware programs, were discovered.[26] This is a 5% increase from the previous year.[27]

Unfortunately, the learning curve is steep for users who find their computers infected.[28] [29] Continuing education in this field is necessary given the pace of technology development. Cyberattacks that will occur in a few years' time are not conceivable today.

A Technology Security Credit Should be Mandatory Because Lack of Knowledge Can Result in Significant Professional Dilemmas.

The following are only a few examples of technology scenarios that lead to professional pitfalls for legal professionals. CLEs on these topics can give members critical guidance that prevent negative outcomes for legal professionals and their clients.

After A Cyber Breach

Do firms have an ethical duty to notify their clients if a breach occurs? If so, there is a significant ethical issue not being addressed by lawyers given only 24% of the law firms nationwide that reported a breach in the ABA 2021 Legal Technology Survey notified their clients of the data breach.[30]

Public Wi-fi

It has become commonplace for lawyers to connect to public wi-fi when working in coffee shops or hotels.[31] However, by doing so, the lawyer can expose confidential and privileged client information because the "packets" or pieces of information they send or receive from their devices can be intercepted and decoded.[32] Additionally, lawyers may be tricked into logging on to a fake wi-fi network set up by cyber criminals to look like the legitimate public wi-fi network.[33] And unknowingly, offer up their clients' information to criminals on a platter.

Chatbots

Law firms are increasingly using Artificial Intelligence such as "chatbots" to deliver legal services and communicate with clients about their legal needs.[34] As such, do legal professionals have an ethical duty to train and supervise bots?[35] Can a legal professional or law firm be disciplined for the conduct of a chatbot? Chatbots have access to a person's personally identifiable information and other sensitive financial and medical data. Thus, are law firms in the United States that service international corporate clients subject to the requirements of the General Data Protection Regulation enacted in the European Union?

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[25] *Id.*

[26] Andra Zaharia, *300+ Terrifying Cybercrime and Cybersecurity Statistics (2023 Edition),* Comparitech (last updated Feb. 8, 2023). https://www.comparitech.com/vpn/cybersecurity-cyber-crime-statistics-facts-trends/.

[27] *Id.*

[28] *Id.*

[29] Webroot BrightCloud, *2021 Threat Report Mid-Year Addendum*, 2021, at 8.

[30] Ries, *supra*.

[31] Alison Austin, *Public Wi-fi: Lawyers Beware of Coffeehouse Practice*, American Bar Association (May 20, 2017), https://www.americanbar.org/groups/litigation/committees/trial-practice/practice/2017/beware-of-public-wifi/.

[32] *Id.*

[33] *What Is An Evil Twin Attack?*, Panda Security (Dec. 13, 2021), https://www.pandasecurity.com/en/mediacenter/security/what-is-an-evil-twin-attack/.

[34] Lisa Dimyadi, *Chatbots for Lawyers*, Clio, https://www.clio.com/blog/chatbots-for-lawyers/ (last visited Dec. 4. 2022).

[35] See e.g., Wash. Rules of Prof'l Conduct R. 5.1, 5.3 (2022).

Texting

Legal professionals use text messages to contact prospective clients.[36] Legal professionals also use texting to communicate with existing clients.[37] The use of text messages raises concerns whether and how confidentiality can be maintained in these communications and what steps a legal professional should take to ensure client information is protected. At a minimum, is the legal professional aware that others may have access to the client's mobile device? Additionally, text messages are not kept by the cellular provider indefinitely for future reference. Therefore, do legal professionals need to transfer and backup text messages from their mobile phones to their computers?

Use of Unencrypted Email

The use of unencrypted email to communicate with clients is generally accepted.[38] However, the American Bar Association warns,

> . . . cyber-threats and the proliferation of electronic communications devices have changed the landscape and it is not always reasonable to rely on the use of unencrypted email. For example, electronic communication through certain mobile applications or on message boards or via unsecured networks may lack the basic expectation of privacy afforded to email communications. Therefore, legal professionals must, on a case-by-case basis, constantly analyze how they communicate electronically about client matters, applying the Comment [18] factors to determine what effort is reasonable.[39]

A Technology Security Credit Should be Mandatory to Ensure Members Are Fulfilling Their Responsibilities of Competence and Diligence.

Despite the duty to keep abreast of the risks associated with relevant technology and that legal professionals increasingly use technology in their practice, most legal professionals lack training and experience in technology security to recognize and prevent a cyber-attack. These days, dangerous emails look like legitimate communications from your bank, Amazon, shipping carrier, or even your friend. With phishing, vishing, smishing, pharming, and spoofing tactics continually evolving and becoming more sophisticated and harder to detect, legal professionals not keeping up with the trends are at serious risk of jeopardizing client information and funds. The following statistics are troubling:

- More than 70% of phishing emails, socially engineered fraudulent messages designed to trick a person into revealing sensitive information or deploy malicious software, are opened by their targets.[40]
- More than 59.4 million Americans fell victim to voice phishing, also known as "vishing" in 2021.[41]

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[36] *Text Message Marketing for Lawyers*, CosmoLex, https://www.cosmolex.com/text-message-marketing-for-lawyers-the-next-big-thing/ (last visited Dec. 4, 2022).

[37] Mark C. Palmer, *Ethical Considerations for Lawyers When Texting Clients*, 2Civility (Jan. 6, 2022), https://www.2civility.org/ethical-considerations-for-lawyers-when-texting-clients/

[38] ABA Comm. on Ethics & Prof'l Responsibility, Formal Op. 477R (2017) (discussing securing communication of protected client information), https://www.americanbar.org/content/dam/aba/administrative/professional_responsibility/aba_formal_opinion_477.pdf .

[39] *Id.* (referring to Model Rules of Prof'l Conduct R. 1.6 cmt. 18 (2016).

[40] Nikolina Cveticanin, *Phishing Statistics & How To Avoid Taking the Bait*, DataProt (Nov. 16, 2022), https://dataprot.net/statistics/phishing-statistics/.

[41] Trevor Cooke, *Vishing Statistics 2022: Costs of Voice Phishing Attacks*, EarthWeb (Nov. 12, 2022), https://earthweb.com/vishing-statistics.

- Less than 35% of the United States population can correctly define smishing, phishing scams operating through text or short message service messages.[42]
- Millions in the US, Europe, and the Asia-Pacific region fell victim to a sophisticated pharming scam where the attackers directed bank customers to a fake website which downloaded malware to collect banking credentials before being redirected to their bank's real website.[43]
- During the first half of 2021, 62.6% of all identity deception-based attacks, or "spoofing" attacks, leveraged display name deception that impersonated a trusted individual or brand.[44]

Keeping clients' information safe is no longer just about keeping hard paper copies secure. The rise of technology in the practice of law creates several risks and raises several ethical questions. The monetary and ethical risks of failing to keep up with the benefits and risks associated with technology are significant and therefore mandating continuing legal education in this area is necessary.

Other Jurisdictions with Mandatory Technology Related Credits

By adding a required credit in technology security, Washington will join other states that recognize the necessity and value of this type of education to the legal profession. In 2023, Florida, New York, North Carolina and the U.S. Virgin Islands require or will require credits related to technology including topics related to cybersecurity.

Mental Health Credit

A Mental Health Credit Requirement Should be Mandatory Because of the Prevalence of Mental Health Issues Among Legal Professionals

The suggested amendments include a new requirement for all licensed legal professionals to complete one credit each reporting period in mental health.

Several recent studies concluded: Attorneys are prone to mental health issues, including substance abuse and addiction, depression, anxiety, and stress, more so than the general population. A nationwide study published in the Journal of Addiction Medicine in 2016 (the "ABA Study")[45], supported by the American Bar Association, studying licensed attorneys currently employed in the legal profession, who voluntarily completed surveys sent by their respective bar associations. The study found:

- 20.6% of respondents screened positive for hazardous, harmful, and potentially alcohol-dependent drinking, as compared with 6.4% of the general US population;
- 28% experienced symptoms of depression;
- 19% experienced symptoms of anxiety;
- 23% experienced symptoms of stress.

The study concluded, "attorneys experience problematic drinking that is hazardous, harmful, or otherwise consistent with alcohol use disorders at a higher rate than other professional populations." Attorneys under 30 years old were found to be at the higher level of 32%. Further, the study found that the data underscore the need for resources

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[42] Ben Martens, *11 Facts + Stats on Smishing (SMS Phishing) in 2022*, https://www.safetydetectives.com/blog/what-is-smishing-sms-phishing-facts/ (last visited Dec. 4, 2022).

[43] *What Is Pharming and How To Protect Against It,* Avast.com, https://www.avast.com/c-pharming (last visited Dec. 4, 2022).

[44] Zaharia, *supra*.

[45] Patrick R. Krill, Ryan Johnson & Linda Albert, *The Prevalence of Substance Use and Other Mental Health Concerns Among American Attorneys*, Journal of Addiction Medicine, pp. 46-52, 10(1) Jan/Feb 2016 https://journals.lww.com/journaladdictionmedicine/Fulltext/2016/02000/The_Prevalence_of_Substance_Use_and_Other_Mental.8.aspx

devoted to address the issues of mental health and substance abuse within the legal profession, through prevention, as well as lawyers' assistance programs and, where necessary, treatment intervention. That 2016 study cited data from a 1990 study, specific to Washington State lawyers, which found that 18% of lawyers in Washington, at that time, were "problem drinkers," compared with an estimated 10% among American adults in the general population. The 1990 study found that 19% of Washington lawyers suffered from statistically significant elevated levels of depression, contrasted with estimated levels of depression in Western industrialized countries in the range of 3% - 9%.

Similarly, a recent survey conducted by ALM Intelligence and Law.com ("ALM Study")[46] found:

- 74% of respondents feel the legal profession has had a "negative impact" on their mental health;
- 44% use alcohol to deal with stress;
- 10% self-identify as having a problem with alcohol;
- 4% use illegal drugs or abuse prescription drugs to deal with stress;
- 64% feel they suffer from anxiety;
- 31% self-identify as depressed;
- 74% feel their work environment contributes negatively to their own or colleagues' well-being;
- 18% have contemplated suicide at some point in their careers.

Beyond self-assessment by respondents, the ALM Study also found that 62% of respondents know a colleague who is depressed, and 50% know a colleague with an alcohol problem.

Moreover, actual and perceived stigma is a contributing factor to mental health and addiction issues in lawyers. The ALM Study found that 65% of respondents felt they could not take extended leave to tend to mental health issues, and 77% were fearful of what their employer would think if they sought treatment through an extended leave.

Continuing Legal Education Can Assist in Ameliorating Mental Health Issues, and Therefore the Competence of Practitioners.

The need to address these issues, and to do so as early as possible, relates directly to competence and fitness to practice law. The proposal to require one hour of MCLE credit every three years is a crucial link in addressing this problem. While other elements are necessary to address the problem, including lawyers' assistance programs, available treatment, etc., the MCLE requirement is an entry point to provide a broad base of legal professionals with the knowledge they need for self-assessment, creating avenues of community care to reduce mental health stigma in the legal profession, and knowledge and understanding of available tools and programs, including new developments.

A typical course may include current legal requirements and standards concerning competence and mental health issues, whether in oneself or colleagues; available resources, including lawyers' assistance programs; data concerning the prevalence of mental health issues in the profession; deeper understanding of the nature of mental health issues; tools for self-assessment; common warning signs in colleagues, and deeper understanding of causes and treatments.

The courses accredited to fulfill this requirement should not be designed nor viewed as a substitute for treatment. Nonetheless, requiring every legal professional to devote one hour every three years to education concerning these

[46]ALM's Mental Health and Substance Abuse Survey (2020), reported and summarized by Leigh Jones, *Lawyers Reveal the Truth Depth of Mental Health Struggles, ALM's Mental Health and Substance Abuse Survey*, https://www.law.com/international-edition/2020/02/19/lawyers-reveal-true-depth-of-the-mental-health-struggles-378-134739/ (February 19, 2020); see also, *By the Numbers: The State of Mental Health in the Legal Industry*, https://www.law.com/2020/02/19/by-the-numbers-the-state-of-mental-health-in-the-legal-industry/ (February 19, 2019)

crucial issues will elevate the profession, improve the overall quality of legal services, and, ultimately, encourage greater public confidence in the integrity of the profession. Moreover, this requirement may encourage members to seek the help they need, and others to be supportive of their colleagues, while maintaining standards of excellence in the practice of law.

Other Jurisdictions with Mandatory Mental Health CLE Requirements

In 2017 the ABA adopted the Model Rule for Minimum Continuing Legal Education and Comments ("ABA Model Rule")[47], the first such promulgation since 1988. In addition to the inclusion of a diversity and inclusion requirement, one of the main highlights was the addition of a model mental health MCLE requirement. As the ABA stated:

> *The Mental Health and Substance Use Disorder Credit recognizes that requiring all lawyers to receive education about these disorders can benefit both individual lawyers and the profession. This requirement is in part a response to the 2016 landmark study conducted by the Hazelden Betty Ford Foundation and the American Bar Association Commission on Lawyer Assistance Programs, entitled, "The Prevalence of Substance Use and Other Mental Health Concerns Among American Attorneys."*[48]

At the time, only five states had any form of mental health MCLE requirement. At present, at least eight states (as well as the U.S. Virgin Islands) have adopted some form of this requirement.

The clear trend is toward states and other jurisdictions adopting some form of a mandatory mental health CLE, whether as a separate requirement, or couched in terms of a "professional competence" requirement. This trend suggests the importance and value of a mandatory mental health CLE. The CLE requirement elevates the importance of mental health and self-care for legal professionals. Introducing this requirement can destigmatize mental health and promote awareness and self-care. By adding a required credit in Mental Health, Washington will join other states who recognize the necessity and value of this type of education to the legal profession.

CONCLUSION

Based on the above discussion detailing the importance of the subjects required in the potential suggested amendments, the MCLE Board recommends amending APR 11 to include a one credit requirement every three years for mental health and technology security. It is the belief of the Board that these requirements increase the protection of clients and the public and improve legal professional competency and integrity.

WSBA RISK ANALYSIS: *This section is to be completed by the Office of General Counsel, with input from the proposing entity or individual.*
The proposed amendments do not present legal risk.

WSBA FISCAL ANALYSIS: *This section is to be completed by the Finance Department, with input from the proposing entity or individual.*
The fiscal impact to WSBA resulting from the proposed changes includes a limited amount of staff time used to incorporate amendments in relevant records and WSBA IT software development time (approximately 40 hours total) to for coding to incorporate reporting requirement changes into the MCLE system. The staff time that would

[47] See ABA Model Rule for Minimum Continuing Legal Education, American Bar Association (February 6, 2017), https://www.americanbar.org/content/dam/aba/directories/policy/midyear-2017/2017_hod_midyear_106.pdf.
[48] ABA Model Rule Implementation Resources, American Bar Association (February 2017), https://www.americanbar.org/events-cle/mcle/modelrule/.

be allocated to this work is included in the overall duties of existing WSBA staff and would not require additional staff or allocation of resources from other internal sources.

WSBA EQUITY ANALYSIS: *This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.*
The proposed changes do not present any concerns about inequities.

Attachments

- MCLE Board's Suggested Amendments to APR 11 – redline
- MCLE Board's Suggested Amendments to APR 11 – clean
- Public Comment and Feedback on Preliminary Suggested Amendments
- WSBA CLE Memo
- WSBA Committee on Professional Ethics Letter
- WSBA Member Wellness Program Memo
- WSBA Practice Management Assistance Program Memo

SUGGESTED AMENDMENTS TO ADMISION AND PRACTICE RULES

ADMISSION AND PRACTICE RULES (APR)

RULE 11. MANDATORY CONTINUING LEGAL EDUCATION (MCLE)

(a) – (b) [Unchanged.]

(c) Education Requirements

(1) Minimum Requirement. Each lawyer must complete 45 credits and each LLLT and LPO must complete 30 credits of approved continuing legal education by December 31 of the last year of the reporting period with the following requirements:

(i) at least 15 credits must be from attending approved courses in the subject of law and legal procedure, as defined in subsection (f)(1); ~~and~~

(ii) at least ~~six~~ five credits must be in ethics and professional responsibility, as defined in subsection (f)(2);~~, with at least one credit in equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law.~~

(iii) at least one credit must be in equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law;

(iv) at least one credit must be in the subject of technology security, as defined in subsection (f)(9); and

(v) at least one credit must be in the subject of mental health as defined in subsection (f)(10).

(2) – (6) [Unchanged.]

(7) Carryover Credits. If a lawyer, LLLT or LPO completes more than the required number of credits for any one reporting period, up to 15 of the excess credits~~, 2 of which may be ethics and professional responsibility credits,~~ may be carried forward to the next reporting period subject to the following limitations:

(A) Only two of the 15 allowed carryover credits can be in the subject of ethics and

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professional responsibility;

(B) Credit requirements for the subjects of mental health; technology security; and equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law cannot be fulfilled in whole or in part with carryover credit from a prior reporting period;

(C) Excess credits from subsections (c)(1)(iii), equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law; (c)(1)(iv), technology security; and (c)(1)(v), mental health, carry over as "Other" credits as defined in subsection (j)(1).

(d) – (e) [Unchanged.]

(f) Approved Course Subjects. Only the following subjects for courses will be approved:

(1) *Law and legal procedure*, defined as legal education relating to substantive law, legal procedure, process, research, writing, analysis, or related skills and technology;

(2) Ethics and professional responsibility, defined as topics relating to the general subject of professional responsibility and conduct standards for lawyers, LLLTs, LPOs, and judges~~, including equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law, and the risks to ethical practice associated with diagnosable mental health conditions, addictive behavior, and stress~~;

(3) – (7) [Unchanged.]

(8) *Equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law*;

(9) *Technology security*, defined as subjects that educate and inform lawyers, LLLTs, or LPOs about cybersecurity in the legal profession and the practice of law including protection of

confidential, privileged, and proprietary information; client counseling and consent; storage protection policies and protocols; risk and privacy implications; protection of escrow funds; inadvertent and unauthorized electronic disclosure of confidential information, including through social media, data breaches and cyber-attacks; and supervision of employees, vendors, and third parties; and

(10) Mental health, defined as subjects that educate and inform lawyers, LLLTs, or LPOs about, but not treatment for, mental health issues in the legal profession and the practice of law including substance abuse, addictive behaviors, anxiety disorders, bipolar disorder, depression, schizophrenia, stress management, suicide prevention, and work-life balance.

(g) – (i) [Unchanged.]

(j) Sponsor Duties. All sponsors must comply with the following the duties unless waived by the Bar for good cause shown:

(1) The sponsor must not advertise course credit until the course is approved by the Bar but may advertise that the course credits are pending approval by the Bar after an application has been submitted. The sponsor shall communicate to the lawyer the number of credits and denominate whether the credits are; "law and legal procedure" as defined under subsection (f)(1);~~,~~ "ethics and professional responsibility" as defined under subsection (f)(2);~~,~~ "equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law" as defined under subsection (f)(8); "technology security" as defined under subsection (f)(9); "mental health" as defined under subsection (f)(10); or "other," meaning any of the other subjects identified in subsections (f)(3)-(7).

(2) – (7) [Unchanged.]

(k) [Unchanged.]

SUGGESTED AMENDMENTS TO ADMISION AND PRACTICE RULES

ADMISSION AND PRACTICE RULES (APR)

RULE 11. MANDATORY CONTINUING LEGAL EDUCATION (MCLE)

(a) – (b) [Unchanged.]

(c) Education Requirements

(1) Minimum Requirement. Each lawyer must complete 45 credits and each LLLT and LPO must complete 30 credits of approved continuing legal education by December 31 of the last year of the reporting period with the following requirements:

(i) at least 15 credits must be from attending approved courses in the subject of law and legal procedure, as defined in subsection (f)(1);

(ii) at least five credits must be in ethics and professional responsibility, as defined in subsection (f)(2);

(iii) at least one credit must be in equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law;

(iv) at least one credit must be in the subject of technology security, as defined in subsection (f)(9); and

(v) at least one credit must be in the subject of mental health as defined in subsection (f)(10).

(2) – (6) [Unchanged.]

(7) Carryover Credits. If a lawyer, LLLT or LPO completes more than the required number of credits for any one reporting period, up to 15 of the excess credits may be carried forward to the next reporting period subject to the following limitations:

(A) Only two of the 15 allowed carryover credits can be in the subject of ethics and professional responsibility;

(B) Credit requirements for the subjects of mental health; technology security; and equity,

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inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law cannot be fulfilled in whole or in part with carryover credit from a prior reporting period;

(C) Excess credits from subsections (c)(1)(iii), equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law; (c)(1)(iv), technology security; and (c)(1)(v), mental health, carry over as "Other" credits as defined in subsection (j)(1).

(d) – (e) [Unchanged.]

(f) Approved Course Subjects. Only the following subjects for courses will be approved:

(1) Law and legal procedure, defined as legal education relating to substantive law, legal procedure, process, research, writing, analysis, or related skills and technology;

(2) Ethics and professional responsibility, defined as topics relating to the general subject of professional responsibility and conduct standards for lawyers, LLLTs, LPOs, and judges;

(3) – (7) [Unchanged.]

(8) Equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law;

(9) Technology security, defined as subjects that educate and inform lawyers, LLLTs, or LPOs about cybersecurity in the legal profession and the practice of law including protection of confidential, privileged, and proprietary information; client counseling and consent; storage protection policies and protocols; risk and privacy implications; protection of escrow funds; inadvertent and unauthorized electronic disclosure of confidential information, including through social media, data breaches and cyber-attacks; and supervision of employees, vendors, and third parties; and

(10) Mental health, defined as subjects that educate and inform lawyers, LLLTs, or LPOs about, but not treatment for, mental health issues in the legal profession and the practice of law including substance abuse, addictive behaviors, anxiety disorders, bipolar disorder, depression, schizophrenia, stress management, suicide prevention, and work-life balance.

(g) – (i) [Unchanged.]

(j) Sponsor Duties. All sponsors must comply with the following the duties unless waived by the Bar for good cause shown:

(1) The sponsor must not advertise course credit until the course is approved by the Bar but may advertise that the course credits are pending approval by the Bar after an application has been submitted. The sponsor shall communicate to the lawyer the number of credits and denominate whether the credits are: "law and legal procedure" as defined under subsection (f)(1); "ethics and professional responsibility" as defined under subsection (f)(2); "equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law" as defined under subsection (f)(8); "technology security" as defined under subsection (f)(9); "mental health" as defined under subsection (f)(10); or "other," meaning any of the other subjects identified in subsections (f)(3)-(7).

(2) – (7) [Unchanged.]

(k) [Unchanged.]

Those Against the MCLE Board's Preliminary Suggested Amendments		
Your Name	**Your relationship to WSBA**	**Comments and Feedback**
Amanda Masters	Licensed legal prof+G151:G230essional (Lawyer, LLLT, LPO)	
Jacquelyn Goetz	Licensed legal professional (Lawyer, LLLT, LPO)	
Jason Wilson-Aguilar	Licensed legal professional (Lawyer, LLLT, LPO)	
Danielle Dallas	Licensed legal professional (Lawyer, LLLT, LPO)	
Annie Cole	Licensed legal professional (Lawyer, LLLT, LPO)	
Chelsie Warner	Licensed legal professional (Lawyer, LLLT, LPO)	
aida almasalkhi	Licensed legal professional (Lawyer, LLLT, LPO)	
Laura Brindley	Licensed legal professional (Lawyer, LLLT, LPO)	
Andrew Fisher	Licensed legal professional (Lawyer, LLLT, LPO)	
Eric Allen	Licensed legal professional (Lawyer, LLLT, LPO)	
Christopher Davis	Licensed legal professional (Lawyer, LLLT, LPO)	CLE requirements are already a bit of a tangled mess. Adding a new category will only makes this worse. Therefore, while I understand the need for attorneys to understand the legal and ethical risks around technology, increasing the CLE burden in terms of both credits and compliance complexity seems a poor way to achieve the needed result.
Gary Grotz	Licensed legal professional (Lawyer, LLLT, LPO)	
Emily Carlin	Licensed legal professional (Lawyer, LLLT, LPO)	Please don't make CLE requirements more complicated.
Dominic Lindauer	Licensed legal professional (Lawyer, LLLT, LPO)	The proposed suggested amendment is unnecessary.
Susan Jones	Licensed legal professional (Lawyer, LLLT, LPO)	
Angela Sawyer	Licensed legal professional (Lawyer, LLLT, LPO)	
Margo Nguyen	Licensed legal professional (Lawyer, LLLT, LPO)	These can be offered within the required ethics requirement.
Toni Meacham	Licensed legal professional (Lawyer, LLLT, LPO)	We already have adequate requirements. This can be incorporated into the CLEs already required, not an additional requirement.
Rebecca Mader	Licensed legal professional (Lawyer, LLLT, LPO)	
Tom Overcast	Licensed legal professional (Lawyer, LLLT, LPO)	What will be the next special interest that will require additional credits in a specialized area that isn't applicable to me? Seems this is a slippery slope as has been case with the creation of sections of the bar.
Patricia W Eby	Licensed legal professional (Lawyer, LLLT, LPO)	I think it is good to have those ethics classes available. I do not agree they should be required every reporting period.
Breanna	Licensed legal professional (Lawyer, LLLT, LPO)	It is already hard enough to find CLEs that meet the requirements and to gain them in the allotted time with working - to require more specific CLEs would make it even harder and likely more expensive to attain.
Brooke Wright	Licensed legal professional (Lawyer, LLLT, LPO)	Lawyers need more focus on core ethics/RPCs, not these additional topics.
Wade Taylor	Licensed legal professional (Lawyer, LLLT, LPO)	CLE's are already burdensome. Adding additional requirements that are not in any way tailored to have relevance to an individuals practice only serves to make the requirements that much more unpalatable.
Christopher T. Benis	Licensed legal professional (Lawyer, LLLT, LPO)	Just makes it harder to stay licensed. I am close to retirement. Thus nonsense will probably force my hand.

Robbi Kesler	Licensed legal professional (Lawyer, LLLT, LPO)	While I believe those topics are valuable, I don't like adding additional categories as state specific mandatory for each reporting cycle. It's already hard enough to get all the CLEs, particularly for attorneys like myself that often get CLE credits at large national conferences and I'm not always sure they will count in WA.
Julie Murray	Licensed legal professional (Lawyer, LLLT, LPO)	
Kristi Denney	Licensed legal professional (Lawyer, LLLT, LPO)	
Catherine Blinn	Licensed legal professional (Lawyer, LLLT, LPO)	These are very narrow topics. The Bar should not require additional CLE hours on extremely narrow topics.
Martin Anderson	Licensed legal professional (Lawyer, LLLT, LPO)	MCLE is already a very wasteful and unnecessary exercise for most professionals (as evidenced by the fact that you exempt numerous categories of persons from compliance, e.g., Judges). Expanding the requirements just makes an unnecessary system more complicated.
D. Neil Olson	Licensed legal professional (Lawyer, LLLT, LPO)	
Sam Barker	Licensed legal professional (Lawyer, LLLT, LPO)	
Chris Williams	Licensed legal professional (Lawyer, LLLT, LPO)	Please don't make things too complicated. Professionals find out what they need to know, regardless of topic, so this could actually become limiting in terms of promoting enhanced knowledge across the bar. If a specific skill or issue is so important everyone should know it, send every lawyer a letter/email saying what it is. That is more targeted and more effective.
Brittany	Licensed legal professional (Lawyer, LLLT, LPO)	There are too many categories that CLEs must come from. It's hard enough already to make sure we're getting credits in the right categories. As a lawyer licensed in multiple states, this becomes a logistical nightmare. I suggest putting out more CLEs in these topics so that they are easier for lawyers to watch, rather than mandating specific categories.
Adam Walters	Licensed legal professional (Lawyer, LLLT, LPO)	It is already very difficult for those of us who practice and are licensed in multiple jurisdictions to keep track of all the various new Ethics requirements that states are imposing. Mandatory CLE's not related to one's practice area are ineffective anyway and just serve as an annoyance to most practitioners.
Annaliese Harksen	Licensed legal professional (Lawyer, LLLT, LPO)	
David Lake	Licensed legal professional (Lawyer, LLLT, LPO)	I'm licensed in other states that have similar mental health CLE requirements. From my standpoint, it is a waste of time and money. If there are mental health issues I need to address, I know there are resources available. My license should not hinge on whether I listen to a lecture on a personal/non-professional matter.
Carol Ann Churchill	Licensed legal professional (Lawyer, LLLT, LPO)	If you add more credits in one area, remove them from another. I am too old to care about IT and will probably die while shredding my legal files. I would have preferred to get the IT lessons about 20 years ago. Keep the on line courses going. I like to learn for the sake of learning, but do not want to be mandated to do anything.
Frederick Haist	Licensed legal professional (Lawyer, LLLT, LPO)	

Jordan Urness	Licensed legal professional (Lawyer, LLLT, LPO)	I'm opposed to the Suggested Amendment because the Board should be focused on continuing LEGAL education. Ethics of tech, mental health, etc. are great topics but are not central to the practice of law. We should also eliminate requirement to obtain a credit in the topic of equity, inclusion, and the mitigation of bias. The state bar should be focused on LEGAL education - not advancing a social, political, or religious agenda.
Stephanie Dikeakos	Licensed legal professional (Lawyer, LLLT, LPO)	
Lindy Laurence	Licensed legal professional (Lawyer, LLLT, LPO)	I don't see the need to add additional and specific ethics requirements to our MCLE obligations. I don't believe that technology security and mental health are topics that should be required for every attorney. If the Bar wants to make these CLEs available, then allow attorneys to self-select into those CLE events, but please do not add another burdensome requirement for attorneys who will not find this helpful, useful, or necessary to their practice.
Scott Peters	Licensed legal professional (Lawyer, LLLT, LPO)	Stop making this mandatory and dictating specific things we have to cover. If you want to say mental health ethics and technology security ethics will count as ethics, that is fine. But do not require it. Forcing people to take it will not be helpful. Those of us who want to take it will take it without being forced. Some of us get it through our work or from other things we are involved with. If you want to encourage people to do it then allow it to count. Forcing it upon people will never reach the outcome you want.
Ivana Guida	Licensed legal professional (Lawyer, LLLT, LPO)	I personally like to take mental health CLEs. However, as it already happens with the ethics CLEs, it's hard to find them and making those required would put additional stress on the completion of the CLE requirements. Since the goal of mental health CLEs is also to reduce stress, I am not in favor of creating additional requirements that can be hard to fulfill, therefore leading to the opposite result of instead creating more stress.
Shane Noworatzky	Licensed legal professional (Lawyer, LLLT, LPO)	
Brian G Gosline	Licensed legal professional (Lawyer, LLLT, LPO)	Many of us NEVER have any dealings in these particular area - we are bound by our ethics rules and those rules already govern us. They are broad enough to cover these areas. If courses are offered in those areas, then each attorney could choose for themselves what interests them.
Joseph Banks	Licensed legal professional (Lawyer, LLLT, LPO)	Once more, the Bar Association (who apparently has nothing else to do but come up with ADDITIONAL requirements for legal professionals) continues to increase the burden on members of the Bar by proposing to require NEW categories of MCLE credits. This has to stop. It is already an expensive and time consuming burden to get 15 credits yearly. Now, in addition to securing ethics and diversity credits, we now may need to also pursue "mental health" and "technology security ethics" credits? This is ridiculous. The Bar Association should not be adding to our burdens like this. Each attorney is best equipped to decide what education they should pursue; it should not be forced down our throats like this.

Charles W Bates	Licensed legal professional (Lawyer, LLLT, LPO)	This forces me to take CLE credits on topics that I do not deal with in my practice. More and More the bar association is "slicing and dicing" topics thinner and thinner. I would rather focus on topics that I do deal with daily and consider to be important for me.
Scott Jackson	Licensed legal professional (Lawyer, LLLT, LPO)	We already have enough ethics requirements, we do not need more.
Scott Frost	Licensed legal professional (Lawyer, LLLT, LPO)	We have to many specialized requirements already. To hard to keep track of and making people take mandatory topics helps no one.
Brendan Brophy	Licensed legal professional (Lawyer, LLLT, LPO)	
Eric Schuler	Licensed legal professional (Lawyer, LLLT, LPO)	It makes no sense to add more CLEs to the required amount. These additions will do little to nothing to help people understand mental health issues and security issues. Many people are set in their own ways and without actually having to deal with people with mental illness they will simply not understand or not participate. this is a useless attempt at education and only serves to add additional costs to licensing.
Brandon Keith	Licensed legal professional (Lawyer, LLLT, LPO)	
Joel Ard	Licensed legal professional (Lawyer, LLLT, LPO)	MCLE requirements are being sliced and diced into plenty of people's pet projects. The dismally low quality and applicability of the "equity" material is a great example of the diminishing returns on trying to create a detailed MCE curriculum. Stop while you are only a little behind.
Travis Lindsey	Licensed legal professional (Lawyer, LLLT, LPO)	It baffles me that WSBA views licensed attorneys as irresponsible children and that it is WSBA's duty to parent us all. I would much rather devote my precious time and CLE selections to courses that will assist with substantive knowledge and/or skills in particular subject areas relevant to my clients and practice areas.
Zak Griefen	Licensed legal professional (Lawyer, LLLT, LPO)	I think that the current MCLE requirements for ethics credits are sufficient. Thank you.
Arianna Cozart	Licensed legal professional (Lawyer, LLLT, LPO)	The micromanagement (?) of our CLE credits is getting ridiculous.
Kathleen Galioto	Licensed legal professional (Lawyer, LLLT, LPO)	I'm not in favor of increasing total required ethics credits. As it stands right now, you can simply allow lawyers/legal professionals to satisfy the ethics credit requirements by taking CLEs covering the 4 separate categories (mental health, technology security, etc.). Expand the scope of allowable topics that fit under the ethics umbrella but not the credit requirement.
Irving Sonkin	Licensed legal professional (Lawyer, LLLT, LPO)	The suggested amendment covers issues that I never come across as a licensed attorney. The requirement is burdensome and not a good use of my funds nor my time
Kent Meye	Licensed legal professional (Lawyer, LLLT, LPO)	There is no need to further micromanage the types of classes that lawyers take to fulfill the MCLE requirement.
Michele Tyler	Licensed legal professional (Lawyer, LLLT, LPO)	
Mariah Harrod	Member of the public	MCLE should not impose further requirements unless it is absolutely certain that those requirements are accessible to all members. If these CLEs are abundant, then such a change is more reasonable than if the change happens completely top-down without considering the feasibility of fulfilling these new requirements.

Zack Naqvi	Licensed legal professional (Lawyer, LLLT, LPO)	Not in favor of additional MCLE requirements because of the additional inconvenience. If they shall be added, I do like the free, online MCLEs.
Alexander Paukert	Licensed legal professional (Lawyer, LLLT, LPO)	Respectfully, I do not see these additional credits creating a meaningful enough benefit to justify the cost and time commitment.
Mark Millen	Licensed legal professional (Lawyer, LLLT, LPO)	The ever increasing micromanagement of MCLE content by the bar is both unhelpful and unwarranted. Lawyers self interest, coupled with E&O carrier requirements, are more than enough reason to stay mentally healthy and to take reasonable efforts to secure data. Stop with the pet project MCLE content directives. WA state already emands far more MCLE per year than AK and CA (i am a member of all 3) and every state is demanding more and more specific courses which becomes an absurd burden for muti-state attorneys.
Cyrus Christenson	Licensed legal professional (Lawyer, LLLT, LPO)	Let me manage my own practice.
Scott S. Anders	Licensed legal professional (Lawyer, LLLT, LPO)	Quit adding unnecessary burdens.
Al Van kampen	Licensed legal professional (Lawyer, LLLT, LPO)	Please stop micromanaging the nature of CLE credits we choose. We are professionals entrusted with significant responsibilities to our clients and the public, and in a far better position that you to know which CLEs will be most helpful.
Robert Whitsitt	Licensed legal professional (Lawyer, LLLT, LPO)	
Rod Fonda	Licensed legal professional (Lawyer, LLLT, LPO)	I hesitate to ask what "equity ethics" might be. I think the WSBA has gone way overboard past law into politics. The primary focus for the WSBA should be lawyers as lawyers, not as political animals; that task is up to others, NOT the WSBA. To the extent that justice and equal treatment by the courts is concerned, fine. I have attended a number of Legal Lunchbox seminars that have gone way over the left edge. The WSBA needs to retreat from that expansion of its sphere of interest.
Paul M Larson	Licensed legal professional (Lawyer, LLLT, LPO)	There are enough CLE requirements. These courses will not make anyone a better lawyer, nor improve client services. Anyone who could benefit from this training, will ignore it and do what is in their nature to do.
Lewis Harrington	Licensed legal professional (Lawyer, LLLT, LPO)	The requirements in WA are already onerous compared to other Northwestern states. At this point the State should be paying us to take all of these NOT us paying you to eat up time I need to pay off student loans. To be clear..I am not saying it is a waste of time as it is a worthwhile subject but where does it end?
Katherine Mathews	Licensed legal professional (Lawyer, LLLT, LPO)	Obtaining ethics credits is difficult already. Trying to find CLEs that satisfy an ethics requirement this specific in addition to the already hefty ethics requirements will be unduly burdensome.
Randolph J St. Clair	Licensed legal professional (Lawyer, LLLT, LPO)	Not in favor. I get plenty of mandatory training from the US DOJ on these subject areas but nothing that would qualify for CLE credit in these proposed very specific/narrow "ethics" subject areas. Unless the bar is going to provide free online CLEs to take care of the new requirements, this seems a bit onerous and overboard to me.
Laura Henderson	Licensed legal professional (Lawyer, LLLT, LPO)	There are already enough hoops to jump through.

Jason McInnes	Licensed legal professional (Lawyer, LLLT, LPO)	This is going to be a slippery slope. Why mental health ethics and not some other form of ethics? If we need more ethics education, add an additional credit, but I don't think we should be adding more "kinds" of ethics credits. Technology familiarity in today's society is important, but maybe make that a skills requirement instead of an "ethics" requirement. I think we're going to end up going down a rabbit hole over why some topics get separate ethics credit requirements and others don't. Or create a rotating credit that is different every reporting period and can evolve as our concerns over ethics education evolve. Have the membership vote on what the new ethics topic should be for the reporting period.
Alexander Ransom	Licensed legal professional (Lawyer, LLLT, LPO)	There's no need to shoulder more CLE requirements on already-burdened attorneys.
Joseph Lipinsky	Licensed legal professional (Lawyer, LLLT, LPO)	
Joseph Beck	Licensed legal professional (Lawyer, LLLT, LPO)	I don't see this as necessary and it adds additional complexity to obtaining CLE credits. I don't support this.
Chris Cowgill	Licensed legal professional (Lawyer, LLLT, LPO)	Instead of mandating the types of ethics credits lawyers must take, WSBA should concentrate on offering more options to chose from.
Matt Lincicum	Licensed legal professional (Lawyer, LLLT, LPO)	I believe the ethics training materials should be limited to those aspects that are specific to the legal profession and associated professional responsibility. General aspects such as technology security, mental health, or equity for that matter, should not fall under this umbrella. Moreover, increasing the burden of training requirements should generally be disfavored, as such trainings provide no measurable benefits to the public or to the profession, and increase the costs of compliance and monitoring.
Paul Goulding	Licensed legal professional (Lawyer, LLLT, LPO)	this is getting way too complicated. So now we are supposed to somehow track down credits in technology and mental health? Too much.
Franco Becia	Licensed legal professional (Lawyer, LLLT, LPO)	
Mary Duncan	Licensed legal professional (Lawyer, LLLT, LPO)	It seems unnecessary
Bonnie S. Speir	Licensed legal professional (Lawyer, LLLT, LPO)	Are you serious?! Too much. Enough already. Just stop. Provide CLEs that will educate lawyers on the proposed new topics to fill the ethics requirement and let them choose what is pertinent to their practice. Lawyers have enough to worry about without complying with this suggested amendment. "The amendments would increase the total credit requirements in the area of legal ethics to eight credits, and create four distinct categories of legal ethics: (1) general ethics and professional responsibility; (2) equity ethics; (3) technology security ethics; and (4) mental health ethics." Unbelievable.
Elizabeth McAmis	Licensed legal professional (Lawyer, LLLT, LPO)	The sub-categories should not be added as professionals should be able to determine the ethics learning that is most applicable to their practice. The different sub-categories may also create barriers for some licensees, and potentially increase the cost of CLEs since certain categories would be mandated (again, a barrier for some licensees).
Faisal Akhter	Licensed legal professional (Lawyer, LLLT, LPO)	
Randall Wilburn	Licensed legal professional (Lawyer, LLLT, LPO)	

Peter T. Connick	Licensed legal professional (Lawyer, LLLT, LPO)	WSBA is really useless. We pay annual dues to have WSBA bother most of us and impose non-sensical requirements. Truly useless!
Steven P. Pyle	Licensed legal professional (Lawyer, LLLT, LPO)	We have enough requirements as it is and this simply adds another layer of self-management to the already lengthy list. My personal mental health would be best served to leave things as is. I am a professional and should be allowed to assess what it is I need to best keep myself abreast of the things I need to stay on top of my ability to offer the best in legal services. No mental health CLE course is going to direct my mental health. I will need to set in motion the things I need to stay healthy, or recognize that I need help and seek it out. A CLE requirement is not going to help in achieving optimal or even "good" mental health. As for the tech, it is and has been for years now, learn it or get left behind. And there is plenty of help available. Again, I do not believe we need someone to tell us how to stay abreast of the times. Now, if you were offering free hours to achieve this, that would be different. But, that is not on the table and we all know, nothing comes for free.
Rebecca Dellicker	Licensed legal professional (Lawyer, LLLT, LPO)	This is overly complicating things and frustrating access to easily completing needed CLEs. CLEs in these areas should be easily available to members (in fact, should be free), but making them required makes things too complex. I would personally rather go back to no specific categories of ethics credits in order to have attorneys focusing on whatever area of ethics they don't know as much about or wanted a refresher in rather than mandating a specific breakdown of credits.
Heidi Baxter	Licensed legal professional (Lawyer, LLLT, LPO)	I think ethics is ethics and creating more categories is ridiculous. Many attorneys don't even pay any attention to what the ethics topic is, they just punch the ticket. If you feel that we need mental health and technology security ethics credits, then just start making them block options at WSBA CLEs and let people choose what they think they need/want or can learn from. It would be like telling us we need 5 CLE credits from Real Property, 5 CLE credits from Criminal Law, 5 CLE Credits from Civil...
Susan West	Licensed legal professional (Lawyer, LLLT, LPO)	Stop slicing and dicing the CLE requirements please. This new rule imposes a blanket rule on everyone and you really have no idea which lawyers would really benefit from it (and for which this will be a waste of time). We're not all the same and you've done no work, as far as I can tell, to determine the breadth of practices in the WSBA. I know you've never asked me anything about my practice, and since what I do is very far outside the stereotypical legal practice, you can't possibly be taking into account what my CLE requirements really should be. Please stop assuming you know what we're doing out here in the field and assigning CLE requirements based on your assumptions. And please trust us to pick and choose based on what we believe we need education in. We got through law school and the bar; you can trust us to make good CLE choices.

Bruce Medeiros	Licensed legal professional (Lawyer, LLLT, LPO)	The additional defined areas of ethics are not necessary. Raising the required ethics credits to 8 is not justified and with the proposed additional types of ethics credits required will only place additional burdens on attorneys to seek out the credits in the specific areas. No meaningful change to the practice of law in Washington will result from the Suggested Amendment.
Christopher Marsik	Licensed legal professional (Lawyer, LLLT, LPO)	
Timothy McLaughlin	Licensed legal professional (Lawyer, LLLT, LPO)	This is getting ridiculous. Too many requirements.
Robert Miller	Licensed legal professional (Lawyer, LLLT, LPO)	Any benefits would be marginal, and we don't have time for this.
Craig Cahoon	Licensed legal professional (Lawyer, LLLT, LPO)	
Elizabeth MacLachlan	Licensed legal professional (Lawyer, LLLT, LPO)	This requirement would not increase the competency of lawyers in providing for their clients and would complicate the MCLE requirements unnecessarily.
Rachel Harper	Licensed legal professional (Lawyer, LLLT, LPO)	
Tom Sackmann	Licensed legal professional (Lawyer, LLLT, LPO)	These topics should be included where appropriate in CLE offerings but not established as separate requirements.
Jeff Tolman	Licensed legal professional (Lawyer, LLLT, LPO)	The WSBA seems to be placing many non-continuing EDUCATION requirements on the practitioners. The Legal Lunchbox series, for example - which I think is great - as often as not is about the practitioner - how to deal with stress, how to balance your life - than actual education about the law. These proposed areas are important, but let the lawyers determine their comfort level about these areas. Just my thoughts...
Yahya Shakir	Licensed legal professional (Lawyer, LLLT, LPO)	
Brett Nelson	Licensed legal professional (Lawyer, LLLT, LPO)	
Alan Zarky	Licensed legal professional (Lawyer, LLLT, LPO)	Everyone knows (though the Bar pretends not to, sort of like judges pretending not to know that many cops lie to avoid suppression of evidence) that most MCLE is just money-making for the companies that produce them. This is perhaps especially true of the ethics requirement (though at times a good ethics program can get to the tougher problems for which there is no solution but can give one a good way of thinking about it). Don't add to the requirement; if you feel compelled to require these, require 1/2 hour of each and include it in the current requirement.
Sherri Farr	Licensed legal professional (Lawyer, LLLT, LPO)	Ethics credits are not easily obtainable. I'd be in favor ONLY if the Bar offered these CLEs with creditors 2 to 3 times per year, making the ability to obtain the credits reasonable.
Anna Johnsen	Licensed legal professional (Lawyer, LLLT, LPO)	This suggested amendment would make it more difficult to receive CLE credit from the national on-demand CLE services that so many of us use. It's my understanding that some CLEs will be offered for free through a different service, but I think WA lawyers should be able to use their own discretion to evaluate which CLEs will best assist them and their practice areas. This amendment seems to complicate the process of getting all of the required credits by creating the four subcategories within the category of ethics.
Andrew	Licensed legal professional (Lawyer, LLLT, LPO)	We don’t need more restricted requirements to meet the MCLE. An optional phase could be implemented to ensure there’s enough classes for people to meet the requirement, then re-evaluated.
Awesta Masshoor	Licensed legal professional (Lawyer, LLLT, LPO)	

Lindsey Wagner	Licensed legal professional (Lawyer, LLLT, LPO)	
Charlotte Smith	Licensed legal professional (Lawyer, LLLT, LPO)	I'm a mom of three, it's hard enough earning these without more. If you must add, reduce requirements in other categories.
Jeannie Gorman	Licensed legal professional (Lawyer, LLLT, LPO)	I don't often lean libertarian but this proposal justifies why some do. There is a giant danger in legislating exactly what every single lawyer (oops: legal professional) needs to 'be educated on' and not treating them as adults, fully capable of understanding and embracing their unique sets of obligations. Leave it alone! Let us decide for ourselves what to spend massive amounts of CLE time and money on. Really. Please.
Susan Koeppen	Licensed legal professional (Lawyer, LLLT, LPO)	This would make obtaining ethics credits extremely complicated, and would probably drive up expenses. What if these courses are not frequently offered? Mandatory ethics training on specific ethics topics would cause me to give up my Washington state license upon retirement, which I will do in the next few years.
Sonja Halverson	Licensed legal professional (Lawyer, LLLT, LPO)	This is one more thing to manage for already overworked and overwhelmed attorneys.
No comment.	Licensed legal professional (Lawyer, LLLT, LPO)	No value for attorneys for this training
Jon Jurich	Licensed legal professional (Lawyer, LLLT, LPO)	
Sandra Trapnell	Licensed legal professional (Lawyer, LLLT, LPO)	
Richard Bueschel WSBA 17836	Licensed legal professional (Lawyer, LLLT, LPO)	Waste of time.
Ruth Kimball	Licensed legal professional (Lawyer, LLLT, LPO)	Too much micro managing. Attorneys should have more flexibility to learn what most helps them in their practice.
Jason Corbeille	Licensed legal professional (Lawyer, LLLT, LPO)	
Mel	Licensed legal professional (Lawyer, LLLT, LPO)	Too many subcategories for continuing legal education; there are plenty of CLEs currently offered that address these topics, no need to mandate them.
Michael R Addams	Licensed legal professional (Lawyer, LLLT, LPO)	I think this is overreach by the WSBA. There should be a requirement to get a certain number of credits total with the expectation that attorneys will decide for themselves what types of training would be most beneficial to their practice of law. The WSBA should not be deciding for its members.
Alexandra Gilbert	Licensed legal professional (Lawyer, LLLT, LPO)	
Curt Coyne	Licensed legal professional (Lawyer, LLLT, LPO)	Too much detailed regulation on everything, already. This is just bureaucracy expanding itself. Stop it. Do less not more.
Anita Yandle	Licensed legal professional (Lawyer, LLLT, LPO)	

Chris Rounds	Licensed legal professional (Lawyer, LLLT, LPO)	The MCLE requirements should be simplified instead of becoming more and more complicated. We are grownups, and we should have the discretion to choose the topics that will serve our own individual needs. A few years ago, we were inundated with CLEs on ethical concerns about technology. This proposal is way behind the times. My eyes roll into the back of my head when I see more CLEs being offered on this stuff. I'd also suggest that you take a look at the disciplinary notices. I see old-fashioned problems driving almost all of the cases. I don't see much if anything on technology-related problems. Don't fix things that aren't broken.
Stephen Biddle	Licensed legal professional (Lawyer, LLLT, LPO)	Technology competency is the responsibility of the ethics oversight function of the BAR. Failure of some lawyer to maintain this competency consistency should not create a burden on all through this remedy of increase continuing education. The more appropriate action would be advisory guidelines on expectations and strong enforcement of failure (ransonware etc). As to the mental health issues. Provide better BAR mental health through the ABA benefits program first, not tax our mental health further with more pedantic presentation. For many of us mental health is not an issue of understanding but space and energy. By that, I mean many of us who struggle with this are painfully aware of the causes and best practices but simply do not have space to use them. Increasing continuing education does nothing to abate these issues. It only forces them into the awareness of those who were previously willfully blind.
Michael J Edwards	Licensed legal professional (Lawyer, LLLT, LPO)	The addition of four new subcategories of ethics is absurd and unnecessary. The amendment fixes a problem that does not exist and appears only to create work/expense without good cause. Attorneys are required to maintain a minimum number of ethics CLE hours in keeping with the rules of professional responsibility. Adding additional categories that are not included or described in the rules of professional responsibility is unwarranted. Teaching lawyers that RPC 1.1 includes the obligation to be competent in matters of technology security and mental health ethics for example would be more helpful. Are the RPCs not already comprehensive enough? Adding new reporting requirements does not help folks who struggle with legal ethics and only creates an additional expense that is onerous for many attorneys including small or solo practitioners and those not living in King, Snohomish, or Pierce Counties.
Nick Nilan	Licensed legal professional (Lawyer, LLLT, LPO)	This will make tracking CLE equity credits overly complicated and confusing.
shawn morgan	Licensed legal professional (Lawyer, LLLT, LPO)	
Megan Frye	Licensed legal professional (Lawyer, LLLT, LPO)	Too many credits required already
Jake Ferderer	Licensed legal professional (Lawyer, LLLT, LPO)	Ethics credits are already difficult enough to obtain in each reporting period. Do not increase the requirement.

Heidi E Appel	Licensed legal professional (Lawyer, LLLT, LPO)	I would like to see the bar association focus on its primary responsibility of disciplining unethical attorneys that are harming the public rather than micromanaging CLE choices.
Melissa Alegre	Licensed legal professional (Lawyer, LLLT, LPO)	
Victor Cerda	Licensed legal professional (Lawyer, LLLT, LPO)	
L. Brooks Baldwin	Licensed legal professional (Lawyer, LLLT, LPO)	Too many distinctions on the ethics credits. I think it's just too much minutiae for us lawyers to have to figure out which buckets our ethics programming will need to fit into - and how to find the more obscure required programming. I prefer requiring a straight number of Ethics credits and leaving it up to each attorney to choose (or resort to) those they can or are able to take to fulfill the (general) requirement.
Gregory Scott Hoover	Licensed legal professional (Lawyer, LLLT, LPO)	Too much. Keep things simple.
Eric P. Johnson	Licensed legal professional (Lawyer, LLLT, LPO)	I fail to see the real benefit of this proposed change. It just adds more complexity to the CLE requirement
Chadwick Proctor	Licensed legal professional (Lawyer, LLLT, LPO)	While technology breaches and mental health are very important issues, they don't necessarily apply to every attorney in practice. It would be great to see the development of these areas in ethics offerings; however, mandating such would counter productive.
Karen Terwilleger	Inactive member	As an inactive member, I'm still trying to keep up with my CLE annual requirements. Increasing the number of ethics categories creates more reporting complexity without providing actual enhancements for ethics education. Better approaches would be to encourage members to earn their credits in Technology Security and Mental Health Ethics classes OR focus the WSBA CLE classes on those subjects. Complying with the CLE credit process is complex enough - we don't need more arbitrary credit classifications.
Heidi Irvin	Licensed legal professional (Lawyer, LLLT, LPO)	The rules are getting too complicated. Don't add to the problem.
STEPHEN O 'NEILL	Licensed legal professional (Lawyer, LLLT, LPO)	
David Gecas	Licensed legal professional (Lawyer, LLLT, LPO)	I appreciate having a wide variety of CLE topics to choose from. These topics are often suggested by Bar members who would like to learn more about a particular area. I previously practiced in a State where CLE's were available but not required. I attended many CLE's while I was there, and I did not get the feeling that fewer people attended CLE's. I prefer that system and am not in favor of increasing the number of required CLE's. With limited time for CLE training, I value the freedom to choose which CLE's will be most helpful to me.
Laura Waller	Licensed legal professional (Lawyer, LLLT, LPO)	
Stephen Kirby	Licensed legal professional (Lawyer, LLLT, LPO)	I think the ethics hours as they stand are sufficient. If the WSBA has concerns please modify rules not education.
Joseph Ward	Licensed legal professional (Lawyer, LLLT, LPO)	
Anita Redline	Licensed legal professional (Lawyer, LLLT, LPO)	No additional credit units. Keep the number of credit units but add the two types of credit units.

Devin McComb	Licensed legal professional (Lawyer, LLLT, LPO)	The increasing demands on lawyers should not originate from the WSBA - our clients and the overall economic environment create enough additional demands. Given the state of practice in Washington, I don't think requiring more CLE and requiring additional compliance tracking will benefit the practice of law. If WSBA wants to provide additional CLE to practitioners to address a concern, there are many venues/channels for those programs and WSBA could offer them for free to encourage participation. I have no doubt many would volunteer for these programs if they were offered in several forms and for free.
Kevin Fay	Licensed legal professional (Lawyer, LLLT, LPO)	I am not a fan of the continued laundry list of requirements for MCLE. If this keeps up, the CLE requirements will turn into a set curriculum. There are many lawyers for whom both of these requirements would be irrelevant and a waste of time. We ought to let lawyers pick and choose what continuing legal education would be most relevant and helpful to their practice.
Jeanette Henderson	Licensed legal professional (Lawyer, LLLT, LPO)	The proposal seems unnecessary. Just offer those kind of classes, but they should be optional in terms of fulfilling ethics credits.
Michael Lasky	Licensed legal professional (Lawyer, LLLT, LPO)	While the proposed action is well intentioned, I have practical experience from a state which did this sort of thing with CLE credit requirements, and it did not go well. There are three things wrong with this approach: 1. It will never end. The temptation to create ever more categories of mandatory CLE will not stop with this idea. There will be other ideas which have equal merit. 2. Washington does not have the clout of California and there will be few quality choices for such specialized courses. I know from my own experience in this other state. The quality of programming was not good and in 20 years, it never improved. (BTW, it was not California). 3. Most WA attorneys are specializing and we need much CLE time as possible just to keep our skills current with in our specialty area. This will serve the public better. So please don't tamper with a successful cle system. If you do, this will only be the beginning of turning success into failure.

None	Licensed legal professional (Lawyer, LLLT, LPO)	I oppose this proposed change. I don't know if you consulted new or younger attorneys, but mandating more CLEs (on topics unrelated to the practice of law) in this economic climate is not prudent. You should be focused on relieving strain on your members; not pushing something that should be taught in law school, on the job, or through common sense into required CLE categories. Many employers already have their own document security training - especially government lawyers - specific to their office/firm. It's not something evenly applicable to all attorneys, and, as such, should be included with the ethics CLEs, not it's own requirement. I also have concerns that your mental health requirement will not provide for sufficient accommodations for those that have religious objection to counseling, psychology, and "mental health" treatments. I would also, at the very least, recommend changing to "behavior health" because the medical field, and society, is moving away from the potentially loaded term "mental." I also do not understand the need to collect the names of individuals that provide responses. If you want honest feedback, this is not the way to go about doing it.
Daniel J Roach	Licensed legal professional (Lawyer, LLLT, LPO)	Why doesn't the WSBA let practicing lawyers determine what we need to know to be of best service to our clientele?
Felicia	Licensed legal professional (Lawyer, LLLT, LPO)	We already have to meet ethics categories, it is just adding more complication to getting those credits. If you are going to add this, providing free CLE's on this subject would be very helpful. It's already expensive and time consuming to do all the CLEs required and keep up on trainings for our specific profession, which we often end up doing more than 15 credits per year due to this. Then to add on more ethics which probably wouldn't be covered in our standard CLE's would be difficult.
Thomas R Lavallee	Licensed legal professional (Lawyer, LLLT, LPO)	
Christiana Muoneke	Licensed legal professional (Lawyer, LLLT, LPO)	The proposal seems to unnecessarily complicate CLE reporting requirements, with benefits likely accruing only to CLE providers.

Sara Anderson	Licensed legal professional (Lawyer, LLLT, LPO)	While I appreciate the intent behind this proposal is to assist with ensuring client security in an ever more technology-heavy environment + to address mental health, which are both great things, the requirement that every lawyer, every reporting period, obtain such specific requirements seems overbearing. Some lawyers use very little technology still, and it would be irrelevant to their practice to be forced to take a "technology security ethics" course. It is unclear whether the mental health applies to clientele or lawyers, but either way it seems forceful to require it--many lawyers have almost no contact with clientele, and it seems like those who are not seeking out courses related to mental health would not need it for themselves. All in all, I think that encouraging individuals for whom it is relevant to obtain these specific designations of credits could be useful, but requiring it feels forceful, overbearing, controlling, and generally unnecessary. In weighing the costs/benefits, I think it is simply making it more difficult for lawyers to get their CLE rather than truly adding to the education and abilities of practicing attorneys.
Christien Drakeley	Licensed legal professional (Lawyer, LLLT, LPO)	Most of the classes of this ilk are woefully juvenile and taught by people who haven't a clue about the practice of law.
Kerri Davis	Licensed legal professional (Lawyer, LLLT, LPO)	It is already impossible to determine which CLEs count toward specific requirements when they are not offered by the WSBA. With these rules, I can't tell if a CLE that is sponsored by my company, or in my field, would count before I sign up for and pay for it. How are we to determine which non-WSBA CLEs, events, conferences, etc would satisfy these requirements?
Ellen Jackson	Licensed legal professional (Lawyer, LLLT, LPO)	We already have too many specific "this many of that type" CLE credits. Getting more specific makes those of us who have to find seminars/conferences/classes that both meet the requirements AND are somewhat relevant to our actual practices go absolutely bonkers.
Heidi Gassman	Licensed legal professional (Lawyer, LLLT, LPO)	I value ethics CLEs which cover diversity, equity, and inclusion, even though the requirement for these specialized credits is a bit of burden to me (I have to seek out specialty CLEs, and often pay for them). Adding two more subcategories, "technology security" and "mental health", however, is just too much. Will there be enough CLE providers for me to find an accredited CLE? Will it cost me additional money (I'm not a wealthy practitioner)? I also don't think that requiring these additional two ethics credits will change bad practices of bad attorneys. Please don't add these requirements to my mandatory CLE minimums.
Ann Wilson	Licensed legal professional (Lawyer, LLLT, LPO)	While I believe that offerings in the suggested categories would be helpful, we don't need more mandatory categories.
Lindsey Golden	Licensed legal professional (Lawyer, LLLT, LPO)	Amendment takes away flexibility in choosing continuing education courses most relevant to a lawyer's career.
Natalie Hocken	Licensed legal professional (Lawyer, LLLT, LPO)	Legislating this is not necessary or welcome. Include these options as part of the broader general ethics offerings, but adding additional requirements targeted on technology and mental health does not seem necessary.

Lee Smith	Licensed legal professional (Lawyer, LLLT, LPO)	I am against segmenting professional ethics CLE into ever increasing checkbox categories. I believe that we should teach and emphasize basic ethics principles applicable across all disciplines. Quite frankly, if we can successfully teach lawyers to think about the fundamentals of ethics in everything that they do, the practice of law would be 10x better than teaching ethics as a CLE checkbox 'specialty'.
Sanya Hill Maxion	Licensed legal professional (Lawyer, LLLT, LPO)	I believe that we lawyers are required to take too many CLE credits already and the CLE classes are already too expensive. Instead of requiring us to now that 4 separate categories of ethics CLEs we should be able to only take 2 and we should be able to take the 2 categories that best align with our practice specialties and experiences. Enough is enough!
Mallory Sullivan	Licensed legal professional (Lawyer, LLLT, LPO)	I support the additional topic areas but they should replace, not add to, the existing requirements. As a government attorney, the existing requirements are already too expensive. While free CLE options exists to rely on them means wasted time on material that is not relevant to my work. My agency provides ample resources on these topics, but they would not qualify as for CLEs meaning I would need to pay for these additional credits even though I am already receiving this information.
Jeffrey C. Mirsepasy	Licensed legal professional (Lawyer, LLLT, LPO)	Leave well enough alone.
Patrick J Cronin	Licensed legal professional (Lawyer, LLLT, LPO)	I am not in favor of changing the requirements by additional adding ethics credits.
Alex Baehr	Licensed legal professional (Lawyer, LLLT, LPO)	
Wes Larsen	Licensed legal professional (Lawyer, LLLT, LPO)	Attorneys are grown-ups. We should be allowed to choose what types of CLEs will benefit our lives and specific practices ourselves. If an attorney feels they need technology security and/or mental health CLEs, I expect they'll make the decision to take those courses of their own volition. No need to force an additional curriculum on us.
Nancy Rogers	Licensed legal professional (Lawyer, LLLT, LPO)	Keep it simple. More categories for different types of credits just makes it more difficult to acquire and track credits. This is additional bureaucracy with no benefit.
john Black	Licensed legal professional (Lawyer, LLLT, LPO)	It will be difficult to obtain these specific credits. I am also not in favor of micro managing the individual lawyers. I would be in favor of the WSBA encouraging the CLE providers of Ethics to add the subject matters to future seminars but not require the lawyers to search out and find specific credits. Moreover, simply checking the box that you attended a mental health seminar, for example, is not going to address or even begin to solve mental health issues in the profession. You might as well require mental health check ups for each lawyer. There has to be another way.
Geraldine Griffin	Licensed legal professional (Lawyer, LLLT, LPO)	I have been a member of the Massachusetts bar for much longer than the WA state bar (since 1998). The Massachusetts Board of Bar Overseers does not require CLEs and yet it manages to maintain a well respected membership of lawyers. The WA state bar CLE requirements already seems excessive without adding further hoops through which lawyers must jump.
Nancy Bradburn-Johnson	Licensed legal professional (Lawyer, LLLT, LPO)	

Timothy Meehan	Licensed legal professional (Lawyer, LLLT, LPO)	
Marcus Cannon	Licensed legal professional (Lawyer, LLLT, LPO)	I agree with this in concept, but am not in favor of the proposed. One hour is inadequate relative to the need for these requirements. 3 hours per topic would equate to an hour per year for each, and would encourage attorneys to spend more time addressing these important issues.
Sean Brown	Licensed legal professional (Lawyer, LLLT, LPO)	
Erika Nijenhuis	Licensed legal professional (Lawyer, LLLT, LPO)	Different legal professionals encounter different ethics issues in their practice. If these two new areas are considered useful, they should become options for satisfying the legal ethics requirements rather than mandates, so that professionals can select the ethics courses most relevant to the practice. The suggested amendment just makes satisfying required CLE requirements more burdensome without targeting the burdens to the appropriate subset of the legal professional population.
William Humphries	Licensed legal professional (Lawyer, LLLT, LPO)	Not in favor
Kevan Montoya	Licensed legal professional (Lawyer, LLLT, LPO)	We have too many rules that are specific to too many subtopics. If someone thinks they need help in these areas, they can take a CLE in them. Otherwise, let us take general ethics credits.
Ambur Hoffmann	Licensed legal professional (Lawyer, LLLT, LPO)	
Megan	Licensed legal professional (Lawyer, LLLT, LPO)	
Laura Poellet	Licensed legal professional (Lawyer, LLLT, LPO)	
Gary A Western	Licensed legal professional (Lawyer, LLLT, LPO)	
Ben Edelman	Licensed legal professional (Lawyer, LLLT, LPO)	Lawyers can determine for themselves what training they need and what is appropriate for their practice.
Arthur Quigley	Licensed legal professional (Lawyer, LLLT, LPO)	This is a terrible idea. I already have great difficulty obtaining ethics credits. Now, I am being asked to add two more. We already have an incentive to have secure computers, etc. No one wants to get hacked. Out of self-interest, lawyers are motivated enough to have technology security. The medical health ethics requirement is a partial doubling-down on the bias ethics requirement. Just stop. I think these proposals would be over-regulation. You could give us a choice to take a bias, security, or mental health credit, but don't add more specialized ethics credits and don't add more total ethics credits. This is TOO MUCH. Leave well enough alone.
Nicole D Andrews	Licensed legal professional (Lawyer, LLLT, LPO)	
Jason Moscowitz	Licensed legal professional (Lawyer, LLLT, LPO)	This amendment validates the concerns of all attorneys who noted the likelihood of additional expansion to the MCLE requirements when the previous subject-matter delineation to the ethics credits occurred. The slippery slope simply is not a fallacy here and however valuable the subject matter in question may be, requiring more and more specific divisions of ethics credits should be opposed.
Deborah Flynn	Licensed legal professional (Lawyer, LLLT, LPO)	There are more than enough requirements and burdens on practitioners. Enough is enough.

James Oberholtzer	Licensed legal professional (Lawyer, LLLT, LPO)	Just stop. You are wasting our time on things like these two additional CLEs. They totally miss the point. And they use the coercive power of the Bar to ill effect. Offer the courses, the same people will take them and have their benefits. Make us take them and we will strive to minimize them. Is there an ongoing political dialogue that these relate to? Its the only reason I can imagine for doing this. By proposing mandatory courses too often you undercut your efforts when you really have a good reason. This may feel like the best of the bad choices; but, it is actually still a bad choice. Don't do it!
Michael Levy	Licensed legal professional (Lawyer, LLLT, LPO)	If you wish to make CLE providers money you are succeeding. This is overkill to our profession. You will have almost no rural lawyers left because of making it overly difficult to practice law. While well intentioned, there is no logical reason to put the onerous requirement on the backs of the legal profession. Going to some seminar for this topic will not give me or most attorneys enough knowledge to even deal with the subject in an intelligent manner. This is why we hire IT professionals and buy anti virus everything software to safeguard information. It makes very little progress for the immense cost involved
Sonia Pitts	Licensed legal professional (Lawyer, LLLT, LPO)	Getting ethics credits is already a challenge. This represents a significant increase in the ethics requirements and adds complexity by creating 4 distinct categories of ethics. It is common practice for equity, inclusion, privacy, data security and mental health (among other things) to be addressed holistically by employers; adding formal, professional ethics continuing education requirements seems unnecessary,
ROCKIE HANSEN	Licensed legal professional (Lawyer, LLLT, LPO)	Although the topic of technology security is important, I believe it is not required for all lawyers in the same way that we don't require training on how to keep the books or manage staff. It is more appropriate for a general ethics credit that is available to those who would utilize and benefit from the training. The mental health training is beyond ensuring ethical conduct and I question why it would be required every licensing period. Again, it could be available as a general ethics credit for those who are particularly interested.
Brad Goergen	Licensed legal professional (Lawyer, LLLT, LPO)	
Christie Fix	Licensed legal professional (Lawyer, LLLT, LPO)	It's already difficult and expensive to acquire credits when one is not in private practice -- making more specific requirements will make it that much more difficult.
Katrine de Raoulx	Licensed legal professional (Lawyer, LLLT, LPO)	While continuing legal education and awareness is crucial to the development of attorneys, adding additional responsibilities at this time is not the answer. If the addition of these two Ethics categories were accepted, then lower the requirements in other categories so the total number of required credits remains the same.
Michael white	Licensed legal professional (Lawyer, LLLT, LPO)	I'm not sure what the equity ethics would be but my preference would be to have mandatory CLE stick to skills and knowledge helpful to helping clients with legal problems.
James Miller	Inactive member	

Jennifer Tengono	Licensed legal professional (Lawyer, LLLT, LPO)	Before requiring attorneys and other legal professionals to take technology security ethics courses, please require courts to have electronic record keeping systems. Makes no sense to require legal professionals to adhere to certain ethical trainings when the courts do not have the technology to accept electronic documents or to adequately search through cases online (i.e., Asotin County). These courses should remain optional and the WSBA should make such classes more widely available before they become a requirement, especially since the WSBA often charges hundreds of dollars for their CLEs and offer very few free courses.
Rebecca Dombcik	Licensed legal professional (Lawyer, LLLT, LPO)	It should be an included option, but should not be mandatory or added in addition to CLEs we have to complete at all. We should have discretion to choose it, if applicable to are practice.
Kelly Wood	Licensed legal professional (Lawyer, LLLT, LPO)	
Andrew Phillips	Licensed legal professional (Lawyer, LLLT, LPO)	There are enough rules and regulations providing for the resolution with penalties for negligence in data security and to protect the rights of the mentally impaired. We don't need to clutter our business with separate requirements.
Tricia Johnson	Licensed legal professional (Lawyer, LLLT, LPO)	This is combersome and not necessary for the practice of law.
Mark Hood	Licensed legal professional (Lawyer, LLLT, LPO)	It seems to me that legal ethics is evolving, and while the additional subject areas may be important it also seems that some practitioners will never encounter the areas in which the bar wishes to expand CLE credit hours. Let each individual practitioner determine if their practice requires the proposed mandated areas. Do not force upon the entire bar areas of ethics that may not apply to an individual attorney's practice.
Ron Kinsey	Licensed legal professional (Lawyer, LLLT, LPO)	This is way too specific; over the top; while of some general interest, as MCLE it's too "special interest." Give the proponents some space in the Bar New to air their concerns.
David Cromwell	Licensed legal professional (Lawyer, LLLT, LPO)	The proposed change to ethics continues a recent trend to require CLE that is not generally applicable to all attorneys. This places a particular burden on those of us who practice out of state. I have no issue with requiring more ethics credits if that is the direction the WSBA wants to go, but we should have the freedom to choose what CLE is most applicable to our practice. For instance, while the diversity and inclusion requirement sounds good in theory the CLE I downloaded to satisfy this requirement offered me nothing I could apply in my profession. Instead it was simply an exercise in checking a box. I received far more effective training as a federal employee.
Alexis Merritt	Licensed legal professional (Lawyer, LLLT, LPO)	I do not agree with adding more specific requirements and cost to continue our license each year. If you really want members to earn these credits, make them free as a lunchbox.
Kristi Weeks	Licensed legal professional (Lawyer, LLLT, LPO)	Ethics credits of any type are already extremely difficult to attain. They are not widely available and when they are, they are almost always for purchase as opposed to free or discounted. As a government attorney, I have to pay for my own CLEs. Adding these types of specific requirements means I am forced to pay a high fee for them out of my own pocket.

Sara Smith	Licensed legal professional (Lawyer, LLLT, LPO)	
Brian S. Boon	Licensed legal professional (Lawyer, LLLT, LPO)	I do not support adding additional MCLE requirements. In fact, I wish you would reduce them. In my opinion, MCLE is a waste of time for the vast majority of lawyers. Competent practicing lawyers already stay up to date in their fields. I subscribe to several patent and trademark law blogs which send me updates about developments in my practice every week, including summaries of, and links to, important precedential decisions at CAFC and SCOTUS that impact patents and trademarks. It would be malpractice not to stay up to date. There is quite literally nothing that MCLE courses have ever taught me about my field of practice that I didn't already know, and there is no reason for me to learn about other fields of practice because they're not relevant to me. Regarding ethics and professional responsibility, we learned what we needed to know in law school. If we have questions, we can do research, ask colleagues, or call an ethics hotline. The same is true of mental health and substance abuse issues. If I need help, I'll seek it out. I don't need to keep taking the same courses over and over again every year giving me generic advice and telling me that help is available if I need it. I already know that.
Gregory Pendleton	Licensed legal professional (Lawyer, LLLT, LPO)	
Kelli Schmidt	Licensed legal professional (Lawyer, LLLT, LPO)	While I appreciate that mental health and technology security issues are important, adding two more hours in two separate categories to track seems unnecessary and redundant of information available under existing requirements. For example, technology security is an issue that can be addressed under ethics rules MCLEs and mental health can be addressed under equity MCLEs.
Craig Mason	Licensed legal professional (Lawyer, LLLT, LPO)	I believe such CLE's should be developed and be available, but not required.
james johnston	Licensed legal professional (Lawyer, LLLT, LPO)	Unnecessary amendment
Corey Kleer-Larson	Licensed legal professional (Lawyer, LLLT, LPO)	While I believe that these areas have merit, I believe the increase is not one that is beneficial to the legal community. The interpretation of equity is already highly politically charged. Trying to increase the requirements and subdividing ethics into these categories will only serve to foster resentment toward the WSBA by forcing attorneys to undertake additional expense.
Shelley Ajax	Licensed legal professional (Lawyer, LLLT, LPO)	This is completely unnecessary and a waste of time and our money as attorneys. If you want to include those topics to meet specifications of general ethics or legal credits, then add them. But don't make them a new requirement for additional CLE's in those areas.
David Stevens	Licensed legal professional (Lawyer, LLLT, LPO)	As a former federal civil rights investigator, I find that requiring others to attend lectures on "equity" is counter productive.
Chris Anderson	Licensed legal professional (Lawyer, LLLT, LPO)	It is already difficult to get sufficient ethics credits. By specifying the types of ethics credits that are required, the suggested amendment will only serve to further narrow the opportunities to obtain the required credits. I am therefore opposed to the amendment. Thank you.

Rebeka	Licensed legal professional (Lawyer, LLLT, LPO)	Getting ethics credits is already a challenge, and this will only make it harder. If WSBA is going to implement this I suggest they need to ramp up the number and type of accessible CLEs offered.
James L Sorenson	Licensed legal professional (Lawyer, LLLT, LPO)	We have enough seminars and specific monthly webinars for attorneys that cover these topics and more. On ethics WSBA should push more civility and items like returning calls and e mails to fellow attorneys.
Robert Van Dorn	Licensed legal professional (Lawyer, LLLT, LPO)	Why not encourage professionals in IT and mental health to offer interesting and helpful courses like this, but then let lawyers choose whether or not to attend them?
Julianne Peter	Licensed legal professional (Lawyer, LLLT, LPO)	Really, more requirements??? Hours to acquire??? Not opposed to the specific ethics suggested, but opposed to BURDEN attorneys with even more hours to acquire to meet the MCLE requirement total.
Charles Cresson Wood	Licensed legal professional (Lawyer, LLLT, LPO)	This amendment increases the MCLE bookkeeping, internal records bureaucratic burden, and attendant cost, associated with continuing legal education. Lawyers are already required, by the ethics code, to maintain competence in the areas where they practice. This existing obligation includes knowledge and skill in the special areas of ethics addressed in this amendment. The amendment is thus duplicative and unduly specific, leading to unnecessary regulation, unnecessary bookkeeping, and unnecessary costs.
Diana Anderson	Licensed legal professional (Lawyer, LLLT, LPO)	Technology Security ethics? I maintain a low tech practice and don't feel this would be very useful in my practice. As for mental health ethics...shouldn't it be the responsibility of the attorney to decide whether this topic would be helpful to his/her practice and respond accordingly? I wasn't happy with the amendment requiring Equity credits either, but stayed quiet. It feels like the Bar Association is getting too 'heavy handed' with requiring particular topics for credit and displays a distinct lack of trust in practicing professionals to get the information they need for their case/practice.
Sonia Agee	Licensed legal professional (Lawyer, LLLT, LPO)	The increased requirements do not serve any purpose except to increase the burden on professionals who are already addressing these issues, and to create unnecessary costs. The MCLE courses approved in this area are rarely if ever helpful, and we pay premiums for these credits. The special interests involved with these areas need to consider the scope of practice of attorneys in general, not just specialized areas.

Robert D. Bohm	Licensed legal professional (Lawyer, LLLT, LPO)	The proposed amendments are going to make it extremely difficult for lawyers to obtain ethics CLE credits in these areas. In my 45 years of practice I have never seen any programs from any file provider that would satisfy these two requirements. I also do not see how they provide any significant improvement to ethical behavior on the part of lawyers. I do not think that problems with technology security are a significant problem for most lawyers as they do what they can to make sure that there systems are protected from spam, phishing, and other intrusions. Regarding mental health problems, the issue is not ethics, but rather any individual who was suffering from mental health problems recognizing that they need to deal with it as opposed to avoiding the issue.
Connie Smith	Licensed legal professional (Lawyer, LLLT, LPO)	Please do not make reporting any more complicated, complex, or make any new requirements. Consider simplifying the requirements. Thank you for providing the free Legal Lunchbox trainings. If you have certain topics for attorneys and you make information available there that goes a long way towards reaching attorneys. Consider making those presentations available on demand and encouraging participation but please don't add requirements or subdivide types of ethics.
Mark Wittow	Licensed legal professional (Lawyer, LLLT, LPO)	This is imposing requirements on how to be a thoughtful person as distinct from legal competence. Perhaps it's a good idea, but seems a bit outside the scope of professional regulation.
Jacqueline Becker	Licensed legal professional (Lawyer, LLLT, LPO)	This is getting far too complicated. Let Lawyers pick their own CLE's.
Janell Felsted	Licensed legal professional (Lawyer, LLLT, LPO)	Absolutely do not agree with this at all in any way shape or form
Denise Farr	Licensed legal professional (Lawyer, LLLT, LPO)	It is hard enough to meet the MCLE requirements; this adds unnecessary complexity
Cynthia Cartwright	Licensed legal professional (Lawyer, LLLT, LPO)	Cle courses are expensive, bar dues are expensive and I am not in favor of added expense with additional requirements. Also some attorneys will not find the subject matter useful.
Carol Burton	Licensed legal professional (Lawyer, LLLT, LPO)	I'm fine with the subject matters, but am not in favor of increasing the number of credits required. I get frustrated about assumptions made that it's not a financial hardship to earn credits. Not everyone works for a firm that pays for our CLE credits. Some of us are not as financially well off as others.
Douglas Shae	Licensed legal professional (Lawyer, LLLT, LPO)	I support more CLE's on those topics. However I do not think it is important to make them mandatory. I am a retired Government Attorney. I have a lot of training in both those topics through my job and through CLE's. Again, should be encouraged but not required. Doug
Stephen Funderburk	Licensed legal professional (Lawyer, LLLT, LPO)	Practicing attorneys need less requirements from their state licensing board, not more. I recently read that employees already suffer through two days of emails and meetings per week, and in another article that work requirements are impeding workers family and social time. Perhaps that doesn't answer your question, but I am not in favor of more requirements.

Margaret Niver McGann	Licensed legal professional (Lawyer, LLLT, LPO)	CLE is so hard to manage across multiple state bars. As long as you still offer parity with other state bars it is far less annoying. The more you require certain subjects not only the less relevant to my practice does the material become but the harder it is to coordinate with other state bars.
ryan	Licensed legal professional (Lawyer, LLLT, LPO)	"equity" is a political issue, and is virtually always presented as such. The WSBA should at least pretend to maintain some degree of political neutrality; something it has generally done poorly.
Jens Omdal	Licensed legal professional (Lawyer, LLLT, LPO)	While the intent of this amendment is clearly to encourage legal professionals to address mental health concerns; there are better alternatives that are already available to address this issue. Through the WSBA, legal professionals have access to therapists and mental health professionals. Also, collaborative programs (like mentoring) provide resources for attorneys to discuss and address stressors before they develop into pathologies. Respectively, adding a CLE requirement will not have the intended outcome. Instead, the already existing platforms should be advertised and participation should be strongly encouraged for those experiencing mental health conditions.
Eric Sachtjen	Licensed legal professional (Lawyer, LLLT, LPO)	Let's focus on lawyers learning the law.
Lisa E;;os	Licensed legal professional (Lawyer, LLLT, LPO)	
J. Powers	Licensed legal professional (Lawyer, LLLT, LPO)	This is too burdensome on the legal community.
paula plumer	Licensed legal professional (Lawyer, LLLT, LPO)	This is beyond our scope of expertise, and should be, but could be included under the umbrella of the general equity ethical training and obligations.
Joe Harris	Licensed legal professional (Lawyer, LLLT, LPO)	

Ken Masters	Licensed legal professional (Lawyer, LLLT, LPO)	Compartmentalizing ethics is generally a bad idea. The idea that there is such a thing as "Technology security ethics" (or "Equity ethics" or "mental health ethics") is not just nonsense (who purports to be an "expert" in such things?) but it is positively harmful. Ethics concerns rational justifications for moral judgments. Moral judgments are not, and cannot be, segregated into particular subject matters. If you understand how to make a moral judgment -- the subject that ethics studies and should instruct upon -- you should be able to make it in any context. Indeed, the single biggest failure of "legal ethics" (or "medical ethics" or whatever) is a tendency to suggest that "X ethics" is somehow distinct from ethics. That sort of thinking leads to "litigating" ethics -- seeing how close to some perceived "ethical boundary" you can get without crossing the line. There are no ethical boundaries: only moral judgments. It is unethical to think otherwise. Legal professionals need to learn how to make moral judgments (a/k/a doing the right thing). They do not need more instruction on how to litigate ethics in some particular subject area. Providing ethics training is a good thing. But purporting to subdivide ethics into various non-existent "categories" and then requiring 2 of these and one of those is counterproductive at best. Legal professionals are professionals: let us decide for ourselves how best to learn ethical principles in our own practice lives. Your misguided paternalism is unhelpful and unwonted.
Kathryn C. Comfort	Licensed legal professional (Lawyer, LLLT, LPO)	These are oddly specific requirements. What data shows that an hour of ethics in these areas will lead to some type of improvement in the practice of law? It also feels like it will be difficult to fulfill, and just require more time and money for the Bar to manage these requirements.
Roselyn Marcus	Licensed legal professional (Lawyer, LLLT, LPO)	It is getting quite onerous to ensure you take courses now in all these required areas. Where are the courses to take? If the Bar doesn't offer it, how can we comply? And I have not seen any evidence or support that justifies this additional burden being placed on licensed attorneys.
Chelsey Winchell	Licensed legal professional (Lawyer, LLLT, LPO)	If you're adding categories, I'd recommend reallocating those credits from other already existing categories.
Leyla Brammer	Licensed legal professional (Lawyer, LLLT, LPO)	
Will Li	Licensed legal professional (Lawyer, LLLT, LPO)	

Confidential	Licensed legal professional (Lawyer, LLLT, LPO)	I'm a licensed member of WA and three other bars. Have been practicing law for over 25 years. Am not in favor of the proposed additional MCLE requirements. Lawyers are professionals and should be treated as such. It is literally our job to stay abreast of legal developments in our practice areas and manage our law practices in a manner that is ethical and legally compliant. Adding additional specialty ethics credit requirements won't result in more ethical or competent lawyers, and it will only further enrich the very lucrative continuing education provider industry. Keeping my name confidential because I don't wish to find myself a target of a bar inquiry.
Carole S Fisher	Licensed legal professional (Lawyer, LLLT, LPO)	
Kennet Phillipson	Licensed legal professional (Lawyer, LLLT, LPO)	While the aim is noble, it simply makes things too complicated. Most of us get our ethics credits as part of full-day CLEs. This amendment will require most of us to seek out 4 separate ethics classes apart from our full-day CLEs. It is inconvenient. It is expensive. And the benefits of the specialized credits don't outweigh the inconvenience and the expense.
Jada Walker	Licensed legal professional (Lawyer, LLLT, LPO)	
Catherine Chaney	Licensed legal professional (Lawyer, LLLT, LPO)	It's more complicated than it needs to be. I don't understand why the change is needed.
Heather Griffith	Licensed legal professional (Lawyer, LLLT, LPO)	We already created two categories of ethics. It will be very confusing to have four. I would rather have an increase in the ethics requirements generally than this requirement for specific ethics classes.
Elizabeth McKenna	Licensed legal professional (Lawyer, LLLT, LPO)	
Sharon Ann Saito	Licensed legal professional (Lawyer, LLLT, LPO)	Compliance may be difficult if sufficient CLEs are not provided across the state on an on-going basis. Diversity CLEs should also be considered, with appropriate support to the membership, due to our historical and on-going issues of racism and disproportionality.
Barry Abbott	Licensed legal professional (Lawyer, LLLT, LPO)	This just adds more cost and will not result in anything significantly of value.
Jim Bledsoe	Licensed legal professional (Lawyer, LLLT, LPO)	The power to regulate is only surpassed by the power to refrain for regulating. How in the world have we existed as a state for 134 years without all this micro-managing. Amazing.
Judith Alber	Licensed legal professional (Lawyer, LLLT, LPO)	The CLE requirement is already challenging with the prior changes. What used to be simple and allowed for freedom to choose classes you are interested in, is becoming very difficult and stressful to complete. We need freedom to explore areas that are relevant and meaningful to each person. Please stop adding any more requirements.
Lynden Smithson	Licensed legal professional (Lawyer, LLLT, LPO)	
Robert G. Casey	Licensed legal professional (Lawyer, LLLT, LPO)	I think the proposed changes are too restrictive and unnecessary. The focus of the CLE requirements should be competence in the practice of law.
April King	Licensed legal professional (Lawyer, LLLT, LPO)	
Edward Younglove	Licensed legal professional (Lawyer, LLLT, LPO)	We employ technology experts to ensure confidentiality of our records and communication. Is there such a mental health crises impacting attorneys ethical conduct that we all need this training.

Rando B. Wick	Licensed legal professional (Lawyer, LLLT, LPO)	Washington's requirements are already complicated than the other state I am a member of, by far. In addition, as live CLEs become less available following Covid, these further requirements will be even tougher to meet rather than through online courses, which are, in my opinion, boring and often not focused on areas most important to my practice. My vote is to reject the suggested amendment/
Nicholas Snow	Licensed legal professional (Lawyer, LLLT, LPO)	
Audrey Ross	Licensed legal professional (Lawyer, LLLT, LPO)	When will the lunacy end? There are already too many categories of requirements and too many credits required. In addition, the added cost and time are burdensome.
Timera C. Drake	Licensed legal professional (Lawyer, LLLT, LPO)	I understand the importance of internet and data/technology security, which is why I leave it to the IT professionals to do it properly. I don't think an additional requirement for our annual CLE is needed in this area. While I firmly believe in mental health and think it might be valuable, it is ridiculously repetitive to those legal professionals who are aware of their mental health and are already doing a thorough and excellent job of managing it. The two areas, however, should be *options* for qualifying ethics credit annually. Add them to the CLE roster and provide ethics credits to people who voluntarily take the courses and see how it does. It could be a raving success all on its own, or a miserable failure.

Jeffrey S. Rasmussen	Licensed legal professional (Lawyer, LLLT, LPO)	I don't view the proposed new categories to be applicable to myself or to many members of the bar on a continuing basis. Re: the technology credit, I see that as an area of specific expertise that some attorneys need to know, but that most of us do not. In the firm I am in, that is handled by specific attorneys who spend a lot of time keeping up on changes, working with IT. They then impose limitations on what the rest of us are able to do, and other rules and protocols. I am required to defer to them, and do defer to their far superior knowledge on this complex area. Assuming they are doing their job well, this is one of the least difficult complex areas of practice for me, and one where a CLE would not be of benefit. For the mental health proposal, I think it a bit closer, but don't see it as something that should be required of all members of the bar. The attorney ethics issues can be difficult and complex, and handled by a specific subset of attorneys within a firm. The remainder of the issues that would fall within this seem to be more "self-improvement," not really attorney ethics. And many of us deal with mental health related issues as part of our subject matter, and requiring us to take CLES on basics regarding mental health, risk assessment, etc. would be a waste. More generally, there are a lot of areas in both subject matter and in attorney ethics which an attorney should know, but in general I think that should be left to the attorneys, based upon the wide variety of experiences and needs that hey have, to have discretion to figure out what would be most beneficial.
Mark Fowler	Licensed legal professional (Lawyer, LLLT, LPO)	CLE is only valuable when it is applicable to your practice area. We need to allow licensed professionals the ability to decide which courses are valuable for their particular practice.
Erika L. Yuen	Licensed legal professional (Lawyer, LLLT, LPO)	Do not increase the number of hours required - just change the allocation.
Kimberly Raphaeli	Licensed legal professional (Lawyer, LLLT, LPO)	Overly burdensome.
Howard Stambor	Licensed legal professional (Lawyer, LLLT, LPO)	Unnecessary. Just a windfall for CLE providers. Not useful for most lawyers.
Ralph Flick	Licensed legal professional (Lawyer, LLLT, LPO)	I don't think we should pick and choose sub-topics like this (or more of them than we already have).
Tana Joslin	Licensed legal professional (Lawyer, LLLT, LPO)	We need only to include these subcategories of ethics to count towards the existing ethics requirements. The bar membership seeks out variety in CLEs in what we complete.
Brian Masterson	Licensed legal professional (Lawyer, LLLT, LPO)	The Suggested Amendment further complicates the MCLE process without tangible evidence of the benefits to legal practitioners.

Rachel Buker	Licensed legal professional (Lawyer, LLLT, LPO)	Government attorneys should be exempted from MCLE requirements as California does. https://www.calbar.ca.gov/Attorneys/MCLE-CLE/Requirements/Attorney-Exemptions Washington's continually changing requirements are overly burdensome in time and expense, and I have chosen to maintain my active license elsewhere due to these issues.
Lori Holt	Licensed legal professional (Lawyer, LLLT, LPO)	
Michael Vander Sys	Licensed legal professional (Lawyer, LLLT, LPO)	This is a horrible idea and unnecessary for the majority of the bar. I believe attorneys should have the OPTION to choose to do this CLE, but not the requirement.
Vernon Finley	Licensed legal professional (Lawyer, LLLT, LPO)	I think the future requirements should not be changed. Perhaps the MCLE Board should seek to encourage CLE programs in these areas but not make them a separate requirement. Cyber Security, Mental Health, Equity, etc, are all vital programs but they can be incorporated into the existing framework. Maybe CLE programs like "Legal Lunchbox" in Washington State could be used to convey specific information for the separate categories under the existing requirements. I would favor the "carrot" instead of the "stick" approach.
Elizabeth Peterson	Licensed legal professional (Lawyer, LLLT, LPO)	
Elizabeth Bejarano	Licensed legal professional (Lawyer, LLLT, LPO)	The requirement of adding a Mental Health ethics requirement is based on surveys conducted by the ABA et al. and not a survey conducted within Washington state. It seems as though the bar could offer CLE courses that cover attorney Wellness (a participatory introduction to YOGA as a general ethics credit for free via zoom? I am fully in support of that), and make those courses eligible to satisfy the general ethics requirement so those who feel that such a course would be helpful to them could participate. Any CLE that the bar feels is important can be offered for free via zoom if you want to increase participation within the bar. But it does not seem appropriate to mandate a mental health CLE requirement discussing addictions and unhealthy ways of dealing with stress when it is not appropriate to the larger percentage of our bar. We already have tools such as the Lawyers Assistance Program to help those in need, and it is well publicized as an available resource. Technology ethics requirement? Why not just provide a platform for attorney email that provides security. Give attorney members of the bar a secure email hosting option other than Gmail, where the bar is maintaining a secure environment for us. Provide a reasonably priced Wi-fi hotspot hosting option that provides security for telephones that we can opt in and pay for with our dues. We are paying enough dues that the attorneys should get some more practical benefits and assistance for their practice other than more educational requirements. Offer us solutions rather than mandated credits. Again, CLE's in technology could be offered for satisfaction of General Ethics credits, and can be offered for free and over zoom to attract participation.

Madeleine	Licensed legal professional (Lawyer, LLLT, LPO)	Look, I'm not against lawyers being as highly educated as possible. But lacking a system for CLEs in which one doesn't have to be employed by a firm able to finance their CLEs in order to complete these requirements will make the practice of law just a bit less accessible. And it's already pretty inaccessible.
frederick a kasaeburg	Licensed legal professional (Lawyer, LLLT, LPO)	stop the social engineering and stick to matters of the law.
Beau Robey	Licensed legal professional (Lawyer, LLLT, LPO)	
Nathan	Licensed legal professional (Lawyer, LLLT, LPO)	Not in favor. Stop creating additional hurdles for members of the profession to remain in good standing.
William V. Hammer	Licensed legal professional (Lawyer, LLLT, LPO)	I think the bar is getting too far into the weeds and starting to micro manage in this area. If I work in the mental health law arena, then it would behoove me to take such a class. I disagree with mandating a class in each of the sub-ethics areas. I am held to account for continuing legal education. It should be left to me to decide which subjects best suit the needs of my practice.
Greg Raburn	Licensed legal professional (Lawyer, LLLT, LPO)	Do not add a new CLE credit requirement without decreasing a CLE credit requirement elsewhere.
Elen Wetzel	Licensed legal professional (Lawyer, LLLT, LPO)	Different licensed professionals have different needs for ethics training. Proscribing specific types of required ethics training limits the professional's ability to tailor the training to their needs and potentially increases the professional's time & cost burden for meeting CLE needs/requirements.
Prefer to remain anonymous	Licensed legal professional (Lawyer, LLLT, LPO)	

M. Jeffery Kallis	Licensed legal professional (Lawyer, LLLT, LPO)	First, Washington requires more CLE credits that most states. There has been no showing that those licensed in Washington have greater professional training problems, knowledge deficits or ethical defects than attorneys licensed in other states with lower CLE requirements. The addition of these specific topics has not been shown to address a demonstrable failure in the current CLE requirements knowledge base. Adding more credits in specialized ethical and technology topics simple creates a greater burden on the members, and takes away their ability to select those CLE topics that the members have determined would benefit them, and their clients the most. However, the Board itself states that "These are serious topics that can greatly impact a licensed legal professional's competency to practice law and, if ignored, COULD result in serious consequences." The Board does not say that if these topic are ignored they WILL result in serious consequences, nor does it even indicate what the consequences could be or that they have even been shown to even exist. If the Board feels that these topics are crucial to the Washington attorney's knowledge base, and must be added, then the board should establish a detailed cost benefit analysis indicating which members of the bar demonstrate a need for such remedial training and how the need for training manifests itself so that effective and efficient programs can be developed. Moving chairs on the Titanic will not prevent disaster, only research and planning will provide effective solutions to real problems. Second, should there be data that can reliably forecast emerging ethical and technological short comings in the Washington State Legal Communities ethical behavior, and ability to do its jobs, then very specific and highly detailed course outlines need to be developed so that the members can assess whether the proposed topic(s)

Robert Carlson	Licensed legal professional (Lawyer, LLLT, LPO)	I cannot support this Suggested Amendment to the MCLE requirements because in my view there is no national consensus on the standards that ought to be applied to lawyer conduct in the “ethics” of equity, mental health, or technology security. Contrast that fact with the traditional ethics requirement that focuses on the Rules of Professional Conduct: those rules have been a national standard since they were adopted by the ABA in 1983, and every US jurisdiction follows them. The Rules and comments to the Rules are the subject of thousands of judicial decisions, ABA formal opinions, law review articles and similar documents such that they are amenable to study by law students and testing by bar examiners to an objective standard. The subjects of equity, mental health and technology security are not subject to this kind of objective standard, instead they are highly subjective concepts without a universal supporting consensus. So while these are appropriate topics for general CLE programs that lawyers may choose to attend, in my view a mandatory, subjective teaching on these topics should not be a condition of the continued right to practice law. If, in the future, a national consensus emerges on the standards that lawyers should be held to in one or more of these areas, I would support the WSBA imposing a mandatory education requirement. But at present I oppose the Suggested Amendment.
Andrew Leon	Licensed legal professional (Lawyer, LLLT, LPO)	
Kimberly Frinell	Licensed legal professional (Lawyer, LLLT, LPO)	It is already cumbersome to find courses in multiple subjects and to add more would just increase this difficulty and likely the cost of MCLE credits.
Bruce	Licensed legal professional (Lawyer, LLLT, LPO)	
Allan A Bonney	Licensed legal professional (Lawyer, LLLT, LPO)	Without defining terms such as "equity ethics" and "mental health ethics" and considering that the voting options were "all or none," I cannot make an informed choice about "all.". I would rather see the Board concerned about substance abuse among legal professionals, including signs, symptoms, and treatment options.
Don McGowan	Licensed legal professional (Lawyer, LLLT, LPO)	There is no benefit gained by subject-specific CLE requirements. They just provide lock-in for companies that charge for CLEs. The people whom you hope to target with these requirements don't learn anything from them. The people who don't need them just find them annoying. Please don't do this. It doesn't work, but it feels like it should. Don't chase a feeling.

		suggested categories make little sense to me. The ethics rules promulgated by the Court are what ethics education should be about. There is plenty of room there for refreshment and contemplation relevant to legal practice. If it is considered desirable for lawyers to attend philosophical courses where diversity, technology or other issues are discussed that could be a part of the general requirement not pushed into ethics which needs to focus on familiarity and compliance with court rules As an example at the recent ABA meeting here I attended an interesting cle discussing the foundation theories of ethical conduct vis utilitarianism etc they then discussed various some specific rules and what theory was embodied specific situations etc lively debate followed. Far more relevant than most I have attended. Ethical behavior usually does not follow black letter but grey situations. I personally don't think lawyers need to attend classes on equity or anything else outside of compliance with RPC as part of an ethics requirement. As noted if it is considered desirable by the Supreme Court of WA that a lawyer should attend or be briefed on these subjects to adequately practice law then a specific requirement should be so established with a specific course on that. Another approach could be sone suggested lectures and encouragement to attend. Legal practice today is much more complex t than when I was admitted. Practice then was more relaxed. However the same issues arise now as then: the most common being cheating a client, using trust funds, poor communication, inadequate representation.
Bruce But hrr	Licensed legal professional (Lawyer, LLLT, LPO)	
Liz Douglass	Licensed legal professional (Lawyer, LLLT, LPO)	
Krystian Koper	Licensed legal professional (Lawyer, LLLT, LPO)	The total CLE obligations in Washington state are onerous. There are numerous other states, e.g. Massachusetts, which have zero CLE obligations. Ratcheting more CLE obligations on busy Washington lawyers is not helpful. I'm fine to include additional Ethics credit requirements PROVIDED the total number of credits required is substantially lessened.
Cara Wallace	Licensed legal professional (Lawyer, LLLT, LPO)	
Alex Koretz	Licensed legal professional (Lawyer, LLLT, LPO)	
Cherise Gaffney	Licensed legal professional (Lawyer, LLLT, LPO)	This proposal would overcomplicate WSBA's ethics requirements. These are important topics, but WSBA's effort would be better spent developing free CLEs on these topics and making them easily accessible to members rather than mandating additional or different CLE requirements.
Abraham L. Rocha	Licensed legal professional (Lawyer, LLLT, LPO)	I'm not sure it needs to be mandatory to cover these topics. We should have the option to take these kinds of trainings and not be forced to take them.

Amy Totten	Law Student	I'd rather recommend education on those topics instead of mandating it. Finding specific topic CLE gets expensive, especially when you have a variety of topics to cover for multiple states.
Kyle Perkins	Licensed legal professional (Lawyer, LLLT, LPO)	No need to over complicate the CLE requirements. Enough already.
Clinton Lipscomb	Licensed legal professional (Lawyer, LLLT, LPO)	
Deborah A. Bianco	Licensed legal professional (Lawyer, LLLT, LPO)	The demands on lawyers are already great. Requiring additional hours of CLE credits that may have no bearing whatsoever on an attorney's practice area is expecting too much in the way of expenditure of both time and money.
Thomas Ledgerwood	Licensed legal professional (Lawyer, LLLT, LPO)	Ethics credits are already a challenge to fulfill without having specific categories of ethics credits needed.
Dawn Wolff	Licensed legal professional (Lawyer, LLLT, LPO)	While I strongly believe in ethics education, I also think you are making it too complex and too expensive for people to be able to get their necessary MCLE credits. Just one or two companies will be qualified to offer these specialized CLE credits, and they can then charge anything they want, and people will have no choice but to take the class or risk their licensure. Good concept, but exeuction in reality is problematic.
Mark Bardwell	Licensed legal professional (Lawyer, LLLT, LPO)	I'm skeptical of required trainings. I feel they generally are not needed and largely come at the expense of other opportunities that would be more valuable.
Patricia Petersen	Licensed legal professional (Lawyer, LLLT, LPO)	I do not believe these extra requirements rise to the level of the other existing ethics requirements. The information provided in these other proposed areas can be obtained elsewhere and without being mandated.
Julia Kyte	Licensed legal professional (Lawyer, LLLT, LPO)	
Yvonne Kinoshita Ward	Licensed legal professional (Lawyer, LLLT, LPO)	Is there a need for this, i.e., an identified, persistent trend of attorneys needed education in these areas? If not, then o. And if there are indications, offer free CLES on the topic. But this burden should not be placed on all attorneys due to perceived deficiencies in a few.
John Moore	Licensed legal professional (Lawyer, LLLT, LPO)	
Steve Bulzomi	Licensed legal professional (Lawyer, LLLT, LPO)	
Jessica Webb	Licensed legal professional (Lawyer, LLLT, LPO)	
John H Brolin	Licensed legal professional (Lawyer, LLLT, LPO)	It shouldn't be mandatory. It's hard enough and expensive enough to find qualifying WSBA CLEs now without adding in new specialized CLE mandates.
Erin Battersby	Licensed legal professional (Lawyer, LLLT, LPO)	I am not in favour of ay rule changes that would make fulfilling CLE requirements more cumbersome. Also, I think as professionals we can direct or own continuing education toward matters pertinent to our practice. In my case, both of the suggestions would be of interest but, I would not want to presuppose that these would fulfill the needs of others.

Paul R. Cressman, Jr.	Licensed legal professional (Lawyer, LLLT, LPO)	The proposed amendment is not necessary and is over regulation of the practice of law. Maintain the present categories of legal ethics and require all lawyers to maintain the current CLE requirements in all areas. In my long experience in the practice of law, 46 years and counting, where lawyers fall short is in their knowledge of the law, both case law and statutory, and that leads to problems for their clients and their clients' adversaries, as well as the lawyer himself of herself. More attention should be paid to those areas. The practice of law is becoming more and more complex, and lawyers need to keep up to date in their respective practice areas. Adding more required CLE ethics requirements will only take away from more other necessary areas that lawyers need.
George Bowden	Licensed legal professional (Lawyer, LLLT, LPO)	
Nora Schultz	Licensed legal professional (Lawyer, LLLT, LPO)	Ethics credits are difficult enough to get for attorneys who don't practice at big law firms. Please don't make this any more difficult or expensive than it already is.
Andrea Blander	Licensed legal professional (Lawyer, LLLT, LPO)	
Vicki Parker	Licensed legal professional (Lawyer, LLLT, LPO)	Honestly, THE reason CLEs were required was to increase the likelihood that attorneys would continue to grow in their knowledge of the LAW particularly in their area or areas of practice. I am certain this is well-meant but this proposed expansion is a sad expression that attorneys know nothing about life, technology, mental health, etc. It is treating attorneys as children. The perceived purpose is better met by offering such classes. If attorneys are not choosing them, it is an indication that the attorneys do not wish to spend money and time on those classes. Attorneys who choose them are interested in them. The precious time an attorney has it spent working for their clients. That is the job we actually have. An extra hour is an hour taken away and adds to the cost which must be charged to clients.
Michael Bissell	Licensed legal professional (Lawyer, LLLT, LPO)	We don't need the WSBA telling us what to do all the time. We can figure it out. The seems like an effort by the organization (like a lot of its actions) to create a purpose for itself.

Thomas M Smith	Licensed legal professional (Lawyer, LLLT, LPO)	or ethical or not ethical that more preaching from the pulpit is needed. No. I have been. Licensed since 1971. Now I am mostly retired doing the occasional mom and pop last will and testament and do no serious estate tax planning or complicated gifting .that I refer out. I do represent a collection company. I barely make enough money to pay the exorbitant WSB as annual licensing fees andalpractice insurance I have. NO need or desire to be preached to by young pups that do not have anything close to my fifty plus years of experience. The board of directors charge way too much for CLE presentations that focus too much on emotional funded issues. I don't need or want the board to try to help me feel good. I am fine thank you. What the board should do is waive all CLE requirements for those lawyers who have been licensed continuously for fifty years or more, waive all licensing fees except a modest administrative fee.of $75.00. Idaho annual licensing fee for elder lawyers makes sense. Common sense is .. something quite lacking in the WSBA But when the. Board gets so much pleasure spending someone else's money then the spending limit disappears and we lawyers get foo foo emotional funded CLEs on how to feel good . . You won't lower the licensing fee for lawyers with more than Fifty years of experience or waive waive the CLe requirements for we very experienced ethical lawyers who don't want to listen to the young preacher because you want more money . Go away. Thomas M Smith, Sandpoint Idaho.

Ehren Brav	Licensed legal professional (Lawyer, LLLT, LPO)	The MCLE requirements are already too complex and burdensome. Compliance should be getting easier (and cheaper), not harder. Rather than imposing additional regulatory overhead on practicing attorneys, the Board's goals would be better served by providing *free* CLE credit in the areas it would like to emphasize. Moreover, with all due respect to the MCLE Board's judgment of which areas deserve this special focus, I believe many practicing attorneys would not view at least some of these subjects as particularly relevant to their own practices. Again, a better alternative would be to simply offer free CLE presentations on these subjects and use the Board's powers of persuasion of why these are important, rather than its regulatory power, to accomplish its objectives. If it is correct, than attorneys will "vote with their feet" and in the process the Board would learn more about areas of most concern to the profession. Finally, I'm additionally concerned that the Board will not stop with these subjects - why not requirements pertaining to access to legal services for underserved populations, the ethical ramifications of social media, the ethical ramification of AI on our profession, the privilege and confidentiality ramifications of digital recordkeeping...I could go on. My point is that, although these subjects are no doubt important to many practicing attorneys, the attorneys themselves should decide what is relevant to their practices within the broad umbrella of professional ethics - not the MCLE Board. It seems arbitrary for the Board to select these particular subjects over the numerous others that, one could argue, are equally if not more important to our profession. Many thanks for your consideration.
Pamela A Okano	Licensed legal professional (Lawyer, LLLT, LPO)	I am generally a fairly liberal person, but the idea that WSBA feels it has to mandate what areas of ethics each attorney needs to take CLEs on doesn't sit well with me.
Jennifer Taylor	Licensed legal professional (Lawyer, LLLT, LPO)	Respectfully, I do not support this. Ethics credits are challenging enough to obtain as it is, and I am willing to guess most practitioners squeak by at reporting time. Offering a greater variety of topics, including mental health (or technology ethics), to choose from, within existing the Ethics CLE requirements makes more sense than mandating them as separate components. Thank you for the opportunity to weigh in.
June Campbell	Licensed legal professional (Lawyer, LLLT, LPO)	The Bar should trust lawyers to take the CLEs most relevant to their practice areas. Please don’t adopt this amendment.
Alyson Beck	Licensed legal professional (Lawyer, LLLT, LPO)	
Mark Clausen	Licensed legal professional (Lawyer, LLLT, LPO)	The current system is acceptable. Lawyers should be able to use their discretion concerning what CLEs to take within the current categories. For example, lawyers with no mental health issues should not be required to take CLEs for that issue instead of those that could be more relevant to the lawyer's practice.

Stephanie Martz	Licensed legal professional (Lawyer, LLLT, LPO)	Just stop. You are going too far. This isn't in the purview of the bar association. This is just one more reason for me to question why I have to belong to an ori do not believe in. It's bad enough that people like me who work for something other than a law firm have to pay out of pocket and struggle to find credits to meet your never ending add ons.
Jeanne Cushman	Licensed legal professional (Lawyer, LLLT, LPO)	
Janis Creim	Licensed legal professional (Lawyer, LLLT, LPO)	
Sean Butler	Licensed legal professional (Lawyer, LLLT, LPO)	I would be fine adding a new category of Ethics credits--and this one seems particularly pertinent in today's world, but it should NOT increase the number of CLE credits that we are required to earn each reporting period. I am also licensed in California, and Washington's required credits are already almost twice what I have to do for California. Adding more to that would be too much.
Justin Cheng	Licensed legal professional (Lawyer, LLLT, LPO)	Should not increase total credit requirement, but rather just change the type of credit needed.
Sunil Abraham	Licensed legal professional (Lawyer, LLLT, LPO)	
Ryan Leverone	Licensed legal professional (Lawyer, LLLT, LPO)	
Joseph Mohr	Licensed legal professional (Lawyer, LLLT, LPO)	
Tyler Winterton	Licensed legal professional (Lawyer, LLLT, LPO)	
John Dittman	Licensed legal professional (Lawyer, LLLT, LPO)	
Amy E. Jones	Licensed legal professional (Lawyer, LLLT, LPO)	I don't believe that requiring tech and mental health ethic CLE hours should be required. Those topics should be available to attorneys as CLE topics but by narrowing the ethic topics it will make it difficult for attorneys to find meaningful well run ethic CLEs timely and force attorneys to watch more recorded CLEs which are not as insightful as when a CLE is live, up to date and presented so that the attending attorney can ask questions. I think the pre-recorded CLE business is a money grab and this requirement feeds that.
David Goldfarb	Licensed legal professional (Lawyer, LLLT, LPO)	
Steven Abbott	Licensed legal professional (Lawyer, LLLT, LPO)	We already have enough stress with CLE requirements and I see little value in addressing these topics. If we do than the general number of CLE credit hours needs to be decreased and not increased if these topics are to be added. Thank you
Ariel Calmes	Licensed legal professional (Lawyer, LLLT, LPO)	CLE requirements are already difficult for many practitioners to achieve, and getting more and more expensive. Further requiring specialized types of CLE will impose additional financial burdens on already struggling attorneys. I would only support these requirements if the WSBA made them available to practitioners at no cost, the way other state bar associations provide sponsored CLE's at no or very low cost so that practitioners are able to meet their CLE requirements without great financial burden
Linda Waite	Licensed legal professional (Lawyer, LLLT, LPO)	
Jennifer Bucher	Licensed legal professional (Lawyer, LLLT, LPO)	
Bruce Gallagher	Licensed legal professional (Lawyer, LLLT, LPO)	

Kelly Mann	Licensed legal professional (Lawyer, LLLT, LPO)	It's fine to encourage attorneys to learn about these topics - perhaps by offering complimentary or low-cost CLEs on the topics. However, I believe requiring education on these specific topics for all attorneys is going too far. The Oregon State Bar does this; thus, the MCLE reporting process is cumbersome, and the requirements seem to change constantly. Don't follow Oregon in this practice, please.
daniel c jacobson	Licensed legal professional (Lawyer, LLLT, LPO)	
Clarissa Bolante	Licensed legal professional (Lawyer, LLLT, LPO)	Leave the total credit requirements for legal ethics as is and allow individuals to choose the categories. Finding ethics credits is already challenging much lease create requirements that will be hard to fulfill (unless WSBA plans on providing free CLEs for the new categories).
Charles Lee	Licensed legal professional (Lawyer, LLLT, LPO)	I am not in favor of expanding the mandatory ethics credits. I am also not in favor of creating four separate categories of ethics credits. Finding free CLE opportunities that fit within a busy schedule is already difficult as is. Expanding and creating more categories will become a cost and time burden that will be felt most by newer attorneys. These changes are not necessary as the suggested topics can be addressed as additional general credit courses for those that are interested.
Monica	Licensed legal professional (Lawyer, LLLT, LPO)	It is hard to find quality programming for specialized categories (I need to meet them in other states). I would prefer guidance be updated to cover these types of topics in general ethics credits
Ben Ingram	Licensed legal professional (Lawyer, LLLT, LPO)	Requiring these specific CLE categories would make compliance more complicated and potentially require attorneys to take CLE that are completely irrelevant to their practice. The choice should be left to the individual members. If you want to emphasize these topics then offer free CLE to incentivize people to voluntarily study them.
Amanda	Licensed legal professional (Lawyer, LLLT, LPO)	How soon before you tell me what colour suit I have to wear. Enough already. Not every lawyer needs all this crap.
Ron Phillips	Licensed legal professional (Lawyer, LLLT, LPO)	
Michele M. O'Loane	Licensed legal professional (Lawyer, LLLT, LPO)	Something has to give. I am a solo practitioner and adding the cost and lost revenue to meet EVEN MORE CLE credit requirements is so far over the line. Am I to understand from the email that LLT's also would have to complete "one credit of Technology Security Ethics and one credit of Mental Health Ethics each reporting period. The amendments would increase the total credit requirements in the area of legal ethics to eight credits, and create four distinct categories of legal ethics: (1) general ethics and professional responsibility; (2) equity ethics; (3) technology security ethics; and (4) mental health ethics?"

Gregory Lyle	Licensed legal professional (Lawyer, LLLT, LPO)	The word "equity" is too imprecise. It can and does mean different things to different people. The goal of equity is non-discrimination, so it should be replaced with "(8) Non-discrimination ethics, defined as subjects relating to eliminating discrimination and the mitigation of both implicit and explicit bias in the legal profession and the practice of law." The word equity implies to many people a goal of equal outcome and representation by race or class, when the goal should be to eliminate discrimination in all its subtle forms.
Scott Ashby	Licensed legal professional (Lawyer, LLLT, LPO)	Please stop adding required courses. We are professionals and we know better than any board what cle credits we need to best fulfill our professional responsibilities. Please stop.
Brett Shearer	Licensed legal professional (Lawyer, LLLT, LPO)	Members don't need any more specific requirements from WSBA. If anything, the requirements should be getting more generalized so members can customize their own learning as it applies to their practice. Specific requirements benefit some groups but harm others who may already have the knowledge base or for whom the new required topic category is more tangential to their practice/another topic would be much more beneficial.
Andrew Tien	Licensed legal professional (Lawyer, LLLT, LPO)	
Leila Edwards	Licensed legal professional (Lawyer, LLLT, LPO)	Regardless of the merit of a lawyer taking credits in any particular topic, I am strongly opposed to the WSBA further imposing ANY extra requirements for practice in this state. Attorneys who have been admitted to practice and are in compliance to practice should be free to determine, individually, how and where to spend money and time staying up to date and competent in practice areas. Each practitioner has her own financial, time, and interest limitations that should not be managed by the Bar Association. If the WSBA would like to OFFER FREE CLE's in areas of public interest or areas of particular import, please do so. Then whomever wishes to, may avail themselves of the content. If such a plan was initiated, I suggest there be a broad variety of free CLEs offered to appeal to a wide variety of practitioners.

Katherine A. Davis-Delaney	Licensed legal professional (Lawyer, LLLT, LPO)	This is an unbelievably bad idea. First of all, if we need more ethics credits -- for any number of reasons, none of which I agree with -- don't tell me what area of ethics I must know. Second, I can't deal with tech security. MEGO My Eyes Glaze Over. I have a lot of anxiety around tech and just about anybody who works in an office of any kind is inundated with this information. I got it doing temporary labor for Thurston County -- twice. Stoop labor and I got this training and I never went near a computer. Plus, paying for this deal. Come on. Of all the aggravating ideas, forcing us to get a CLE credit in mental health stuff takes the cake. Yes, it's good to learn about this. Yes, we want to be trauma-informed and compassionate. Why not have at least 2 free ethics "extra" credit for folks who want to know more. I took the WSBA recent Lawyer Training for Service as Judges Pro Tem for Counties & Municipalities March 17-18, 2023 at UW-Tacoma. The module on dealing with the mentally ill parties was extremely effective. The audio played an ordinary exchange in the courtroom and loud sound effects overlay the sound in the courtroom. We heard loud talking/shouting/harassing voices layered on top of the courtroom, mimicking the auditory hallucinations endured by mentally ill parties. It was scary & disturbing. Shout out to WSBA for presenting an unforgettable teachable moment.
Jacqueline E Marks	Licensed legal professional (Lawyer, LLLT, LPO)	If this is approved, then take away required credits in another area.
Lynne Buchanan	Licensed legal professional (Lawyer, LLLT, LPO)	If more credits are added then others should be subtracted.
Donald Kellman	Licensed legal professional (Lawyer, LLLT, LPO)	Unnecessary and without legitimate purpose
Arthur Quigley	Licensed legal professional (Lawyer, LLLT, LPO)	Earlier I responded. I would like to supplement my response. I stated that I have difficulty complying with the ethics requirement as it stands. Usually, I have all of my non-ethics credits as the three-year reporting period nears an end. Then, I have to scramble to meet the ethics creditrequirement. This proposal would only add to the scramble. First, it adds 2 more credits to be acquired. Then, the credits need to be on two subjects that are not widely offered around the country. I mostly attend out-of-state and foreign CLE's to meet earn my credits. Often these programs do not offer any ethics credits, let alone on the narrow subjects of technology security and mental health. My suggestion is that the ethics requirement be kept at 6 and that 1 of those credits discuss the elimination of bias OR technology security OR mental health issues. This choice will build awareness of these issues, without unduly burdening the bar with micromanaged regulation.
Nathan Rush	Licensed legal professional (Lawyer, LLLT, LPO)	Ethics credits are difficult enough to acquire during the reporting period. I am in an area of practice that does not implicate many ethics issues. So, I end ip taking ethics CLE in areas of law that are impertinent to my own practice. These proposed requirements appear to require even more specialized ethics training that will be inapplicable to many attorneys' practice areas. For these reasons I oppose.

John Geil	Licensed legal professional (Lawyer, LLLT, LPO)	The MCLE requirements are getting too complicated and detailed. As lawyers we already have a duty to keep up with the times with respect to the various competencies under the rules of professional responsibility. This proposed change would add an additional layer of unnecessary requirements given our self-policed duty as lawyers to be competent.
Mark Bucklin	Licensed legal professional (Lawyer, LLLT, LPO)	"Equity ethics, defined as subjects relating to equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law". Excessively vague and ill defined. What is "equity"? This seems to be an excuse for political indoctrination by progressive Bar members. What bias in particular are you trying to mitigate? The presumtion assumes a fact not in evidence since you fail to define what bias you believe needs mitigating.
Arthur Quigley	Licensed legal professional (Lawyer, LLLT, LPO)	I keep on thinking about this proposal. At least in my case, I keep on thinking about it because I do not think the proposal is good. Here is one more thought. Seminar organizers often try to put an ethics component in a seminar to entice attendance. If there are three specialized ethics requirements, organizers will be motivated to try to address all three requirements in a day-long or longer program. This would eat up time available to discuss the substantive law on the seminar subject. In an attempt to address narrow concerns, education on wider areas of the law will be limited. I think the bar should be wary of unintended consequences of this proposal.
Jim Patterson	Licensed legal professional (Lawyer, LLLT, LPO)	Piling on more targeted ethics requirements will not make lawyers better at their jobs. The equity ethics requirement has already shown itself to be at best an utter flop, but at worst an egregious political manipulation of our licensing process in WA. There is no need to double down on further targeted ethics classes and waste any more precious time (and money) of WA attorneys.
Mark Brubaker	Licensed legal professional (Lawyer, LLLT, LPO)	Trust professionals to choose CLE that is relevant to their practice.
Paul Benton	Licensed legal professional (Lawyer, LLLT, LPO)	The suggested amendment is not necessary and is onorously stringent for an issue that affects a super small minority of legal professionals. These issues should be addressed through disciplinary proceedings against members violating laws or ethics rules, which we are all aware of.

Mark J. Koslicki	Licensed legal professional (Lawyer, LLLT, LPO)	I oppose the proposed amendments to APR 11 to subdivide the requirements of the general ethics requirements to specifically require course subjects of both mental health ethics and technology security ethics. A proposal very similar to the current proposal was considered in 2019 and wisely rejected as a mandatory requirement. Rather the MCLE Board at that time recommended that those courses be made available. The "Preliminary Suggested Amendments to APR 11" dated May 5, 2023 says that "A Technology Security Ethics Credit Must be Mandatory Because Members Are Not Fulfilling Their Responsibilities of Competence and Diligence." Yet the MCLE Board only offers general population statistics rather than stating how many Washington State attorneys have or have not taken a course on the topic. I have taken such a course as it was offered for free from the WSBA. The additional subject of equity, inclusion and the mitigation of both implicit and explicit bias in the legal profession was added as a requirement in 2022. Now the board is recommending two more additional requirements (mental health ethics and technology security ethics). The MCLE Board is proposing too many sub-categories and should continue to offer courses on these topics rather than requiring more and more subjects be mandatory.
Dana Quam	Licensed legal professional (Lawyer, LLLT, LPO)	Please consider offering courses on those topics without imposing new obligations. The CLE obligations often do not provide substantive benefit to me in my work, and is just wasted time and money.
Scott Schwieger	Licensed legal professional (Lawyer, LLLT, LPO)	As a federal employee attorney advisor, it would be extremely burdensome to be required to take CLE classes offered essentially only in Washington especially given that I am in the Middle East. Also, diversity ethics has limited applicability to actual practice and likely inpinges on the free speech rights of attorneys. If you are going to mandate such CLE credits, at least wait to see if the US Supreme Court finds that the concept of diversity has been hijacked by political interests in their College admissions cases before them now. I also oppose mental health ethics mandates because of the similar burden of finding relevant classes / credits and its tenuous relationship with the actual practice of 90% of attorneys.

Robert Gudmundson	Licensed legal professional (Lawyer, LLLT, LPO)	The Bar Association is exceeding its mandate when it attempts to redefine legal ethics in terms of equity, technology security, and mental health. These topics go beyond the scope of the rules of professional conduct. While such inquiries are appropriate for lawyers to consider as matters of conscience, they are inappropriate for the court and bar association in their roles as legal regulators. This is because conscience and morality inform the law, the law does not inform conscience and morality. Conscience and morality are greater than the law. They are protected by the First Amendment. The Rules of Professional conduct protect clients' rights vis a vis their attorney and the courts' rights to candor and honesty. Let's not appoint ourselves as some sort of modern ecclesiastical court or super legislature by expanding the scope of legal ethics into a general morality code.
Marne	Licensed legal professional (Lawyer, LLLT, LPO)	No thank you. Fewer, not more and more complicated.
Ken Weil	Licensed legal professional (Lawyer, LLLT, LPO)	NO
David Solis	Licensed legal professional (Lawyer, LLLT, LPO)	I can't afford to be an attorney. I left the profession around seven years ago and have thought of jumping back in, but the list of WSBA requirements keeps growing and the CLE credits are super expensive. I understand the desire of the WSBA to do more, but ultimately theses type of actions just result in a less equitable profession and larger staffing at the WSBA.
Rachel McCall	Licensed legal professional (Lawyer, LLLT, LPO)	Ethics topics relating to technology and mental health are already very available in CLE courses and lawyers can choose to take those if they wish. I don't view mental health "ethics" as a legal issue that warrants lawyer education requirements. It is not unique to the law profession and there are other ways that lawyers can receive mental health education should they choose to. Ethics related to technology is also very much a part of the CLE offerings these days (and often the most interesting courses) so I don't see the need to mandate it specifically. The current amount of ethics CLE credits is already challenging to meet and adding an additional 2 credits for topics that aren't necessary doesn't seem worthwhile to an already overburdened workforce.
Michael Gusa	Licensed legal professional (Lawyer, LLLT, LPO)	No, no, a thousand times no. Anyone who thinks these would be useful can take them. The suggestion itself is bureaucracy run amok. Bureaucrats and would be bureaucrats always want to make what they view as a good idea as mandatory for all.
Cynthia Szeker	Licensed legal professional (Lawyer, LLLT, LPO)	Instead of adding to the amount of credits required you should make these additional categories as extra options available for obtaining ethics credits. Thank you.
Kelly Pankiewicz	Licensed legal professional (Lawyer, LLLT, LPO)	
Alton Gaskill	Licensed legal professional (Lawyer, LLLT, LPO)	
Lisa Johnson	Licensed legal professional (Lawyer, LLLT, LPO)	Stop adding regulatory requirements. People do not need to be so regulated at every single minute level, and that goes for MCLE credits, too. Categories beget categories.

James Smith	Licensed legal professional (Lawyer, LLLT, LPO)	The more specific and nuanced the WSBA makes earning credits in very specific categories, the more difficult it is for licensed attorneys to have full-day CLE conferences meet those specific requirements. This, in turn, requires licensed attorneys to have to seek rather expensive 1-2 hour CLEs just to meet those specific requirements. I am also licensed in California, a State that just added another category of "implicit bias and the promotion of bias-reducing strategies," on top of "competence issues," in addition to its general ethics requirements. These nuanced courses are harder to locate than general ethics credits, and are rarely covered in all-day training. I do not support this proposal.
Jeffrey Cox	Licensed legal professional (Lawyer, LLLT, LPO)	
M Colleen Barrett	Licensed legal professional (Lawyer, LLLT, LPO)	There are so many important legal ethics issues, by setting up sub-categories, it sets priorities for areas that may not be needed by folks who could benefit from other education. These areas are best taught in law school.
Inge Larish	Licensed legal professional (Lawyer, LLLT, LPO)	These additional requirements create unnecessary barriers to members of the bar as well as additional expenses for licensing fees that are already very high. It is not trivial to meet all these extra requirements especially since they are different than the requirements of for example California. This would be an unnecessary burden of members of the bar and in my opinion do not meaningfully add to the knowledge base of practitioners.
Neil Rust	Licensed legal professional (Lawyer, LLLT, LPO)	Respectfully, I believe the MCLE requirements are sufficiently burdensome as is, and do not need to be expanded. I have no objection to the proposed subjects being added, but if they are added the general law requirement should be correspondingly reduced hour for hour.
Saundra Richartz	Licensed legal professional (Lawyer, LLLT, LPO)	Its already impossible to find CLE's on substantive law. This change would simply lead to more CLE's that aren't teaching legal education. Ethics are important, but this goes too far.
Tuan Pham	Licensed legal professional (Lawyer, LLLT, LPO)	
Kathleen Doyle	Licensed legal professional (Lawyer, LLLT, LPO)	It is difficult to obtain ethics credits at the moment, without increasing the requirement. Moreover, these don't appear to be fundamental enough to require mandatory status.
Ilene Munk	Licensed legal professional (Lawyer, LLLT, LPO)	
George Kolin	Licensed legal professional (Lawyer, LLLT, LPO)	This is micro-management.
Kenneth Friedman	Licensed legal professional (Lawyer, LLLT, LPO)	Lawyers can be trusted to take the legal education classes that best suit them. I'd personally be in favor of removing all mandatory CLE requirements. I'm certainly opposed to increasing mandatory requirements in any way.

Margaret Manning	Licensed legal professional (Lawyer, LLLT, LPO)	to eight credits, NO, thank you. WHY THE INCREASE? WHAT EVIDENCE THAT IT IS NECESSARY? No correspondending decrease in substantive requirements? WHY? _____ and create four distinct categories of legal ethics: (1) general ethics and professional responsibility; (2) equity ethics; (3) technology security ethics; and (4) mental health ethics. This is, frankly, ridiculous. Legal ethics /professional responsibility are the ONLY topics that should be required. Have you data of a serious decline in legal ethics attributable to too few hours of CLE? If not, no increase is warranted. We are already expected to sit through hours of programming on discrimination, mental health, etc. Most of it topics covered for decades. .We are a two-person firm. Law office practice and LEGAL ethics are far more valuable to us. THE REST IS BURDENSOME AND THE NEED FOR IT NOT ESTABLISHED. Even law office and tech management should be rolled into the general category. EQUITY ETHICS? What IS that? Have you surveyed the membership on the perceived value of the EXISTING requirements? Much of it is a wasteful exercise. I do enjoy substantive law CLE in my specialty. The rest is already wasting my time. Adding more would be a mistake.
Stewart Mesher	Licensed legal professional (Lawyer, LLLT, LPO)	Hard enough to get ethics credits, further specialization on top of what is already required is too much
Glen Miller	Licensed legal professional (Lawyer, LLLT, LPO)	Military Attorney trying to keep up with the constant changes from WSBA CLE - it doesn't appear that WSBA is really aware that people are serving all over the world and don't have the ability or time to flex for all these new initiatives that are poor attempts at-one-size-fits-all. If you are interested in encouraging a particular CLE, offering free prerecord options will likely help get views.
Bonnie Dragotto	Licensed legal professional (Lawyer, LLLT, LPO)	The requirements for CLE are already extremely robust and exceed that of many other jurisdictions. If ethics credits need to be increased based on an increase in disciplinary actions or other evidence that the current requirements are inefficient, that data should be shared with the regulated community. If such data shows an increase is appropriate, recommend allowing flexibility in the type of ethics credits that can fulfill the requirement. Many jurisdictions and CLE offerings do not parse out specific topics within ethics making the requirement a challenge to fulfill.

Scott Morris	Licensed legal professional (Lawyer, LLLT, LPO)	It is difficult enough to obtain the necessary credits every 3 years. Leave this to decision to the individual atty's needs.
Gary E. Hood	Licensed legal professional (Lawyer, LLLT, LPO)	CLE should focus on ensuring practicing attorneys stay current on law and ethics. And it should allow each practitioner the flexibility to determine what areas and issues that practitioner needs to emphasize for that individual's circumstances. The further the WSBA continues to stray from that - such as requiring CLE credit for issues such as "mental health" on top of "equity" and the like, the further it strays from its appropriate role. While such myriad issues have their place, forcing an agenda on the profession through CLE is misguided.
Felicia Watson	Licensed legal professional (Lawyer, LLLT, LPO)	and mental health credits, but I do not believe these should be required under the Ethics category. With respect to the "technology security ethics" proposed requirement, I agree it is vitally important for attorneys to understand the risks data breaches and cyber-attacks can have on their businesses, and their clients. However, placing this under the "ethics" requirement severely limits what courses will comply. There are many courses (live and via webinar) focusing on cybersecurity risks and data breaches, that help inform legal practitioners of the risks, and reasonable steps to minimize those risks. But the proposal to designate this as an "ethics" course significantly limits choices for licensed legal professionals. Please remember that funds are limited for many licensed professions to take CLE courses which could have detrimental impact when a course on cybersecurity and/or data privacy (for example) does not qualify as "ethics" so the attorney would not select that because their training budget only covers so much, thereby missing out on potentially relevant information to their practice. The only way this proposal works is if the MCLE Board has courses developed and ready to go if the Suggested Amendment is approved. That said, for those practitioners who reside out of state, there will need to be an allowance for meeting the requirements via webinar replay (and not live). Moreover, while the MCLE Board report suggests that other states require some type of credits focused on technology and security, it does not appear that these requirements fall under the "ethics" category. Indeed, under the general professional requirements of diligence and competence, technology security easily falls within a general professional requirement. Why does the MCLE Board intend to place this under the "ethics" designation? For the Mental Health Ethics credit, I believe this too would be better placed under the general professional responsibility CLE requirements rather than be categorized under ethics. If the focus of the MCLE Board is to highlight the issues many legal professionals
Fiona de Kerckhove	Licensed legal professional (Lawyer, LLLT, LPO)	It is already very difficult to find qualifying ethics credits without further specifying the type of ethics credits that are required. The only way this could be feasible would be if the WSBA would provide opportunities to obtain these types of credits at no expense and virtually (not just in-person) multiple times a year.

Kimberly Kazda	Licensed legal professional (Lawyer, LLLT, LPO)	It may prove difficult for several attorneys to meet the requirement. WSBA is proposing that certain credits of ethics be categorized as certain types of ethics. When I receive my ethics credit through my employer they are classified as general ethics credit. Based on this new proposal, I will now have to seek out particular types of ethics credits, even though the ethics provided by my employer may cover the topics WSBA is seeking to require. Further, I am a government attorney who does not reside in Washington. I do not have the ability to attend ethics seminars presented by the WBSA unless these are remote. My employer has always provided a required ethics course which has fulfilled my ethics CLE requirements for the WSBA. My employer creates the required CLE courses to discuss matters that arise specific to our profession/employment. We often discuss these issues in ethics, but it is a general ethics course. These proposed courses should not be mandatory.
Marc Perez	Licensed legal professional (Lawyer, LLLT, LPO)	I find it increasingly more difficult to obtain my CLE credits at low cost. I'd be in favor of this amendment if the WSBA offered both credits at no cost to me.
Jennifer Farmer	Licensed legal professional (Lawyer, LLLT, LPO)	It's difficult to obtain CLE credits. Most attorneys take a variety of CLE credits. I would prefer that our number of CLE credits not be increased if this is added. If this is added, it can perhaps be added under the Ethics umbrella.
Kirsten Michelle Elliott Sinclair	Licensed legal professional (Lawyer, LLLT, LPO)	There are many things that are important for a lawyer to know and stay current on, and the WSBA should not be in the position of micromanaging all of these aspects by parsing out multiple types of CLEs. Moreover, for those attorneys like me who live out of state and depend on entities like Westlaw's Legal Ed Center for CLE credits, it will be increasingly hard if not impossible to figure out what courses count for so many different types of CLE credit requirements. Modern life and practice is increasingly complex and detailed; having yet more special things to track is actually quite burdensome and taxing. In my opinion, mandatory CLE topics should be limited to what is absolutely essential to the practice of law. Pleave it to the practitioner to determine what else applies to them in their practice and area of law.
Austin Michael Watkins	Licensed legal professional (Lawyer, LLLT, LPO)	As an attorney in federal practice if WSBA continues down this path of "unique" CLEs, I will resign from the WSBA. I am already overwhelmed by the amount of unique compliance requirements of multiple bars and professional accreditations. Stop with the nonsense already and allow your members to be competent attorneys capable of understanding technology and mental health. These CLEs are offensive to younger members (me included) of the bar who are generally well versed in technology and mental health issues.
Jennifer Cave	Licensed legal professional (Lawyer, LLLT, LPO)	Rather than mandating specific types of ethics credits, lawyers should be free to select the types of ethics credits most appropriate for their individual practices. These types of CLEs should be made available to lawyers to select from (and should count toward fulfilling the ethics requirement) but they should not be required to be completed as part of the license renewal process.
Frank Lin	Licensed legal professional (Lawyer, LLLT, LPO)	

Scott Kirk	Licensed legal professional (Lawyer, LLLT, LPO)	Allowing attorneys the freedom to choose which specific type of ethics issues that are most relevant to their practice is critical to having an effective legal education program. The rules in Washington state are already too prescriptive - please don't make CLE any more prescriptive!
David R. Risley	Licensed legal professional (Lawyer, LLLT, LPO)	Small arrogant factions want to impose their priorities. Why not offer these courses and see if the Bar as a whole will find them useful.
Judge J.E.Sullivan	Licensed legal professional (Lawyer, LLLT, LPO)	Stop micromanaging and trying to control everything - your suggestions appear to arise from institutional co-dependence. By mandating and subcategorizing as you propose, you are simply making it harder and harder to understand your CLE requirements, and you create a labyrinth of confusion. Simply add these topics as a matter of choice. People will take them if the speakers are good, and the materials help them practice law. If you want to address mental health in the organization, please read Anne Wilson Schaef's book, the Addictive Organization.
Rachel Hill	Licensed legal professional (Lawyer, LLLT, LPO)	
Erica	Licensed legal professional (Lawyer, LLLT, LPO)	
Larisa Sullivan	Licensed legal professional (Lawyer, LLLT, LPO)	CLE credits are already an expensive endeavor and there's no compelling reason to add to that burden. Additionally, the ethics credits that any individual attorney attends should ideally be relevant to their practice and the proposed additions would not be relevant to all.
Lisa Neal	Licensed legal professional (Lawyer, LLLT, LPO)	It is already challenging to find - and pay for - CLE programs that are relevant to the area of the law in which I practice. Not all of us work for large law firms that cover CLE costs, and the cost of programs is not low. These proposed additions are not directly relevant to any area of the law, and the vague but specifically outlined topics are going to be hard to find. "Equity ethics" is unspecific, but appears to envision a generalized instruction in "equity" that is not tied to the practice of law but is rather a general instruction on bias. "Technology security ethics" is already required, and the information proposed is already learned and discussed by lawyers and courts (and has been since the 1990s). "Mental health ethics" evidently has to do with already in-place ethics requirements for lawyers - but implies stress management and work-life balance will be a required topic, even if one does not have that issue (or is not an alcoholic, etc.). This requirement would be akin to requiring me to take patent law courses when I do no practice patent law. Similarly, to the extent the Board decides to require these sub-sets of "ethics" courses, they should be included in the Ethics Credits requirement, not be made new stand-alone requirements, and should not increase the CLE requirements. Further, there is no valid reason to not allow carryover to fulfill obligations for these specific requirements. Finally, to the extent these are "new" issues that the Board suggests be learned by lawyers, I do not agree that these issues impact my competency to practice law. As such, they are not validly required for renewing my license.
Erich Potter	Licensed legal professional (Lawyer, LLLT, LPO)	

Tonya Hebert	Licensed legal professional (Lawyer, LLLT, LPO)	The last thing we need is specific curriculum requirements to a level that is micro managing.
Roger W. Boardman	Licensed legal professional (Lawyer, LLLT, LPO)	
Lindsay Abraham	Licensed legal professional (Lawyer, LLLT, LPO)	Please do not make it more difficult to have to obtain CLE credits. It is already complicated enough to earn the appropriate credits. I would instead recommend offering free lunch and learn ethics credits in the areas you have proposed so that more people will take them, but not require them overall. Many lawyers work for entities that have separately required trainings of this nature that are specific to their business but don't qualify for CLE, and this would be duplicative as well.
Jeffrey M Hawkinson	Licensed legal professional (Lawyer, LLLT, LPO)	
Adrian Bateman	Licensed legal professional (Lawyer, LLLT, LPO)	
Jessica Moore	Licensed legal professional (Lawyer, LLLT, LPO)	The more specific topics are required the less practitioners have the flexibility to take continuing education in areas they personally require to learn and develop specific to their practice.
Paul Routt	Licensed legal professional (Lawyer, LLLT, LPO)	
elizabeth penoyar	Licensed legal professional (Lawyer, LLLT, LPO)	MCLE credits, and reporting, are getting more and more involved. It's time consuming, and confusing to keep these credits straight. How about just having monthly or weekly day long CLE's that cover just the mandatory ethics credits required.
Deneen Person	Licensed legal professional (Lawyer, LLLT, LPO)	
Kari Brady	Licensed legal professional (Lawyer, LLLT, LPO)	I think this should be included in the regular hours required, not additional hours added.
Laurie Gibbens	Licensed legal professional (Lawyer, LLLT, LPO)	I think the Suggested Amendment would make it significantly harder to meet the CLE requirements without any indication that the requirement would lead to an improved experience for members of the public. It would be very difficult to sort through offered CLEs to find ones that satisfy the credits needed in four separate subcategories of Ethics.
Rhonda Munson	Limited Practice Officer	
John Spalding	Licensed legal professional (Lawyer, LLLT, LPO)	
Elaine Nordgaard	Licensed legal professional (Lawyer, LLLT, LPO)	I believe the required training should be limited to education relating directly to the work that we do and not other training that our employers would like us to have or our mental health. Mental health is a personal choice. I can see that spreading into other peoples opinions and choices that don't directly affect our job.
Joe Williams, Jr.	Licensed legal professional (Lawyer, LLLT, LPO)	These requirements are not necessary for all attorneys and are a waste of time for those of us who do not need them. They should be optional or mandatory for those who engage in misconduct or negligence. I barely have enough time to complete the mandatory classes (in addition to the specialty classes or personal growth coursework I voluntarily complete on my own). There is a novel concept: professionals taking personal responsibility and acting like professionals. Thank you for trying to make the bar better, but this path of more mandatory "classes" are not helpful.
Keri Olson	Licensed legal professional (Lawyer, LLLT, LPO)	We have enough required credits already.

Richard Finnigan	Licensed legal professional (Lawyer, LLLT, LPO)	
Jarett Goodkin	Licensed legal professional (Lawyer, LLLT, LPO)	Attorneys already have significant workloads and often struggle to find the time to meet the current CLE requirements. Our jobs are already stressful enough in a post-pandemic world. While one might argue that the situation supports adding a mental health CLE component, creating more hoops to jump through is not the answer. The bar should not add these requirements. Licensed attorneys are in the best position to decide the courses that best suit their needs.
Alesia Pinney	Licensed legal professional (Lawyer, LLLT, LPO)	While these are interesting topics, they should not be required topics for all lawyers. A focus on offering really educational and low or no cost CLE in this area would enable anyone interested to learn.
Angela Kosoff	Licensed legal professional (Lawyer, LLLT, LPO)	Over the past few years, it has been extremely difficult to acquire ethics credits and adding more seems to be unreasonable. If it is going to be a requirement, we should be able to get these credits easier or have our company's mandatory training for these items go on the list for approved courses. Although I think it is important for the items to be known it is also important that it is not a burden on us to take additional classes at high costs to acquire them
Debra Defreyn	Licensed legal professional (Lawyer, LLLT, LPO)	I am a government lawyer. I receive a lot of technology training and am competent to do my job without additional requirements from the WSBA. I mean, we don't have to have mandatory grammar CLEs - is that next? I'm also opposed to Mental Health ethics being required. I'm not even sure what that means but I'm doubtful it applies to my work representing state agencies (as I have for 24 years). Thank you.

Nicholas Stampfl	Licensed legal professional (Lawyer, LLLT, LPO)	We are adding too many specific-subject credits that are hard to keep track of and hard to keep up with. Most of the information becomes repetitive and doesn't add much the second or third time I see it. A couple of rhetorical questions: What are these requirements trying to accomplish? What are the knowledge objectives? If the goal is to create an attorney who uses technology in a secure matter, that will not happen after a one hour CLE course. Likewise, you could easily teach someone some basics about mental health ethics in an hour, but that will not make that person a good person if they already have unethical intentions. Most of the recent changes to the CLE requirements have not helped me in my area of practice, as my employer already provides numerous, higher-quality trainings on similar subject materials that do not meet the MCLE board's requirements. Most of the CLEs offered or approved by WSBA are focuses on Washington State courtroom practitioners, but many of our attorneys work for federal agencies, as in-house counsel for corporations, or in other practice areas. Many of the CLEs I have attended that meet the credit requirements The subject matter for CLE-credits should be driven by individuals, not the board. If I need to know a subject to stay competent in my field of practice, I will learn it or study about it. No amount of one-hour trainings on ethics or diversity or mental health will make someone a good person or will put kindness in their heart. The discipline system exists for a reason--To address the bad actors.
Phillip Curiale	Licensed legal professional (Lawyer, LLLT, LPO)	
Krystle	Licensed legal professional (Lawyer, LLLT, LPO)	
Attorney in Washington	Licensed legal professional (Lawyer, LLLT, LPO)	MCLE is already over regulated and over administrated. Adding these requirements will not improve representation for clients, in fact I'd bet the correlation of taking these classes to rendering improved counseling is not even existent. The same lawyers that fail their clients in these specific areas of technology and mental health are still going to have the same problems, whether or not this mandatory requirement is enacted. It's more hassle, more expense, and more red tape that is not needed.
Glenn Slate	Licensed legal professional (Lawyer, LLLT, LPO)	The problem with specialized CLE requirements is that is creates an unreasonable burden on too many small firm lawyers, by making them take classes they do not need. For example, I have a Masters degree in psychology. Why should I be required to take a CLE that provides information targeted to an audience that has significantly less training in the area than I already have? There is no free lunch. Every hour wasted satisfying unneeded bar requirements, raises costs, which raise rates and impacts access to justice.
Brian Klein	Licensed legal professional (Lawyer, LLLT, LPO)	The proposed new MCLE credits are an unnecessary burden.

Aaron Williams	Licensed legal professional (Lawyer, LLLT, LPO)	Recently, the CLE program has become increasingly focused on promoting unfounded politically left ideology rather than actual "legal" education. The "equity" ethics category for legal ethics is exactly such a non-legal course meant to indoctrinate attorneys in an anti-white racist and anti-male sexist view of our country, our society, and our state. This view is unfounded because it lacks any understanding of basic statistics, and that correlation is not causation. Such "education" creates an environment of racial harassment. It is illegal under both state and federal constitutions to discriminate against people on the basis of sex and race. It is also immoral and likely illegal to subject them to racial harassment in a required "CLE." The CLE Board seems to have forgotten that we still live in a free country and that racial discrimination against all people, including white people, is illegal. Promoting it is not legal education at all, no matter how much the adherents to this ideology disagree. Nothing needs to be changed with our ethics requirements. This is a solution in need of problem.
James Cushing	Licensed legal professional (Lawyer, LLLT, LPO)	Were not in the business of providing mental health care.
Douglas W. Scott	Licensed legal professional (Lawyer, LLLT, LPO)	Keep it the way it is with no added requirements.
Jesse Aston	Licensed legal professional (Lawyer, LLLT, LPO)	Generally, I do not agree with increasing the required credits due in any given reporting period. Instead, I think these new areas should electively permit members of the bar to substitute these credits under existing requirements. I am also concerned about what is meant by equity ethics and think further clarity is required to ensure that such a requirement does not become an agent of coercion and hypocrisy within the bar.
Kris Sundberg	Licensed legal professional (Lawyer, LLLT, LPO)	This is getting too complicated. CLE compliance is turning into a Byzantine administrative exercise. Please, no more special requirements. Thank you for considering this response.
Kelly Keller	Licensed legal professional (Lawyer, LLLT, LPO)	
Linda M Callahan	Licensed legal professional (Lawyer, LLLT, LPO)	
Peter Sisson	Licensed legal professional (Lawyer, LLLT, LPO)	I feel the current requirements for ethics CLEs are sufficient. Lawyers who feel the need for technology security or mental health education are able to and should seek that on their own. Adding these requirements for all lawyers is different than adding the equity/diversity requirement which I favored. That requirement serves to broaden all our perspectives in a beneficial way that is more generally applicable vs. the current proposals.
Micah Balasbas	Licensed legal professional (Lawyer, LLLT, LPO)	I am not in favor of any requirement related to what ethic credits I earn. I should be allowed to pick the ethic credits that are relevant to my work and that I feel is important. Requirements that I participate in specific areas are forcing someone else view point on my ethics.
Terence Lynch	Licensed legal professional (Lawyer, LLLT, LPO)	The members of the bar are intelligent and informed individuals. We should be trusting them to make intelligent and informed decisions about what CLE will best advance their quality of practice. Options like the proposed ethics CLE categories should be promoted, but not mandated.

John Panesko	Licensed legal professional (Lawyer, LLLT, LPO)	Of course lawyers feel stress. So do dentists and doctors and plumbers. Our solution to deal with stress is a reliance on firm Christian beliefs. That's probably not your solution. Of course the internet is a dangerous place. It's dangerous for everyone. Our solution for security is that no law office computer is connected to the internet except for one used for emails. That's probably not your solution. My point is that various lawyers will find various solutions that fit their lives, not yours. To force every lawyer to attend classes is to assume that every lawyer has a problem and that they will adopt your solutions. You are arrogantly wrong in that assumption. Lastly, I am suspicious about the term "equity ethics." Equity means whatever feels good at the time and ethics is a set of principles. Combining them means a set of principles that feel good at the time. That should not be the basis for anything. Maybe it's your code phrase for something else, I don't know. If you offered these proposed CLE courses voluntarily, you'd know exactly how many lawyers want your solutions to their assumed problems.
Clifton Gilley	Licensed legal professional (Lawyer, LLLT, LPO)	We do not need more specialty CLE credits which will likely incur a premium cost to obtain. A "one-credit" requirement is ridiculously performative.
Juni Luyombya Ozzengett	Licensed legal professional (Lawyer, LLLT, LPO)	The APR 11 is sufficient as is.

Keith Burney	Licensed legal professional (Lawyer, LLLT, LPO)	MCLE requirements do very little to further a legal professional's learning and the proposed amendment will only further the already unnecessary burden placed on legal professionals to acquire MCLE credits. Furthermore, it will enrich the already bloated CLE provider network at the expense of legal professionals. Because CLE providers are incentivized to sell their CLEs to the widest possible audience, these providers frequently offer only basic information about a topic. Thus professionals in a particular area of law are left sitting through CLEs about information they already know or worse they are forced to take CLEs in areas of law in which they never practice. This benefits only one party, the CLE provider. Multiple bars across the country have no CLE requirements and the lawyers in those states are no less professional than they are in Washington. Those lawyers seek out opportunities to learn and grow that are meaningful and further learning in their chosen field because they want to be better. When they don't, they quickly learn the consequences of falling behind. Forcing lawyers to sit through endless hours of CLE doesn't improve their professionalism. Nor does it make client's experience better. It simply enriches the CLE provider industry.

William Krause	Licensed legal professional (Lawyer, LLLT, LPO)	technology, technology security, and mental health. Because there is a dearth of materials/courses out there that speak to these subjects. This is something the WSBA could focus some of its time and treasure (treasure provided by lawyers via annual dues) to create and maybe even make available for FREE to members. I would hazard a guess that if the WSBA made free cle's available to members on these subjects, they would be oversubscribed and the stated goal of educating lawyers on these subjects would be met, in surplus, and that would be a very good thing. But, the mere creation of the requirement does something else -- in a world where it is pretty common for lawyers to be charged $75, $100, or much more for a CLE course-- the requirement would create a dynamic where practicing attorneys would have to scurry around to find CLEs which fit each niche (perhaps we can, perhaps we can't) and likely pay a huge sum for what might be poor content, simply to fit each niche. Or risk being disbarred. Couple this with the fact that most CLEs aren't WA focused, so finding one produced in, say, New York or California which one could then take and apply to fit into the niche, creates a dynamic which is bound to be frustrating and counter-productive -- the goal isn't to make lawyers' lives much harder (at least, I hope it isn't), it is (I hope) to give us the opportunity for quality legal education in the subject matters of information security, mental health, etc. The reality is that the vast majority of lawyers float along during their three year MCLE cycle, taking courses which are of interest/use to them (ideally provided by a quality source, for free) and then end up scrambling at the end of year three to fill the rest of the slots. I strongly believe that if the WSBA created free CLE content in these subjects, you'd get something close to 100% of Washington attorneys taking these courses, without the mandate. If you create a mandate and don't address the creation of readily available content for each niche, you're just being a nag, not a problem solver. IF the first paragraph of the amendment said: "WSBA will create, and provide for free, at least two hours of in-person and on-line CLE content each year for each of the following requirements: (1) technology security, (2) mental health (and
Katherine Bozzo	Licensed legal professional (Lawyer, LLLT, LPO)	We don't need more oversight or more opportunities to be charged to attend MCLEs. In addition, many of the ethics CLEs I attend already cover these topics.
Jennifer Whang	Licensed legal professional (Lawyer, LLLT, LPO)	Wsba already requires enough mcle and it would be burdensome to require additional specific types of credits, especially for those of us that practice outside of Washington. The process of getting credits approved by wsba outside of Washington is cumbersome, time consuming and frustrating. I have had credits linger in an unapproved state for reasons beyond my control and oppose additional requirements.
Patrick Joseph Kirby	Licensed legal professional (Lawyer, LLLT, LPO)	Lawyers must be knowledgeable of all the Rules of Professional Conduct, including RPC 8.4(g), to be licensed. Respect for the dignity of every individual is a cornerstone for the legal profession to make justice possible. See RPC Preamble. In addition, this is common sense: treat others as you have them treat you. We have sufficient ethical rules and CLE's requirements regarding respect for all persons. We need to treat lawyers like adults.

Kate Fairborn	Licensed legal professional (Lawyer, LLLT, LPO)	If anything, the WSBA should be lowering CLE requirements, while making more content available for free... You cannot simultaneously advocate for more affordable legal services, while ever increasing the cost of being an attorney, especially in an inflationary cycle. Roll back CLE hours.
Ken Yalowitz	Licensed legal professional (Lawyer, LLLT, LPO)	The issues relating to the proposed CLE requirements are not applicable to all practitioners and therefore should not be imposed as requirements across the board.
Richard Young	Licensed legal professional (Lawyer, LLLT, LPO)	Stick with law.
Daniel Rey-Bear	Licensed legal professional (Lawyer, LLLT, LPO)	I could see requiring this once or maybe once every five years, but not every reporting period. If these are required, the State Bar should provide these for free.
Lauri Lewis	Licensed legal professional (Lawyer, LLLT, LPO)	Instead of increasing the continuing legal education requirements, I suggest the WSBA include suggested and recommended CLE courses in emails or its website(s). WSBA has done a good job in the past of making these proposed CLE courses free to WSBA members. If such practice continues, then it is easier for WSBA members like me to attend and get the recommended CLE training.
Christine	Licensed legal professional (Lawyer, LLLT, LPO)	I am an out-of-state member of the bar and continuing to add special CLE categories makes it harder for me to fulfill the requirements with classes available virtually or local to me.
Bijan Jalili	Licensed legal professional (Lawyer, LLLT, LPO)	Ethics credits have traditionally been some of the hardest to fulfill, parsing out into various specific ethic requirements would make licensing more difficult and likely more expensive.

Joel B Gilman	Licensed legal professional (Lawyer, LLLT, LPO)	While I appreciate the importance of the matters to be addressed in the proposed MCLE subjects, I am against making them mandatory topics for MCLE reporting. If these topics are of great importance, has the WSBA specifically addressed them in the Bar Exam questions? Do Washington's law schools include these issues in their course offerings? It would be very unwise to turn MCLE into a shopping basket filled with mandatory subject-specific course requirements, especially in regard to issues that are of current interest right now but may not be in future years. Technology Security Ethics, in particular, appears to be an issue of the moment, given the rush to put all information and communjcations "on the web" even though the technology is still rather primitive. It is certainly a timely issue, but I doubt that it will always be that way. Mental health is always timely, but it is always an issue for the entire society to deal with, not just lawyers. Other timely and important legal topics right now include Election Law. Should we not also include a mandatory CLE credit on the ethics of filing suit to overturn an election? Many lawyers across the country have been doing that recently, including right here in Washington (Culp v Wyman, King Co Sup Ct # 20-2-17720-2 SEA). I am opposed to the Suggested Amendment. Respectfully, Joel B Gilman, Seattle WSBA #13322
John	Licensed legal professional (Lawyer, LLLT, LPO)	Ethics requirement should not be increased to eight credits. Not sure how anyone could view a mental health credit as a requirement. That is a personal health matter and related to the practice of law.
J Scott Miller	Licensed legal professional (Lawyer, LLLT, LPO)	Although I do agree ongoing professional education is critical, the requirements are becoming confusing and onerous. Also please consider the cost of MCLE. As a sole practitioner it is extremely costly to pay annual licensing and MCLE costs, as well as taking time away from the actually practicing law (which pays for the annual licensing and MCLE costs).

Neil McPherson	Attorney	This is getting too complicated. It distracts from the policy of elevating "equity" as a special focus issue. It is easy enough to make attorney aware that their IT has to meet HIPPA security standards; the IT people know what that is, and it is a known standard. The Bar already has great resources for lawyers. Mental health is important, but see #1 & #2. I see some leadership in the destigmatizing of seeking mental health help from the Bar. Probably during CLE's where presenters self-identified mental health diagnoses. Leadership, exemplars, education, commitment; not more bloody rules. vty, -nm
Hanh Disch-Le	Licensed legal professional (Lawyer, LLLT, LPO)	I am not in favor of the amendment to raise the ethic credit requirement. I may support it as one of the existing ethic credit requirements, providing that the WSBA is flexible and willing to accept credits for this technology security credit. There has been many incidents when credits are not accepted by WSBA when other states accept them and they are completely legitimate. In order to change this requirement, I would highly recommend to review the existing CLE approval criteria. Most states allow 1 CLE credit for a 60 mins course, the WSBA requires more than 60 mins. As a professional, I find it time consuming to take time to take a course & apply for credits and think that they are completely acceptable and get denied without specified season. It seems very subjective. The process needs more transparency and less burdensome CLE credit requirements. It should be consistent with the requirements of other states.
Ed Stemler	Licensed legal professional (Lawyer, LLLT, LPO)	Adding additional categories is a HORRIBLE idea. There are already plenty of these types of CLE's available. Give attorneys some credit for being able to determine what classes help them in their field. Are you next going to start adding categories to general credits so that people must learn real estate even if they never practice in that area? Not allowing carry over is an even worse idea. I was not one of those in favor of eliminating bar associations, but please quit with the ever expanding attempt to control people who are generally smart and able to make their own decisions. For example, I don't need your AI attempting to tell me what to write!
Marcus Chong Tim	Licensed legal professional (Lawyer, LLLT, LPO)	
Colleen M Cook	Licensed legal professional (Lawyer, LLLT, LPO)	The Bar should trust professionals to chose CLEs that are helpful to their practice and not make the completion of CLE requirements more complicated.

Scott Strickland	Licensed legal professional (Lawyer, LLLT, LPO)	Placing even more burdens and restrictions on the practice of law only further drives disadvantaged communities and individuals out of the practice of law. MCLEs are already burdensome enough and rarely relate in anyway to the daily practice of law for many attorneys (those in labor law especially). Additionally, while the classes are well intentioned, I sincerely doubt that a couple MCLE videos will actually impact those who are most responsible for perpetuating the institutionalized racism and other problems that continue to plague the legal system.
Rick Eichstaedt	Licensed legal professional (Lawyer, LLLT, LPO)	Attorneys already have a substantial burden (time and funds) to complete existing CLE requirements. If this does proceed, I recommend that the equity, technology security, and mental health credits be a one time only (or perhaps every 10th year) and that these additional credits be provided free of charge by the Bar.
Tiffany Walsh	Licensed legal professional (Lawyer, LLLT, LPO)	Lawyers shouldn't be obligated to do ethics in tech or mental health. I think the courses should be available to take if one decides to take them but they should not be an obligation. Professional responsibility ethics are enough and can be broadly stated. Legal professionals should have the ability to pick which CLE courses they want to further their career, which the suggested amendments don't necessarily do.
Chris Waraksa	Licensed legal professional (Lawyer, LLLT, LPO)	It is better to allow individuals to choose the CLE credits that serve their needs for professional development rather than imposing requirements that will be inadequate and overbearing. Personally, I've never found a one credit CLE to be very helpful in meeting at ethical requirements.
Evan Loeffler	Licensed legal professional (Lawyer, LLLT, LPO)	
Laurie Thornton	Licensed legal professional (Lawyer, LLLT, LPO)	Please don't make CLE compliance harder and more expensive.
Matt Renda	Licensed legal professional (Lawyer, LLLT, LPO)	Increasing the total number of required ethic credits or granting general ethic credits for the specific areas of security and mental health would be fine; but General, Professional, and Equity ethics are all that should be required. Please do not expand the list of required ethics credits into a never ending list of possible sub-genres in a quest to cater to the new ethic flavor of the month. All of these can be included under general ethics.
Craig Briggs	Licensed legal professional (Lawyer, LLLT, LPO)	The current MCLE requirements contain broad enough coverage for the substantive material that would be created in these additional specific subcategories.
Barbara Frost	Licensed legal professional (Lawyer, LLLT, LPO)	
C. Rio	Licensed legal professional (Lawyer, LLLT, LPO)	
S. Korn	Licensed legal professional (Lawyer, LLLT, LPO)	
CYNTHIA RIOS	Licensed legal professional (Lawyer, LLLT, LPO)	
Alisha Suazo	Licensed legal professional (Lawyer, LLLT, LPO)	
Susan Hufman	Licensed legal professional (Lawyer, LLLT, LPO)	Too many categories and too much detailed micro-managing. Why not require 2 credits from 4 categories with each category needing 1 credit at least every three years? or something similar?
Daniel Seligman	Licensed legal professional (Lawyer, LLLT, LPO)	

John Eric Gustafson	Licensed legal professional (Lawyer, LLLT, LPO)	I oppose the continuing imposition of mandates by the Board for items that may have little relevance or importance to many members use of their license, indeed probably the majority. Members are smart enough to know what we benefit them, and the Bar can require this of new members or those who have shown need for the same.
Joshua green IV	Private practice let my license go dormant	Very little of the woke and progressive measures adopted actually advance the legal community. Lower standards, lower expectations, and less solid results follow. No.
Stephen John Henderson	Licensed legal professional (Lawyer, LLLT, LPO)	Now you want to slice up the ethics credits into bites that some bar committee deems are necessary? Why not trust us to decide what is necessary. If you explain the topics well and sell us on why we need the education, we can decide to take the classes. Don't mandate what courses we have to take within the broad category of ethics. Please don't treat us like children.
Darcy Scholts	Licensed legal professional (Lawyer, LLLT, LPO)	
margita dornay	Licensed legal professional (Lawyer, LLLT, LPO)	I could care less if these credits are added to the requirement of the CLEs but adding them IN ADDITION to our existing requirements is absurd. Either add them as a subcatetgory replacment credit but don't tack them on as additional credit requirements. We are too busy as it is with the existing requirements.
Jody Smoth	Licensed legal professional (Lawyer, LLLT, LPO)	This amendment has nothing to do with the practice of law and is merely more HR/DEI nonsense.
Thomas W. Cox	Licensed legal professional (Lawyer, LLLT, LPO)	
Scott Holleman	Licensed legal professional (Lawyer, LLLT, LPO)	This change would introduce unnecessary complication and expense. Everyone has their pet issue or sub-issue that they think people should take CLE courses on. I believe it is better to keep the current broad and general categories to allow greater flexibility as busy professionals are simultaneously going about their day-to-day work representing clients.
Alicia Levy	Licensed legal professional (Lawyer, LLLT, LPO)	
Paul Treyz	Licensed legal professional (Lawyer, LLLT, LPO)	Would add to confusion and waste of time spent in legal education
Christine Glenn	Licensed legal professional (Lawyer, LLLT, LPO)	
Kirsten Dutz	Licensed legal professional (Lawyer, LLLT, LPO)	
Bruce Huber	Licensed legal professional (Lawyer, LLLT, LPO)	1. I oppose the proliferation of categories and subcategories within the Continuing Education framework. There should be a presumption against new categories which could be overcome only by clear evidence, over a long period of time, that would justify subjecting the *entire* state bar to new CLE content each cycle into perpetuity. 2. As a more general matter, I am quite doubtful that mandatory exposure to CLE content will "move the needle" on the matters that the Amendment seeks to address.
Mike Fisher	Licensed legal professional (Lawyer, LLLT, LPO)	We already have a good MCLE program, and adding a requirement for more credits would make it onerous. Don't fix something that isn't broken.
Steven Ellis	Licensed legal professional (Lawyer, LLLT, LPO)	As an attorney in good standing, I find the proposed changes, as well as the memorandum purporting to support them, insulting and offensive. I oppose this amendment.

Mel Simburg	Licensed legal professional (Lawyer, LLLT, LPO)	It is a good idea to offer more CLE opportunities in mental health and technology security. It is a good idea to include those courses as ethics credits. It is a bad idea to require more ethics credits and a bad idea to require specific compliance in more categories. In addition to creating more confusion and more difficult record-keeping, compliance will be more of a challenge. Currently, many attorneys find it more of a challenge to comply with 6 ethics credits than to comply with overall CLE credit requirements. This proposed change would make compliance even more complex and more difficult. Furthermore, it is overkill. Solo attorneys without staff can decide for themselves whether mental health awareness would be a useful course or not. Most attorneys now are acutely aware of technology use and ethical issues. So, in many cases the new rule would require unnecessary courses. It would be better to make the offerings available, let attorneys choose what they need, and give them general ethics credits for all the courses.
Tim Seeley	Licensed legal professional (Lawyer, LLLT, LPO)	I'm not necessarily opposed to increasing the ethics requirements, but I would suggest it is generally better to allow attorneys to tailor their CLEs to mee their specific needs and the specific needs of their practice versus mandating too many specific types of CLEs. IF A CHANGE IS MADE – THE WSBA MCLE TRACKING PAGE NEEDS TO BE TIMELY UPDATED TO TRACK THE REQUIREMENTS ACURATELY. I BELIEVE THAT THE GROUP REPORTING FOR 2023-2025 IS REQUIRED TO GET AT LEAST ONE EQUITY CREDIT, BUT I DO NOT BELIEVE THE MCLE TRACKING PAGE STILL HAS NOT BEEN UPDATED TO TRACK THAT REQUIREMENT. THE MCLE TRACKING PAGE NEEDS TO BE TIMELY UPDATED TO REFLECT CHANGES IN ANY CHANGES TO THE MCLE REQUIREMENTS.
Sean D Hyde	Licensed legal professional (Lawyer, LLLT, LPO)	This seems like an unnecessary categorization that creates an undue burden on licensed legal professionals, especially as we would try to adjust to the changes. Simply promoting/providing quality CLEs in these categories is less burdensome and would better serve the goals of the suggested amendment.

Brian J. Considine, WSBA #39517	Licensed legal professional (Lawyer, LLLT, LPO)	these areas to help with their practices, if they believe they need it. However, it appears that this is another concept that has not been developed with government attorneys in mind. I do not see any indication that the committee spent time considering the impact on government attorneys in requiring more credits for government attorneys who are many times in a situation of paying for CLE credits themselves. Additionally, it does not appear to contemplate that government attorneys receive trainings and resources in these areas on a regular basis as part of their job in being a government employee and representing government clients. This would now require additional work and cost for government attorneys where it is not needed because trainings and resources are already provided by government agencies and these resources will likely be more extensive than the CLE requirements being considered. In addition, the technology background provided in the MCLE materials is solely related to private law firms. It does not consider local and state government agencies that have their own significant IT infrastructure and infrastructure requirements by local and state laws. Government attorneys can fulfill their requirements of competence and diligence by the mere fact that they are employed by agencies who make significant investments in training and infrastructure to ensure data and personal information is protected. Government attorneys do not need to pay for additional CLE credits for this purpose as we have sufficient resources and understanding to ameliorate any issues identified by the MCLE committee. Lastly, government attorneys have access to numerous resources made available through their agencies and unions to assist with mental health issues. At the state level, we have specific programs we can access through both our health care plan and
Eric Krening	Licensed legal professional (Lawyer, LLLT, LPO)	This appears to be agenda oriented micro management. The only one of the four proposed categories that is in the RPC's is category #1. All four categories are valid concerns and they - as well as others - should be offered as CLE's. They should not be required.
Donald G Stone	Licensed legal professional (Lawyer, LLLT, LPO)	Adding additional layers of required subject matter for CLEs in neither necessary nor desirable. Classification of some of the existing CLE content is questionable if not arbitrary. Adding addition complexity to CLE reporting is unwarranted. This proposal should be rejected. Don Stone
Mimi Buescher	Licensed legal professional (Lawyer, LLLT, LPO)	This is unnecessary and burdensome. A waste of time.
Richard peyser	Licensed legal professional (Lawyer, LLLT, LPO)	All of the mandatory CLCLA requirements are getting out of hand. First of all legal professionals can decide what they need for Cle on our own. There should be no mandatory requirement. It is a waste of money. Also the change in the ethics requirements, seem to benefit those who have problems in certain areas. I believe the bar association is treating all of its members like children requiring mandatory subjects that have no bearing on the practice. All of this should be considered.

Albert Wheeler	Licensed legal professional (Lawyer, LLLT, LPO)	I think we've got enough regulation to sufficiently protect the public. At some point you're making it too difficult to maintain a quality of life in the practice of law. Added unneeded regulation increases stress in the profession and actually increases mental health pressures. This is beyond that point. Please. Enough already.
Karina Salazar	Licensed legal professional (Lawyer, LLLT, LPO)	My concerns are as follows: (1) These sound like very niche areas of ethics in that I am not sure where I would be able to obtain those MCLE credits outside of the WSBA CLE store. (2) Further, I don't think either category is necessary. Many in our profession still use paper primarily and mental health is being addressed by almost every employer as well. The first is not readily applicable to many and the second is already covered by many.
Ron Bueing	Licensed legal professional (Lawyer, LLLT, LPO)	While these are areas in which I have interest and would likely attend ethics classes, I see no reason for further mandates.
Andrew Hay	Licensed legal professional (Lawyer, LLLT, LPO)	We have enough rules already. We should be working on reducing rules or keeping the number of rules from increasing. If you want to spread knowledge of ethics in these areas, make the programs available and promote them. But it is already burdensome enough to keep track of and meet licensing requirements. As people in the legal community and just as everyday people in our complex society we are surrounded by rules that increase in number and complexity over and over again. We don't need more rules. People in all localities and walks of life share great frustration with our civil institutions. Some of this is because we feel overwhelmed by the mass of regulations that have to be navigated when our lives intersect with our institutions. The bar association is an important civil institution. Changes to the regulatory framework should be made only if the changes decrease the number and complexity of rules. This proposed change makes things more complicated and burdensome and will therefore harm this institution beyond the perceived benefit. We want to see changes that ease and simplify our licensing requirements.
Kelly Elford	Licensed legal professional (Lawyer, LLLT, LPO)	Creates more restrictions than is needed. At the moment, attorneys and other legal professionals may choose what ethical items they feel is most helpful to them and their practice. Whether they utilize the information is another question. However, mandating all attorneys do minimum amounts in increasing categories is unduly restrictive, and potentially nothing more than a feel-good box to check, assuming that people will actually listen.

Joshua Dabling	Licensed legal professional (Lawyer, LLLT, LPO)	"Equity ethics" immediately smacks of POLITICS. The bar should be SEPARATE FROM POLITICS as much as humanly possible. We should be able to act ethically despite what party is in power this week. I have my own beliefs, the bar need not apply the politics of a majority political stance upon a minority of us who aren't woke. I will refuse to take woke "ethics" and will encourage other attorneys to refuse to take woke "ethics." I already know better than to store my client's information on systems that can be hacked or use systems that aren't secure. Furthermore, I'm a solo guy, not a big tech firm. Do you really think I stand a chance against a professional hacker? No! So I don't even store that sensitive info on my system. I do not need an hour lecture every three years or so on why I need to be careful, I'm conscious enough of the real world. I am generally opposed to CLE's in the first place because I am already constantly PRACTICING my trade. No one ever makes the classes that would actually be useful in my line of work and taking a CLE for 8 hours on lines of practice I won't ever be a part of helps no one. I do not believe we need even more! When I go to the classes I see people generally ignoring the class anyway because they too either already know the topic because they practice it or may ignore it because it's not their branch of law. 99% of the class is catching up on email and ignoring the presenter, please don't add another two hours to this farce. If anything we need less of the sanctimonious lecturing. I am 100% for the ethics, just not the requirement for the ethics class. I assure you that sitting through even more hours of watching others ignore the lecturer will not convince me even more that my reputation and that of my profession matters to me.
Christopher Dellert	Licensed legal professional (Lawyer, LLLT, LPO)	
Bruce W Hilyer	Licensed legal professional (Lawyer, LLLT, LPO)	Please avoid micro managing the CLE process - allow the lawyers to select areas where they feel the need for more education.

Steven A. Reisler	Licensed legal professional (Lawyer, LLLT, LPO)	merit of the proposals. 1. There clearly are technical security issues involved in the current practice of law. I have lectured on related topics - not to lawyers, but to techies who see these issues and their consequences from the software/hardware perspective oblivious, for the most part, to the overlay of legal complications. Technical security issues are not, in a nutshell, unique to the practice of law. They inhere in the drive toward digitizing processes that, frankly, may be inappropriate for digitizing (such as medical records). It's very similar to the way the courts have entered into public-private partnerships (so called) in order to "save money" or because "that is the way business is done these days." It's not an ethics issue. It's a political-economic-technology issue at its core. And it is an educational problem. Most people - lawyers not excepted - do not have a real clue how the Internet, the Cloud (so called) or any of their ancillary systems work or why they are irremediably insecure. Ultimately, I sense that wrapping this up as another mandatory "ethics" will lead to what I have seen with other CLE mandates: the larger tech companies - either directly or through their approved licensees or consultants - simply will offer a palette of "ethically approved" solutions to the irremediable problems. They will, in fact, solve nothing and educate no one. The main achievement will be to direct more business to the usual tech companies who market "solutions" that will have been approved with the WSBA's imprimatur, thereby making them "ethically secure," even when they are not actually secure. 2. Re mental health ethics, again, I think that the Bar is missing the forest for the trees. Without a doubt, there are ethical issues entwined with mental health issues and the
Adam Papini	Licensed legal professional (Lawyer, LLLT, LPO)	It is already difficult to obtain Ethics credits, and I believe this is a requirement that is is unnecessary because the two proposed areas of Ethics can easily be accommodated within the current requirements.
Darren Thompson	Licensed legal professional (Lawyer, LLLT, LPO)	As a government employee, I get plenty of training on technology security and I have more than enough access to mental health resources and trainings. These topics should be optional for lawyers to pursue if they wish, and should not be mandated by WSBA as additional reporting requirements.
Meghann Morrill	Licensed legal professional (Lawyer, LLLT, LPO)	
Carol Koppelman	Licensed legal professional (Lawyer, LLLT, LPO)	

Andrew Van Winkle	Licensed legal professional (Lawyer, LLLT, LPO)	The technology security ethics requirement as proposed will not be relevant to many institutional lawyers. To the extent it is relevant, institutional lawyers already have annual institution-wide cyber security training. I have worked in county, state, and federal government and all three have several hours of annual information/technology security training. In my current position as a state employee, I receive approximately 8 hours of mandatory technology security training annually. I do not need the WSBA mandating that I do more redundant training. While a lawyer could probably petition the Bar to have that existing training count toward this credit, it would be easier if the requirement was limited to just those lawyers who are in private practice. If adopted, the proposal should limit the technology ethics credit to only those lawyers who are required to maintain an IOLTA account and thus those who are unlikely to have a technology security training program in place. I support mandating a MH credit every reporting period. I do not support mandating the credit be related to the intersection of ethics and MH. It is imperative for lawyers to become better educated about mental health in all contexts of the law, not just in the context of professional ethics. Lawyers should have discretion to satisfy the requirement with any form of MH training.
Robert Baartlett	Licensed legal professional (Lawyer, LLLT, LPO)	This is not needed. There are too many CLE sub-requirements currently. It should be up to the attorney to decide what types of the 6 ethics credits they need. Stop the paternalistic behavior.
Heather Cantua Phillips	Licensed legal professional (Lawyer, LLLT, LPO)	
David Heiner	Licensed legal professional (Lawyer, LLLT, LPO)	The requirements to study particular ethics topics may be seen by lawyers as too prescriptive. Individual lawyers are in the best position to know which ethics topics are most important for them to learn about, give their practice, expertise, etc. The time of the MCLE Board would perhaps be better spent looking for ways to improve the quality of course offerings, particularly in ethics topics that the Board deems most important. A carrot rather than a stick . . .
Henry D Stegner	Licensed legal professional (Lawyer, LLLT, LPO)	I am a former law clerk with Washington Court of Appeals, Div. III, and I am licensed to practice law in Washington, Idaho, and California. I currently work as an associate attorney at Rogers Joseph O'Donnell in San Francisco. While the additional CLEs may be well-intentioned, I strongly discourage the committee from making these a mandatory requirement. Especially for out-of-state lawyers, this will create an additional administrative burden to seek out these specific Washington credits. I support any initiative that encourages these types of CLEs, but including it as a mandatory requirement creates a burden on Washington's lawyers. Anecdotally, I can tell you I already receive this type of training annually both in firm training and through other CLEs. Thank you for considering my comment.
Geoffrey Hulsey	Licensed legal professional (Lawyer, LLLT, LPO)	

Glade Kim Risenmay	Licensed legal professional (Lawyer, LLLT, LPO)	WSBA has already imposed too many types of ethics CLE requirements upon the members of the Bar.
George C. Rondeau, Jr.	Licensed legal professional (Lawyer, LLLT, LPO)	We do not need to impose a CLE requirement for every aspect of being a lawyer.
Andrew Marcuse	Licensed legal professional (Lawyer, LLLT, LPO)	I do not favor a proposal (1) to increase the number of required ethics credits, (2) to subdivide the ethics credit requirement into any further required subcategories, or (3) any proposal to do both (1) and (2). If I had a vote, I would vote "no" on the MCLE Board's proposed amendment to APR 11 regarding the same. Thank you.
Sarah Salgado	Licensed legal professional (Lawyer, LLLT, LPO)	
Greg Petrie	Licensed legal professional (Lawyer, LLLT, LPO)	Totally unnecessary. I think the attorneys can decide what areas are most useful to them for CLEs.
Erin Jackson	Licensed legal professional (Lawyer, LLLT, LPO)	
Joseph Edgell	Licensed legal professional (Lawyer, LLLT, LPO)	The CLE requirements area already too complicated and too onerous. Creating a bunch of categories and subcategories is overly complicated and unnecessary. I already have enough difficulty figuring out what categories I need to stay compliant and then find CLEs that meet the requirements at a price that I can afford (I am a government lawyer and my employer does NOT normally pay for my CLE). Frankly, as the requirements to practice get more and more difficult, it just pushes me to retire early and find something else to do. You really don't want to drive people away from government service, but that's what these out-of-touch additional regulatory proposals do. Not everyone works at a law firm with unlimited CLE budgets and people hired to help lawyers comply. This is just another example of how the WSBA is out of touch with its constituency. Let's apply the KISS principle here and keep it simple. Let the attorneys decide what categories they need and have only one ethics category.
Loreva Marie Preuss	Licensed legal professional (Lawyer, LLLT, LPO)	These proposed changes make the CLE requirements more onerous and prove that, once again, WSBA doesn't trust licensed attorneys in this state to know what kinds of CLEs we need. We are not idiots.
Timothy Barnes	Licensed legal professional (Lawyer, LLLT, LPO)	The CLE requirements are currently sufficiently costly and time consuming. Adding additional hours will do nothing to improve the preparedness of attorneys.
Ioulia Roussinova	Licensed legal professional (Lawyer, LLLT, LPO)	Increased burden on legal professionals who obtain similar credits through other CLEs.
Avrohom Feinstein	Licensed legal professional (Lawyer, LLLT, LPO)	

Nicholas Kiewik	Licensed legal professional (Lawyer, LLLT, LPO)	Many licensed legal professionals maintain practice and licensure that will rarely if ever overlap with the considerations of CLE-approved trainings in these areas. If the WSBA wishes to emphasize the importance of these topics, more training and education should be available as CLE-approved hours under the current CLE credit requirements. The WSBA sets a poor standard of by rapidly expanding CLE requirements into niche areas that are currently favored in public and organizational discussions. Expansion and specialization of credit requirements should be approached very conservatively with the benefit of data and documentation concerning interest and utilization of the proposed expansion topics. Many small office and solo-practice professionals already find that meeting CLE requirements can be difficult and even more so for mandatory ethics requirements. Creating more opportunity for interested practitioners to access resources in these areas while not creating new CLE credit requirements is the best means of populating this information to practitioners without increasing licensure burdens and setting a standard of hasty additions to those burdens.
Jeffrey Possinger	Licensed legal professional (Lawyer, LLLT, LPO)	It is a good idea to offer more opportunities for CLE Credit, and to expand those opportunities by making more topics available. But the penchant for the WSBA leadership in its various committees to take every "good idea" they stumble upon and then quickly move to make it mandatory is already too much. I am personally a strong advocate of attorney health and well-being – but creating even more requirements placed upon attorneys as is proposed here – is ironically going to have the opposite effect. I will add that I am always leery of any idea that is "so good you need to be forced to do it." To that end, my thoughts are that programs related to health and wellness (or variants on those themes) should qualify as "ethics credits" but allow our bar membership to make its own decisions about what programs they want to choose to satisfy their credit requirements.
Craig Larsen	Licensed legal professional (Lawyer, LLLT, LPO)	Concerned about adding more complexity to CLE requirements/reporting
WILLIAM MURPHY	Licensed legal professional (Lawyer, LLLT, LPO)	IF you increase ethics credits please reduce regular credits by the same amount
Joseph L. Mrstik	Licensed legal professional (Lawyer, LLLT, LPO)	Enough MCLE requirements already.

James S. Fitzgerald, WSBA No. 8426	Licensed legal professional (Lawyer, LLLT, LPO)	I have always substantially exceeded the number of required CLE hours, including those designated for ethics. I do this to gain knowledge in various areas. I believe the number of required CLE hours, including ethics hours, is sufficient. Those who care will do it anyway; those who do not will find a way to obtain credit without learning the substantive content. I support leaving the required hours and categories at current levels. Having ethics courses that focus in the four areas is fine and even desirable, but I do not believe it to be necessary to require as a rule change that courses be taken in each area. That should be up to the practitioner.
Jill Peitersen	Licensed legal professional (Lawyer, LLLT, LPO)	Lawyers' lives are filled with constant red tape and hurdles we must jump through, not only so that we can help ourselves, but also help the many others who turn to us for solutions in times of trouble, and after all of the INCREDIBLE AMOUNTS of BS we were forced to endure during COVID to assist our clients, the community, and still keep the court system's judges and administrators happy, your solution is TO ADD MORE RED TAPE to what we must do to remain lawyers. If I were one of you, sitting on this committee to figure out ways to HELP our WA bar members be better people and lawyers, I WOULD FIND A BETTER WAY.
Farid Piroozmandi	Licensed legal professional (Lawyer, LLLT, LPO)	Finding and completing Ethics CLEs has proven to be more difficult and more expensive than regular CLEs.
Jason Logan	Licensed legal professional (Lawyer, LLLT, LPO)	Youre making the whole thing too complicated to keep track of. Another 20 years we'll have 45 seperate caragories for the 45 credits. But most of you are probably too young to see that.

Sarah Nagae	Licensed legal professional (Lawyer, LLLT, LPO)	Adding these two additional categories of ethics requirements, thereby having four separate ethics categories, adds complexity that is not necessary. I prefer that you trust lawyers to choose ethics classes that are most pertinent to them. If a lawyer doesn't know as much about technology security, trust them to have awareness of that and take an appropriate course. Same with mental health. The MCLE requirements are complicated and confusing as it is; I don't think we need to make them even more so. As a separate note, the description "metal health ethics" doesn't seem accurate of the courses that we take involving mental health. "Mental health ethics" implies that a course would be about ethical issues involving mental health treatment (e.g., equality of patient access to metal health providers and treatment facilities, lawful decision-making by psychologists and psychiatrists, etc.) but what we're actually taking about are simply courses on the mental health and wellbeing of attorneys. For example, how to identify a mental health issue in yourself or a colleague, how to get treatment, when it may be affecting your practice, how to support your wellbeing and that of your co-workers, etc. These are classes that fit into the category of "ethics" (as opposed to "general practice") but aren't rightfully described as "mental health ethics." A better description would be "mental health and wellbeing," or something along those lines, even if the classes that fit that description do receive ethics credit.
Daniel Jones	Licensed legal professional (Lawyer, LLLT, LPO)	The WSBA already has one of the highest annual bar dues in the nation. Members still have to pay for CLEs, even those sponsored by the organization we belong to. What this amendment is really asking is 'can we get more money from our members by increasing the CLE requirements?' If this is an altruistic amendment seeking to really improve the legal profession and the practice of law it will come in the form of free CLEs sponsored by the WSBA. If you really want to improve the legal profession, the added CLE requirement should be on how to operate a client trust fund since that's what most attorneys get suspended or disbarred for.
James Danielson	Licensed legal professional (Lawyer, LLLT, LPO)	
Eric Jorgensen	Licensed legal professional (Lawyer, LLLT, LPO)	For non-practicing attorneys this is an additional burden we must satisfy. As a non-practicing attorney I will be forced to have to search for and pay out of pocket the cost of CLEs to meet this. In addition this will not improve the practice of law or the level of service to the public. I recommend offering more of these types of CLEs but not require this.
Michael J. Folise, Esq.	Licensed legal professional (Lawyer, LLLT, LPO)	Do not do. Too many licensing requirement as it is now.
Jack	Licensed legal professional (Lawyer, LLLT, LPO)	
Keith Thomson	Licensed legal professional (Lawyer, LLLT, LPO)	
Carnissa Lucas-Smith	Licensed legal professional (Lawyer, LLLT, LPO)	
Melisa Evangelos	Licensed legal professional (Lawyer, LLLT, LPO)	
Catherine Wright Smith	Licensed legal professional (Lawyer, LLLT, LPO)	Enough already with the subsidies for CLE providers. You used up all credibility on required CLEs with the "woke" policing!

Laura Schulman	Licensed legal professional (Lawyer, LLLT, LPO)	It would be wonderful for the WSBA to offer more CLEs on technology security and mental health ethics, but to increase the required hours and make these particular categories mandatory for all practitioners is excessive and unnecessary. First and foremost, there are a large number of attorneys for whom these topics are barely relevant. For example, government attorneys and attorneys at large firms with cybersecurity support would have no need for technology security training, and attorneys dealing with corporations and contracts would find mental health ethics courses only very tangentially relevant. These represent only a few examples, but even these few practice areas represent a large swath of attorneys for whom these requirements would simply engender resentment. It makes much more sense to make these more available to those who would find these topics relevant for their practice. It does not make sense for the WSBA, an organization which is supposed to support lawyers as professionals, to add more and more requirements so as to make CLE requirements onerous rather than edifying.
Frank Abramonte	Licensed legal professional (Lawyer, LLLT, LPO)	While requiring ethics CLEs in general is reasonable, creating sub-categories of "hurdles" to jump through will be cumbersome, and will not end with the four proposed categories (e.g., Oregon now requires Elder Abuse reporting CLE credit). While each individual instance is laudable, the micro-managing will not end.
Bonnie Stern Wasser	Licensed legal professional (Lawyer, LLLT, LPO)	These two topics are integral to law practice management. I would wrap them into any training required in that topic or related topics.
Andrekita Silva	Licensed legal professional (Lawyer, LLLT, LPO)	I have no issue with increasing the number of ethics credits that must be completed. I have a HUGE HUGE issue with the formation of subcategories and dictating how much is to be taken in each sub category. Please don't add these additional sub categories. Encourage presenters to address issues of mental health and technology security in their CLE if it is at all germane. Apart from that, if an attorney wants to know more in these areas, they can seek out CLE's in those areas and take them.
Chris Hydak	Licensed legal professional (Lawyer, LLLT, LPO)	These are superfluous and simply add to the complexity of maintaining a law degree. Unless there is a metric to measure something like "improvements in mental health outcomes" tethered to the CLE requirement, and a plan to sunset the CLE requirement if there is no improvement, then these should not be added merely in an effort to "do something."
Jason Kampman	Licensed legal professional (Lawyer, LLLT, LPO)	
Brian P Russell	Licensed legal professional (Lawyer, LLLT, LPO)	This should not be forced upon the membership.
Cathy Schulz	Licensed legal professional (Lawyer, LLLT, LPO)	If two more credits are being added, take away two from that same group. Remaining at six credits.

Thomas Boeder	Licensed legal professional (Lawyer, LLLT, LPO)	subdividing ethics CLE requirements into different subjects makes the whole CLE filing rules even more unreasonably burdensome - - the burden increased by the vagueness of these categories and challlenges to availability of CLE programs that fit these requirements while supplying truly useful training. Too much bureaucracy
Gary Andrews	Licensed legal professional (Lawyer, LLLT, LPO)	At some point, the WSBA needs to trust the attorney membership to utilize the CLE process to improve the competence of its members. Forcing each and every member to take rote, boring and, often, misguided programs fails everyone. As a mostly retired attorney of 45 years, I still do a number of mandatory arbitrations for the courts. Each year I question whether I continue to maintain my membership in the WSBA. Proposals like this will tip the balance toward resignation.
April Anderson	Licensed legal professional (Lawyer, LLLT, LPO)	I'm not in favor of adding additional ethics credits to CLE requirements, and I am not in favor of mandatory categories of ethics credits.
Virginia Clifford	Licensed legal professional (Lawyer, LLLT, LPO)	Just add those options in CLE offerings. Too many mandates already- this would just require more!
Ken Harer	Licensed legal professional (Lawyer, LLLT, LPO)	
Aaron Caplan	Licensed legal professional (Lawyer, LLLT, LPO)	While I agree all of the items are valid topics, I am not convinced that the added complexity to the CLE system is worth it. I think it would be better for WSBA to urge members to take things in these subjects, keeping the general pattern of voluntary choice among topics.
Jeanette Laffoon	Licensed legal professional (Lawyer, LLLT, LPO)	I have no problem with generally requiring CLE to stay current. This micro-managing of what you think we need to study is, however, over-reaching. Further, CLE companies charge as much as they can get away with, and this type of granular requirement allows them to do it. If this goes through, may I suggest that you provide a FREE on-demand, auto-reporting CLE class that covers all the specific ethics classes you deem necessary.
James M. Kasischke	Licensed legal professional (Lawyer, LLLT, LPO)	There is no academic proof that CLE positively aids the perceived problem. As an out of state attorney working for the Federal government, it is much more difficult to obtain CLE in specialized topics.
Ann Riedel-Thomas	Licensed legal professional (Lawyer, LLLT, LPO)	45 Credits every three years is ample education, with sufficient ethical credits! When choosing credits, let each legal professional continue to determine topics of interests, including technology/security, mental health, etc. I am weary of the WSBA/Board's "big brother" attitude.
Anna Bodi	Licensed legal professional (Lawyer, LLLT, LPO)	The MCLE Board is attempting to impose ever more specific CLE requirements on attorneys in the state. These requirements are bureaucratically burdensome rather than educational. While the Board may deem these topics important to attorneys in the state, it is overstepping to require all active attorneys in the state to meet ever more specific CLE requirements. The Board has not demonstrated how these additional requirements will benefit either attorneys or their clients.
Al Armstrong	Licensed legal professional (Lawyer, LLLT, LPO)	We are all adults here. WSBA, stop pretending that you are going to advance some great social goal with these increasingly preachy “ethics” requirements.
Christen Fairborn	Licensed legal professional (Lawyer, LLLT, LPO)	Please limit CLE burden

Steve Gross	Licensed legal professional (Lawyer, LLLT, LPO)	It is difficult enough to schedule CLEs. Adding specific area training only makes it more complicated and expensive for attorneys, especially sole practitioners, to comply with the requirements. It's this kind of micromanagement that in part is driving the push to have a non-mandatory bar, in my opinion.
Marion Leach	Licensed legal professional (Lawyer, LLLT, LPO)	It would be helpful to see the data indicating that we need further ethics credits in these areas. Do lawyers need more education regarding mental health or mental health ethics?
Deborah F Tofte	Licensed legal professional (Lawyer, LLLT, LPO)	From: Deborah Tofte (CW Title) <dtofte@CWTitle.net> Sent: Thursday, May 18, 2023 2:56 PM To: MCLE <MCLE@wsba.org> Subject: [External]New Amendment Please do not pass the Amendment. It is difficult enough to get the general Ethics Credits. It is very hard to find speakers on Ethics without having to get all those different types. It would only be feasible if WSBA provided free lunchbox webinars that cover each Ethics subject several different times during the year, so the LPO's could obtain the required MCLE credits. I think we need to trust our common sense and not make this a requirement. Going overboard in my opinion. Debbie Tofte LPO9684 and also an educational sponsor through NAPMW Seattle Puget Sound Association.

Miryam Gordon	Licensed legal professional (Lawyer, LLLT, LPO)	into more required tiny pieces. I am also concerned about that aspect. I don't know if it would make that significant amount of difference to try to focus ethics CLEs on several different areas of importance rather than as a block. However, having said that, cyber-security is an extremely important and looming issue for legal practitioners. I have tried to attend CLEs on this topic specifically in order to try to keep up with best practices. I don't know if having a requirement for an ethics CLE is important, because it could be added as a requirement under the general CLE grouping instead. I do believe it is pretty crucial for us to know what our "best" should look like to protect us and our clients. As for a mental health requirement, the report makes it clear that the requirement is based on fears of legal practitioners descending into substance abuse and mental health quandaries over time, but the wording of the proposal did not lead me to clearly understand that it was the mental health of the practitioner that was the focus as opposed to working with clients who turn out to have those issues. I would encourage - should the requirement pass - that the words be refined to be very clear who is at risk. But again, I do not think at all that a one-hour every-three-years requirement in this area is going to rescue, educate, or support practitioners who find themselves in this situation. If a new RPC were crafted for this reason, and perhaps a CLE created on changes to the RPCs, that makes some amount of sense. CLEs that include that rule in various ways could work well "sprinkled in" (as it were) to topics for which this makes sense. It would be better to simply create this rule and seed an awareness of the need for self-assessment periodically inside other required CLEs than to carve out a specific one-time hour. The departmentalization that seems to now be a new norm seems more like a
Richard P. Sybert	Licensed legal professional (Lawyer, LLLT, LPO)	I oppose MCLE generally. It accomplishes nothing except to enrich a cottage industry of providers. Further, I oppose the WSBA's attempts to, through specifying what topics must be covered, control what lawyers think and say. This is just Woke nonsense.
Leann Yang	Licensed legal professional (Lawyer, LLLT, LPO)	Ethics credits are already difficult to acquire, and this puts an additional burden on practitioners to get specialized CLE in very specialized fields, which are unnecessary.
Dylan R Cardoza	Licensed legal professional (Lawyer, LLLT, LPO)	
Stewart Feil	Licensed legal professional (Lawyer, LLLT, LPO)	If you want to make any random topics available as ethics credits that is fine. Requiring specific ethics credits in the three additional made up categories I disagree with. Not everyone needs mental health help. Not everyone needs cyber security training through the bar because they get it elsewhere. And NOBODY needs the equity courses you are offering. They are pure Marxist propaganda and have no place in legal ethics.
William Schaefer 40699	Licensed legal professional (Lawyer, LLLT, LPO)	Interesting subject matter. Just roll it into the General category. Keep it simple please.

Tamara Tissue	Licensed legal professional (Lawyer, LLLT, LPO)	
Lucinda S. Whaley	Licensed legal professional (Lawyer, LLLT, LPO)	Lawyers take a sufficient number of ethics credits currently. It is also important that lawyers stay current with the quickly changing substantive law.
Lisa Scott	Licensed legal professional (Lawyer, LLLT, LPO)	Please stop adding more and more arcane regulations to our CLE credit requirements. It is complicated enough to figure out the number and types of credits we need in the various categories. Most of us lawyers seek out courses that are suited to our practice areas and to keep up on the latest trends, so please let us decide. We do not need to be micro-managed any further. Thanks, Lisa Scott Attorney, Bellevue, WA
Kevin Fay	Licensed legal professional (Lawyer, LLLT, LPO)	Mental health is not an ethical obligation - there are lots of lawyers w/ depression who continue to provide excellent service to their clients. Member wellness absolutely is important; squeezing it into a *mandatory* program is not - plus an enormous waste of valuable time to those lawyers not afflicted. One hour for cybersecurity doesn't scratch the surface, and will likely devolve into a sales pitch for "approved" VPN, encryption, and cloud-storage products. For many lawyers - those in large firms, those who serve in-house to corporations, and those in government services - it would also be a waste of valuable time since these issues are dealt with on an organizational scale by others. Bottom line - the best of intentions do not make ideas good.
Wayne Lieb	Licensed legal professional (Lawyer, LLLT, LPO)	I am opposed to any additional mandatory categories of CLE. Practitioners should be able to determine what additional educational resources they need. Many times obtaining classes in the smaller categories is difficult.
All ethics programs should be a matter of choice and remain at a level of 6 hour per reporting period.	Licensed legal professional (Lawyer, LLLT, LPO)	See above.
Dee Knapp	Licensed legal professional (Lawyer, LLLT, LPO)	Although awareness of both tech security and mental health issues are important for attorneys, the proposal is confusing and unnecessary.
Marla Zink	Licensed legal professional (Lawyer, LLLT, LPO)	
Michael Vaughn	Licensed legal professional (Lawyer, LLLT, LPO)	I urge the Board not to pursue a rule which applies a one size fits all mentality to the diverse group of legal practitioners in our State. Let lawyers continue to decide what will best enrich and develop themselves and their careers, not mandate how they should think and what they should learn. This sort of paternalism may have a place in children's education, but it does not amongst educated adults. For some lawyers, these requirements may be beneficial, but for others they may be superfluous or inapplicable. It is better to let the practitioners decide for themselves what sorts of CLEs best suit their needs. Thank you for your time and consideration.
Kris Kuenzli	Licensed legal professional (Lawyer, LLLT, LPO)	

Patricia Michl	Licensed legal professional (Lawyer, LLLT, LPO)	Workgroup dated April 25, 2023. I am writing in opposition to the two proposed amendments to the APR 11 ethics requirement: technology security and mental health. First, these topics do not involve ethics. Ethics suggests moral issues such as veracity and honesty. Technology security refers to office management, not ethics. Mental health issues do not constitute ethics either. Mental health is a private medical matter between a patient and his/her doctor. The WSBA should refrain from bootstrapping these two topis into ethics because they do not fit that category. Second, technology security is a vast area and cannot be addressed by a one-hour credit every 3 years.* Lawyers are already highly motivated, without a mandated CLE, to seek knowledge in this area. Technology security should remain as an elective CLE. Third the WSBA does not qualify to mandate topics in the mental health field. The WSBA is a trade association rather than a medical association. Mental health is a private personal matter and should remain as an elective CLE. If the WSBA truly cared about the stress levels of Washington attorneys, it would simplify the CLE process rather than enlarge it, stay out of politics and social engineering, eliminate some of its programs, reduce its staff and lower its dues. In other words, the WSBA is part of the problem regarding the mental health levels of attorneys. Being forced to join an organization in order to practice law violates the First Amendment right to freedom of association. It also creates a monopoly by the WSBA which is a bad thing in any republic. The WSBA has become part of the nanny state with its constant social engineering,
Steven Meredith	Licensed legal professional (Lawyer, LLLT, LPO)	I am not in favor of increasing the number of credits required; however, I am not opposed to broadening what type of credits “count” for a reporting period. Alternatively, you could increase the ethics credits but decrease a corresponding amount of non-ethics credits. In sum, I do not favor making CLE compliance more burdensome for members of our bar.

LEE ROUSSEL	Licensed legal professional (Lawyer, LLLT, LPO)	A primary purpose of the WSBA should be protection of the public. In evaluating ethics courses, the MCLE Board should look to actual attorney misconduct and preventing it. WSBA disciplinary actions are the best data we have on attorney misconduct, and therefore the conduct ethics courses should address. Review of disciplinary violations reported in the bar journal indicates that the proposed amendment to APR 11 does not address common violations. Disciplinary cases indicate that most violations continue to occur in the area of diligence, timeliness, communication and finances. The more other mandates are piled on, the more attention would be diverted from these, which actually matter to clients. The background information is not persuasive, since it relies on general data or concerns (as with phishing) rather than specific facts or problems involving Washington attorneys. Finally, the Board, and indeed the WSBA, should treat Washington attorneys as adults and the professionals they are, able to make intelligent decisions about what courses they need in their personal circumstances
Raymond Bert Wilkins	Licensed legal professional (Lawyer, LLLT, LPO)	Ethics CLE credits are already more difficult to obtain than other CLE credits and increasing the number of credits and the various categories will make it harder for attorneys to obtain sufficient credits each reporting period. Instead of adding to the total number of Ethics credits and categories, the WSBA should allow attorneys to satisfy the Ethics CLE requirements with courses/presentations on data security and mental health awareness. In addition, many companies already require their employees to have period training on data and technology security, and these trainings may not meet the WSBA requirements requiring additional trainings to be done in to what the employer requires.
Julia Phillips	Licensed legal professional (Lawyer, LLLT, LPO)	too complex, keep as is

Why do you need this?	Licensed legal professional (Lawyer, LLLT, LPO)	I think we are adults. I understand the focus on mental health, but I don't think you need to add a bunch more legal education requirements to address it. You could just approve some courses in those areas so if someone wants to take them, they can and it will meet the over all requirements. We don't need to be babysat.
Mark J. Carroll	Licensed legal professional (Lawyer, LLLT, LPO)	
J. Powers	Licensed legal professional (Lawyer, LLLT, LPO)	Ease our burden. Do not create more.
Wendy	Licensed legal professional (Lawyer, LLLT, LPO)	I attend a wide range of CLEs already which include the proposed topics. There is no need to make the requirements more complicated. More categories means tracking and reporting becomes more complicated. Totally unnecessary and potentially more expensive for the BAR to administer.
Summer Stahl	Licensed legal professional (Lawyer, LLLT, LPO)	How many different “issues” are we going to have to take as ethics classes before everyone says “stop”. I appreciate that some attorneys have blinders on about certain subjects but I’m not sure taking ethics credits will change attitudes. This will require 2-3 classes per year on these topics. I’m sorry, but I just don’t see it doing what is desired. Thank you for all that you do for the Bar - including putting up with grumbling by members like me.
Sue Harwood	Licensed legal professional (Lawyer, LLLT, LPO)	I already get more than enough training in these topics at my job as a government employee. It's fine to offer ethics CLEs on these topics, but we shouldn't be forced to attend CLEs for which we already get plenty of training. Perhaps there could be an option for fulfilling such requirements by allowing credit for employer-offered training on these topics?
James Lake	Licensed legal professional (Lawyer, LLLT, LPO)	In 2019, WSBA CLE was directed to offer free CLEs in the topics of mental health ethics, technology security ethics, and equity. Presently, no free, live or on-demand courses appear in the CLE store for mental health ethics and technology security ethics and only one free course appears for equity ethics, being offered on only one day in 2023. Although four years have passed since the directive, obtaining CLE on these topics remains a financial burden.

Inez Petersen	Licensed legal professional (Lawyer, LLLT, LPO)	At least consumers can boycott Disney, Bud Light, Target, North Face and the like. But lawyers have no choice and no voice really when it comes to the WSBA going "woke." It is my opinion that the Bar's emphasis on CRT/DEI has turned it into a political action committee. Its goal is no longer professional in nature, it is purely political. Even news of attorney job openings is controlled by the Diversity Stakeholders. If an attorney does not belong, he/she (oops, am I using correct pronouns?), is not made privy of those job openings. And to hire a new person to head up more DEI within the WSBA is not a shock under the circumstances. But mission creep seems to fit the situation. Please make CLE credits optional for content that is political in nature. That goes for content which relates to technical skills or mental health too. My dream, of course, would be to make membership in the WSBA optional. Then those of us (probably a majority) who do not approve of the direction of the WSBA can divert our income to something other than dues and CLE's. (And don't get me started on what a money-making racket CLEs are.) If I might ask, how many WSBA employees and/or committees and woring groups are already working on Woke Part II--mandating that ESG become part of a lawyer's daily life? Inez Peteresen, WSBA #46213
Gerald R Neal (3323)	Licensed legal professional (Lawyer, LLLT, LPO)	Law students are advised to reject unsupported, biased, conclusory allegations. The members of the WSBA should follow this well advised principle. Supporters of Section (f) (8) appear to be unaware of the Human Rights Commission, RCW 49 60 030, 42 USC 1983, 42 USC 1988 and Section 1, Amendment XIV of the Constitution The above provisions clearly provide a remedy for proven discrimination, including injunctive relief and an award of fees and costs. The Bar Association should not allow a few members to force this highly political matter on the entire membership. At best, Section (f) (8) should be voluntary.

William L. Cameron	Licensed legal professional (Lawyer, LLLT, LPO)	best to not offend them. In this case that is likely to be impossible. If the reader finds the following offensive, the offense is no less than the offensiveness of APR 11(c). Thomas Sowell, an economist, has cogently pointed out, "One cannot be a physician or an attorney without a license, for the obvious reason that people without the requisite training and skill would be perpetrating a dangerous fraud if they sought to practice in these professions. However, once the government has a rationale for exercising a particular power, that power can be extended to other circumstances far removed from that rationale." Sowell, Thomas. Basic Economics (p. 264). Basic Books. Kindle Edition. The Bar Association has become a social service agency run by a coven of bureaucrats that justify their existence and expense with endless, suffocating regulation. I have two primary objections to APR 11(c) and these proposed changes. The first is that they are ill advised in that they are a waste of time and of no relevance to legal competency. The second is that they are the needless, bureaucratic restrictions on the time lawyers have for legal education in the first place. While it may be politically expedient to put up a front for the public to show lawyers are cleaning their own house, only a fool would believe that a couple of hours of instruction on maintaining your trust account would somehow ensure that lawyers do not commit burglaries, embezzle their clients' money or perjure themselves. You are honest or you are not. The Court should insist that lawyers be competent to practice law. A bar examination is good. We are not children or imbeciles and remain competent without prompting from niggling bureaucrats. People with 20 years of education can manage their professional competence without micromanagement. I have been using computers for word processing and legal research since the 1970's. I am not sure what anyone could tell me in an hour's time that I either do not already know or that would be useful. Attorneys in large firms are unlikely to be managing security, and solo practitioners are not likely to benefit from general computer security instructions. If Kaspersky can be hacked for years without knowing it, anyone with
Carla J. Higginson	Licensed legal professional (Lawyer, LLLT, LPO)	While these are important topics, the memo does not support the position that these are more important than other ethics topic, for example, trust account management, conflicts of interest, and succession planning. The solution to providing education on the topics proposed by the MCLE Board is by asking the WSBA to create appropriate outreach. The general ethics credits and general course requirements are being diluted by adding the proposed mandatory ethics topics. It also places a person's license at risk if they miss taking a specific course, and there seems to be an implication that attorneys and others will not care about mental health or technology issues unless they are forced to take courses in these areas. I suggest that this is not at all the case. Please do not move forward with this proposal.

Those Partially in Favor the MCLE Board's Preliminary Suggested Amendments		
Your Name	**Your relationship to WSBA**	**Comments and Feedback**
F. McNAMARA JARDINE	CLE Sponsor	In favor of th MH education requirement
seth rosenberg	Licensed legal professional (Lawyer, LLLT, LPO)	more technology. less mental health.
Owen Kilfoyle	Licensed legal professional (Lawyer, LLLT, LPO)	I agree with the requirements of the materials, but it should be taken from the general credits and not added onto the total.
Melissa Cunningham	Licensed legal professional (Lawyer, LLLT, LPO)	It is already quite challenging to meet the ethics credit requirement of 6. While I can see the value in these particular subject matter areas, I would be more in favor of allocating 2 out of the current 6 ethics credits to these specialties.
Cory Rein	Licensed legal professional (Lawyer, LLLT, LPO)	Seems fine so long as the attorney only has to satisfy the ethics portion using any combination of the 4 ethics categories?
Aaron Atkission	Licensed legal professional (Lawyer, LLLT, LPO)	
Alissa Harris	Licensed legal professional (Lawyer, LLLT, LPO)	I'd be in favor if it did not increase the total necessary credits.
Grace Huang	Licensed legal professional (Lawyer, LLLT, LPO)	For those not engaged in representation of clients this requirement should not apply. Especially if there are not abundant free credits on the topics available.
Jay Griffiths	Licensed legal professional (Lawyer, LLLT, LPO)	I'm in favor of the Technology Security Ethics credit, but do not have a strong opinion on the requirement for a mental health ethics credit. I certainly recognize the value that this could have for certain attorneys struggling with mental health or who know those who do, but I'm not sure it needs to be required. I also urge the Board to reconsider the required Equity credits. These are all reasonable credits for attorneys to obtain as a general ethics credit option, but shouldn't be specifically required given that they aren't directly related to the practice of law and just create new marketplaces for required seminars that are typically offered by non-practitioners.
Taryn Basauri	Licensed legal professional (Lawyer, LLLT, LPO)	Mental health and technology security are important issues that should be covered, but should not increase the overall credit requirement.
Nicole Tingelstad	Licensed legal professional (Lawyer, LLLT, LPO)	Ethics CLEs always seem difficult to come by. I don't mind the different types, but would prefer that they remain 6 in total, with one each of the 4 different types or 3 out of the 4 types/year. Otherwise, we at least need more of each type of CLE offered so it's not so difficult to come by/schedule. Or the same dang thing each year.
Don Marshall	Licensed legal professional (Lawyer, LLLT, LPO)	Increasing the number of hours of ethics required is OK as long as it does not increase the total number of hours required. Designating different categories of ethics required is unnecessary. Ethics is ethics. Let the lawyers decide which courses within that category they want to learn about

Judith Morton	Licensed legal professional (Lawyer, LLLT, LPO)	I'm in favor of providing this type of training and allowing them as ethics credits, but not making them mandatory. It's quite a bit to keep track of, and as a public service attorney, challenging to find free or low-cost CLEs to meet existing requirements.
Eva Luchini	Licensed legal professional (Lawyer, LLLT, LPO)	I'm in favor of it if these CLEs are provided free of charge by the WSBA.
Karen Forner	Licensed legal professional (Lawyer, LLLT, LPO)	I don't think social justice should be part of the Bar. The practice of law and the Board's support of same should be politically neutral. The "equity" change seems like a political stance. It ends up being divisive.
Jason J. Greene	Licensed legal professional (Lawyer, LLLT, LPO)	I am a solo litigator offering my services on a pro bono, low bono, and moderate means basis. I am in the trenches of the law and people's lives every single day. I have a very unhealthy work-life balance. CLEs, while I find some of them helpful, are already, frankly, a massive time burden. I am living the substance of CLEs every single day. I understand that some lawyers have the benefit of having admin time or 'down time' to do CLEs on their employers' clock. Not all of us have that benefit. Some of us are trying to keep the lights on and keep the wheels of justice turning. If you are going to add a required topic, please consider deducting it from the "general" CLE total credit requirement instead of requiring even more total credits. Thank you.
Tracey Czar	Licensed legal professional (Lawyer, LLLT, LPO)	I don't think it should add 2 credits. I like the idea of those categories and would support it being a part of the current credit requirements but not adding additional credit requirements.
Emily Guildner	Licensed legal professional (Lawyer, LLLT, LPO)	The credit requirements with specific category requirements feel a bit like micromanaging. While I think its a good idea to increase the ethics requirements, I'm not generally in favor of mandating specific categories as I believe it is our general responsibility to seek CLE credits in areas we need to improve or educate ourselves on.
Luke Sanders	Licensed legal professional (Lawyer, LLLT, LPO)	I would be in favor of adding such requirements, but only if they take the place of current requirements. I.e., if the CLEs are part of the current requirement number and not added on top. It does not make sense to add a Mental Health CLE and then add to our burden. It is counterproductive and borders on nonsensical to say to someone struggling with stress and mental health: "here's one more thing you need to do! Take this training on why your mental health is important!"
Ashley Langley	Licensed legal professional (Lawyer, LLLT, LPO)	I am in favor of the new credit requirements (i.e., one credit of Technology Security Ethics and one credit of Mental Health Ethics each reporting period). I am not in favor of increasing the total ethics credits required to 8 ethics credits.

Lance Farris	Licensed legal professional (Lawyer, LLLT, LPO)	I am in favor in principle but only on the condition that total credits are reduced proportionally; so that fewer general credits are required. I am not in favor if more total credits will be required.
Dylan Waits	Licensed legal professional (Lawyer, LLLT, LPO)	I am in favor of creating more ethics CLE requirements, but only if there are more free classes made available to help meet this new requirement and the total number of CLE credits is not increased.
Peter Nguyen	Licensed legal professional (Lawyer, LLLT, LPO)	Please clarify whether this rule would affect compliance with the submission of Comity Certificates from other states of licensure for attorneys.
Nikki Thompson	Licensed legal professional (Lawyer, LLLT, LPO)	Ok with the additional credit hours, but concerned about the specific requirements. Perhaps too much in the weeds.
Kaley Chan	Licensed legal professional (Lawyer, LLLT, LPO)	I'm in favor of adding these requirements, but not on top of the existing ethics CLE. Instead, I recommend incorporating these requirements into the current requirements - maintaining the same number of required ethics credits.
Peter Heineccius	Licensed legal professional (Lawyer, LLLT, LPO)	I am only in favor if the WSBA also provides free recorded webinars in these areas sufficient to meet the reporting requirements. It is already a challenge for some of us to meet our CLE requirements, and creating new specific categories makes it even more challenging to find affordable courses that work with our schedules.
Lauren Gersch	Licensed legal professional (Lawyer, LLLT, LPO)	In my experience, many members of the bar work in an organization that has technology security handled by their IT department. Requiring members to search out and take such an ethics class would be a burdensome requirement that would not enhance their practice of the law. If the law can be drafted in such a way that lawyers who work in an organization that conducts its own technology security, then I would be in favor of making this change.
sarah wixson	Licensed legal professional (Lawyer, LLLT, LPO)	It is sometimes difficult to get the required ethics, to get the different subspecies of ethics credits will be even more of a challenge.
Brenda Molner	Licensed legal professional (Lawyer, LLLT, LPO)	In favor of the one credit of Technology Security Ethics. Opposed to the additional proposed changes

Thomas R. McGarry	Licensed legal professional (Lawyer, LLLT, LPO)	The problem with Ethics CLE's is that there are not a lot of relevant opportunities to earn such credits in my view. I think Equity, Technology, and Mental health credits are a good idea in addition to general Ethics. How many times do attorneys realize they are short of ethics credit and desperately struggle to find credits regardless of how relevant the credits may be to the attorney/practice? If there were ample opportunities to earn MCLE ethics credits relevant to areas of practice at little or no cost to practitioners, I would strongly support the idea. Categorizing the types of required further makes finding relevant classes even more difficult. I believe attorneys will take any ethics MCLE class towards the end of the reporting period regardless of how useful the credits might be for a given are of practice just to be compliant without regard to actually learning anything useful.
K Unbehaun	Licensed legal professional (Lawyer, LLLT, LPO)	Wholly in favor if there are multiple opportunities for free CLEs on these additional topics. (WSBA already offers free mental health CLEs pretty regularly. Should not be too burdensome to offer a free technology CLE periodically.) Less in favor if practitioners must incur additional costs in fulfilling these additional requirements.
Rachael Ream	Licensed legal professional (Lawyer, LLLT, LPO)	I believe that the additional type of credit would be a positive addition, but it should not increase the total CLE requirement because it would be too burdensome. Further, these specialized credits are always the most difficult to obtain. The Bar should provide a free online version of making them mandatory.
Bob Casey	Licensed legal professional (Lawyer, LLLT, LPO)	Although I applaud ethics requirements, and maybe applaud increasing their overall number ... I think this proposal is too complicated. In don't think ethics should be subdivided into sub-categories that each has its own requirement. Just too complicated.
Holly Ferguson	Licensed legal professional (Lawyer, LLLT, LPO)	I think all lawyers should have training around mental health issues, but the topic of technology security ethics feels really specific. I'm in the K-12 legal world, and it's just not something that comes across my desk. I wonder about creating some sort of system where you need X credits per time period, split across at least 2 categories. Or even X credits per time period with at least Y in general ethics and the remainder spread across the other 3 categories. Requiring such technical credits when you're not working in the area I think results in people sitting through CLEs but doing something non-related just so they can check the box. I feel like the equity and mental health areas cover everyone regardless of what area you practice in. (In fact I had a great equity CLE on Friday!)

Lisa Feldman	Licensed legal professional (Lawyer, LLLT, LPO)	I understand encouraging these areas, but for those not working for a large private firm who pays for CLE classes, it could be challenging and unfairly expensive to earn these specialized credits. I think if the WSBA offered these for free on demand it would be reasonable.
Aaron Shawn Hicks	Licensed legal professional (Lawyer, LLLT, LPO)	I oppose the mental health CLE because one cannot fix their mental health by taking a CLE. I support the technology security credits because that topic must be learned from some source, and a CLE is a good source. I STRONGLY oppose the so-called "Equity" credits because they are racist, bigoted and forced speech.
C. Scott East	Licensed legal professional (Lawyer, LLLT, LPO)	1. I would not restrict ethics carryover credits so much. Allowing a max of 3 would be preferable. 2. My sense is that one should not be entitled to satisfy all General Ethics requirement with those upon which the current proposal is based. 3. Increasing the number of ethics credits required seems to me to be unduly burdensome despite the mitigation afforded by free online courses. If tall can be accessed at times other than scheduled for live presentations, that is okay (i.e., it may be the case but it didn't catch my eye on first pass.) Regardless, thanks to the committee for their efforts.
Matthew Mearns	Licensed legal professional (Lawyer, LLLT, LPO)	Mental Health ethics credits will not improve the mental health of the bar. This is a stressful profession steeped in a competitive culture of overwork. Lawyers are largely already aware of the mental health issues embedded in our profession. All this rule change does is create more hoops for lawyers to jump through to remain licensed and employed. If you want to protect lawyers' mental health, you have to do things like cap billable hours, and cap prosecutorial and criminal defense caseloads. The causes behind collective mental health decline are myriad, but the easiest fix now is to change how much we work. Until we have time (and for those of us in public service, money) to pay for therapy, telling us to get therapy will be as effective as repeating "work-life balance" over and over again without changing the culture that led us to need that (largely meaningless) phrase in the first place.

Amie Peters	Licensed legal professional (Lawyer, LLLT, LPO)	I am strongly in favor of the mental health credit. This is essential to increasing awareness about this important issue throughout the legal community. However, the technology security ethics issue is too narrowly focused to be useful as a repetitive MCLE credit. I worry this will amount to fear mongering from vendors, who are looking to make a buck and not properly addressing the appropriate Washington standards. It is also already covered under the current broad ethics topic and is regularly covered by the various MCLE vendors. Instead, I'd suggest an advisory MCLE ethics standard that recommends lawyers make sure to attend MCLEs on a diverse spectrum of topics, including technology security, advertising ..., as well as more traditional topics like communications, IOLTA accounts, etc.
John J. Ryan	Licensed legal professional (Lawyer, LLLT, LPO)	I am in support of educating lawyers on data security, especially with many older practitioners not as knowledgeable of risks and risk management with data. However, I am adamantly opposed to the "mental health" proposal. It appears to be a thinly veiled attempt to tell the public, "See, look what we are doing to make our lawyers aware of the mental health challenges inherent with the practice of law"! It is a window dressing at best.
Ondrea Hidley	Licensed legal professional (Lawyer, LLLT, LPO)	I like the idea of focusing on Technology Security and Mental Health but I do not think these should be added as additional credit requirements. Rather, I recommend they be part of the already required number of hours.

Christopher Britt	Licensed legal professional (Lawyer, LLLT, LPO)	Though I feel it is important to the profession, with regard to equity based ethics, I would like to state that I am not in favor of such ethical courses being required. Questions of equity are not a situation that most attorneys face on a regular basis. Prosecutors, guardians, or those who work on behalf or with government enforcement should have those trainings but those who work in real estate for the private citizenry, for instance, would have no such use and these rules should apply to most if not all attorneys. My feelings are identical for mental health ethics. Regarding technological ethics: it is apparent that technology is rapidly advancing and to the extent that all attorneys need ethical practice, this would be a welcome and refreshing change. In the pre-covid era, attorneys and judges often stated their distrust of technology and covid put the entire industry into a full sprint for things such as "docusign" and "e-filing" to gain traction and become commonplace. Providing direction BEFORE such matters become punishable is far more satisfying than to find out you are in technical violation of rules.
Larry Jefferson	Licensed legal professional (Lawyer, LLLT, LPO)	Not in favor of the mental health requirement. I think there many attorneys that do not practice in those areas, and it would be a waste of time and money.

Sara Beigh	Licensed legal professional (Lawyer, LLLT, LPO)	While I am supportive of addressing, and educating, legal professionals regarding behavioral health (that is inclusive of substanse abuse and mental health) issues, I believe this proposed amendment has issues with its wording and reasoning. First, the wording of the ethic credit and defintin should be Behavioral Health Ethics, as that is an umbrella of everything you are actually attempting to focus on. Second, your list of mental health disorders is a bit offensive, as you could just state mental health disorders (there are a lot of them). If you are not going to do that, you should at least group them all sequentially, and then put suicide prevention. Third, "The need to address these issues, and to do so as early as possible, relates directly to competence and fitness to practice law." This legitimately makes it sound like a person with a behvorial health disorder should be carefully monitored by their colleagues, because their fitness to practice law could be compromised at any moment. The bar moved away from requiring prospective attorneys with known behavioral health disorders from providing documentation and proving they were fit to practice law. Back when I joined the bar in 2004, it was a requirement. This just sounds like going back to the stigma, even though you state below that you are trying to destigmatize behavioral health issues. I would encourage you to at a minimum, change the name of the requirement to Behavioral Health Ethics. I would also encourage you to consider what you are asking for in the requirements of such a credit. It is important that we are fit to practice law, and we look out for our colleagues, but those with known behavioral health disorders should also not be made to feel like they are constantly being watched.
Charles Carter	Licensed legal professional (Lawyer, LLLT, LPO)	I support adding Technology security ethics as part of CLE. But hours requirement should not increase
David Billetdeaux	Licensed legal professional (Lawyer, LLLT, LPO)	While I agree that these are important areas for education, it will create a hardship for attorneys on the east side of the state, who already find it hard to locate affordable CLEs that are not based in Seattle. If the WSBA makes these trainings easily accessible via zoom/webex, then I have no isssue.
Kaustuv Mukul Das	Licensed legal professional (Lawyer, LLLT, LPO)	I am in favor of requiring one credit of Technology Security Ethics (with a commensurate change to the number of ethics credits to seven credits). I am not in favor of requiring one credit of Mental Health Ethics credits because (in light of the proposed definition of Mental Health Ethics in section (f)(10)) those topics are already covered - or should be covered -- in the five (5) general ethics and PR course materials. Note that I am relying on the existing definition of general ethics and PR and not the revised definition (which is, in my opinion, unnecessarily trying to carve out MHE courses).

Kassandra Zwick	Licensed legal professional (Lawyer, LLLT, LPO)	I really like the idea of adding ethics for mental health; but I dislike adding to the total required MCLE requirements.
Megan Muir	Licensed legal professional (Lawyer, LLLT, LPO)	The additional categories seem fine but I would be in favor only if the Bar Association was able to provide free or very low cost video-on-demand CLE sessions that met the various criteria. It is already more difficult to find relevant and inexpensive or free ethics credits than it is general legal credits. Particularly for those outside of large law firms, creating new requirements in subcategories creates new financial and timing challenges. If such CLE courses are readily available, free or very inexpensive, and accessible online via webcast (i.e., not at a specified time), then they seem to be valuable areas of education. Otherwise, perhaps adding those areas as eligible for credit within ordinary general legal CLEs could provide the education aspect without the challenges of new requirements.
Anamarie Marlow Maltzman	Licensed legal professional (Lawyer, LLLT, LPO)	I believe the topics are good additions and support them!!! I absolutely do NOT support adding additional hours to our requirements. Replace the new courses by deleting other hours requirements.
Kelly Mangiaracina	Licensed legal professional (Lawyer, LLLT, LPO)	I like the idea of the focused credits. I believe they should replace existing credits instead of being in addition to them.
Whitney Hawke	Licensed legal professional (Lawyer, LLLT, LPO)	I think the two (2) new ethics credits (tech security and mental health) are important, but I feel they should replace two (2) the general ethics credits rather than being added as additional credit requirements.
Katelyn Oldham	Licensed legal professional (Lawyer, LLLT, LPO)	I'm in favor of the MH ethics class because real harm to clients/the public can happen; I am not in for of the technology ethics b/c the potential for harm seems less significant & (most) lawyers seem to care about encryption and file sharing, etc. in a safe way
Kristina M. Ash	Licensed legal professional (Lawyer, LLLT, LPO)	I think that adding the categories and requiring security and mental health credits is fine, but it is difficult enough to get worthwhile ethics credits each year. I am strongly against increasing the total amount of ethics credits.
Wendy	Licensed legal professional (Lawyer, LLLT, LPO)	The continuing education requirements have become convoluted. I don't object to tech and mental health related education; but please note that these subjects are already offered and utilized because they fulfill our need to find new credits.
Patricia L. Morgan	Licensed legal professional (Lawyer, LLLT, LPO)	I am definitely in favor of the idea of the proposed mental health component. I am neutral due to lack of information, lack of knowledge of colleagues' impression, and lack of general knowledge on the technology component. I shall stay tuned.

Benjamin Keim	Licensed legal professional (Lawyer, LLLT, LPO)	I generally like the idea and understand the reasoning. However it adds complexity and one more thing for me to keep track when managing my CLE compliance. For now, I would prefer the additional at the requirements to be optional. It would also be helpful if the Bar could offer free CLE's on (2) equity ethics; (3) technology security ethics and (4) mental health ethics throughout the year.
Rebecca S. Stith	Licensed legal professional (Lawyer, LLLT, LPO)	I favor adding a mental-health ethics requirement. I am unclear as to what the technology-security ethics content would potentially be. Thank you.
Suzanne L MAGER	Licensed legal professional (Lawyer, LLLT, LPO)	I favor the amendments if the bar will make CLE credits readily available at no charge, preferably as online or recorded webinar CLEs that we can complete on our own schedules.
michael goldenkranz	Licensed legal professional (Lawyer, LLLT, LPO)	Ideally make all those ethics credits free, and if possible have some of them rolled into portions of substantive legal CLE's , so it's on stop shopping.
Katherine Krueger	Licensed legal professional (Lawyer, LLLT, LPO)	I suggest you modify it to say that those are not in practice advising clients but are simply maintaining their license as retirees (I waffle on this every year) do not have to take these. My only role now is to help some committees and nonprofits, of which I am on their board and have insurance through these, with bylaws and some contract review. Really minor. But I like the honor of being an attorney. I worked forit! Dont' want to drop the license. I am borderline income now and if you make these new one-hour classes among the free lunchbox ones, I can live with it. If I have to pay $100 or such for this one hour on each, I will be unhappy. Do your best. You get my point...
Larry Ward	Licensed legal professional (Lawyer, LLLT, LPO)	I support the amendment as to the technology security ethics component. I do not support the amendment as to mental health ethics - there is no need to remove that from the general ethics category.
Carey Campbell	Licensed legal professional (Lawyer, LLLT, LPO)	I believe that increasing information relating specifically to technology security and mental health is highly important but am worried abut the implementation of the mental heath ethics aspect. There is a connection from mental health and competence of practitioners but a tenuous one. While mental health information is highly important and the discussions need to occur relating it to an ethics requirement seems a little far afield from the underlying goal. The goal should not be talking about mental health only to the level of maintaining competence which is a relatively low standard. If the goal is to have more open and honest conversations regarding the mental health of practitioners including substance abuse then the a requirement can be that simple rather than trying to tie it to ethics credits.
Thomas Yamamoto	Licensed legal professional (Lawyer, LLLT, LPO)	In favor of categories. Not in favor of increasing total credit requirements.

Christine Chin	Licensed legal professional (Lawyer, LLLT, LPO)	The credits should be included in the current amount of ethics credits required per reporting period.
Karen Schweigert	Licensed legal professional (Lawyer, LLLT, LPO)	I support the technology security ethics proposal as a requirement, but not the rest. Those CLEs absolutely should be offered, and offering them for free would entice people to take them and take them seriously.
Victoria Thomas	Licensed legal professional (Lawyer, LLLT, LPO)	Suggesting less than 8 hours.
Lisa Keeler	Licensed legal professional (Lawyer, LLLT, LPO)	I'm in favor of more clear guidelines for ethics credits. I am not supportive of adding additional ethics credit requirements (increased number) as requiring 2 credits per year (6 per 3 year cycle) is both reasonable in providing education/guidance to lawyers and doable for lawyers. I'm not opposed to having very specific subject matter ethics credit requirements, but the requirements should be more explicitly clear, e.g.: required each 3 year reporting period to complete: 1 equity ethics credit, 1 technology security ethics credit, 1 mental health ethics credits, and 3 general ethics and professional responsibility credits. Also, it seems absurd to require ethics credits for "mental health ethics" as defined without actually meaningfully addressing why our system - the courts, the profession, the practice, etc. - is structured in such a way that continues to be, and is increasingly, detrimental to the health of professionals and without taking real steps to correct the same.
Meredith Lehr	Licensed legal professional (Lawyer, LLLT, LPO)	General ethics requirements are fine. "Equity" ethics are a bit of a reach, but okay. Has less to do with legal ethics and more to do with politics. Technology security ethics seems useful, given the changes in how information flows. Mental health ethics seems a real stretch. Is that really something we need to require attorneys to know?
Irina Anta	Licensed legal professional (Lawyer, LLLT, LPO)	I would be in favor of this amendment if WSBA provided ample opportunity to earn these credits for free during the 3 year CLE periods.
Sandi Shelton	Licensed legal professional (Lawyer, LLLT, LPO)	I am in favor of adding the subject areas as requirements, but NOT in favor of increasing the overall number of credits required.
Karen Duncan	Licensed legal professional (Lawyer, LLLT, LPO)	
PAUL PETRY	Licensed legal professional (Lawyer, LLLT, LPO)	I am in favor ONLY if it does not require the total of required credits to increase above the current 45. Perhaps the new categories could be substituted for "equity" credits.
Kaylynn WHat	Licensed legal professional (Lawyer, LLLT, LPO)	Regarding the technology credit - we have lots of internal training around IT security already, and I'd like that to count to fulfilling this requirement if adopted. Love adding mental health requirements.
Patrick D. Moore	Licensed legal professional (Lawyer, LLLT, LPO)	Should be two credits rather than one.

Susan Skelton	Licensed legal professional (Lawyer, LLLT, LPO)	I think I would want more information about the "mental health ethics" portion. I feel like there are already so many requirements on attorneys.
Cynthia Cannon	Licensed legal professional (Lawyer, LLLT, LPO)	I understand the push for ethics CLE on tech security and mental health. My only objection is requiring more and specific ethics credits where there's a dearth of general ethics credits on offer. This requirement would add the burden of finding (and paying for) CLE seminars/courses for tech security and mental health.
Juliet Laycoe	Licensed legal professional (Lawyer, LLLT, LPO)	I am supportive of ethics credits that are focused on a particular topic or issue but not in favor of increasing the number of ethic credits required each reporting period to 8.
Vanessa D Morgan	Licensed legal professional (Lawyer, LLLT, LPO)	Does this increase the total number of CLE's required or adjust the allocation of total credits? Regarding equity ethics, the education classes to be made available need to address all inequality, whether based on sex, sexual orientation, ethnicity, heritage, etc. As an example, a "white" person my legally qualify as a minority due to ethnicity, the color of ones skin or a family name does not tell the full story, which also needs to be addressed in equity. I believe cost also needs to be examined. For many LLLT's and LPO's courses can be cost prohibitive when cut backs occur and it may be necessary to put a license on inactive and then re-activate. Thank you for your time.
Morgan Adams	Licensed legal professional (Lawyer, LLLT, LPO)	I certainly think a one time CLE requirement is helpful, even beneficial. I don't think it should be annual. Much of this appears to be specialized and isn't something that all lawyers will need for each reporting period. There are costs in time as money as well. Once a lawyer is alerted to the resources, the lawyer should then be sufficient to explore further or dust of the books and update. Of course some will never get it and some already know it.
Laura Johnson	Licensed legal professional (Lawyer, LLLT, LPO)	If these are the same requirements as a Lawyer? Then I would say yes. We see more attorneys who do not follow secure and safe procedures under technology security efforts. The Escrow industry is constantly updating their training on these issues.
Charity Atchison	Licensed legal professional (Lawyer, LLLT, LPO)	I support this if the credits are provided free through the bar association. I have concerns about a mental health ethics credit. Lawyers working for the government should be allowed to substitute the mandatory technology training for technology requirements.
Alejandro Monarrez	Licensed legal professional (Lawyer, LLLT, LPO)	If we want to add the two proposed ethics credits, then eliminate two previously required ethics credits. We should not be increasing CLEs but rather finding ways to reduce where possible on the basis of value.
Melissa	Licensed legal professional (Lawyer, LLLT, LPO)	Not in favor of the Technology segment. It doesn't make sense for In-House attorneys, of which there are many in Seattle. I am in favor of the Mental health section because that affects all attorneys.

Martin Sinclair	Licensed legal professional (Lawyer, LLLT, LPO)	I am neutral regarding the amendment, provided it does not increase the overall CLE requirement above the current 45/3yrs - the transmission email was unclear.
Charles Matthew Andersen	Licensed legal professional (Lawyer, LLLT, LPO)	The concept seems worthy and well intended. The difficulty will be implantation. It is very difficult to obtain ethics credits with CLE's. Making the ethic credits specialized will impose an almost impossible burden on a practitioner to obtain these credits. It is not easy to weave the new ethic topics into more discrete CLE's that most seasoned practitioners attend to refresh in their practice area versus more generalized cover the waterfront CLEs. If this proposal is to be pursued, it would be incumbent that the WSBA sponsors at a minimal, or no cost, and available by zoom attendance/taped each of these specialities on a very regular basis. A jumbo program with all of the required specialties should be offered once a quarter to meet the obligation would seem to be necessary.
Stephen Fredrickson	Licensed legal professional (Lawyer, LLLT, LPO)	I'm not opposed to adding these two new ethics requirements. However, I think required ethics credits should be maintained at six. Practitioners are obviously free to exceed six if they wish.
Katherine Matos	Licensed legal professional (Lawyer, LLLT, LPO)	I appreciate the intent behind the suggested amendment, but disagree with the structure. Most jurisdictions require an average 12 credits per year; increasing the total credit requirements would make Washington a further outlier. Most jurisdictions have two categories (ethics and other); creating five distinct categorical requirements is difficult to both track and find quality CLE options.
Dale Steinbach	Licensed legal professional (Lawyer, LLLT, LPO)	I am in favor of any expansion concerning mental health within the profession, both with respect to ourselves in the practice or legal community for our non-practicing members, such as myself, and with our obligations to be aware of mental health concerns in representation and advocacy. I do not feel it is necessary to add a special category of technology ethics. To the current continuing legal education requirements as current ethics credit structures under the six credit model provide an adequate number of technology and communication related subtopics. That I think I already serve the profession adequately.
Leland L. Bull, Jr.	Licensed legal professional (Lawyer, LLLT, LPO)	Having read the MCLE Board's report, I find that the proposal may unnecessarily complicate the acquisition of the required ethics hours, and I wonder where and how members will be able to acquire these individual required credits, unless the programs are permanently posted on and available from the MCLE programs for downloading. If these programs ARE INDIVIDUALLY AVAILABLE for downloading from the MCLE menu without cost to the membership, I would have no objection to the proposal.

M. Reinhardt	Licensed legal professional (Lawyer, LLLT, LPO)	Both topics are important. Since I have completed my required CLE hours for this reporting period, I believe any new requirement should only be implemented for future reporting periods.
Michele Moore	Licensed legal professional (Lawyer, LLLT, LPO)	I think the new categories are all wonderful topics to include as part of our continuing education. However, it is already difficult to obtain the category-specific credits, and I anticipate that two new categories will make it even more so. Is there any way to make them a rotating requirement? For example, two categories in one reporting period and two in the next or allowing attorneys to choose two (or even three) of the four categories? In general, I think it would be a good idea to require even more credit hours in the ethics category, maybe 10 instead of what is now required.
Jennifer Anderson	Licensed legal professional (Lawyer, LLLT, LPO)	Getting enough ethics credits is already difficult. I wouldn't object to new areas of emphasis and think technology ethics is especially relevant, but I think increasing the required number of ethics credits is a bad idea.
douglas tufts	Licensed legal professional (Lawyer, LLLT, LPO)	Have to provide those subjects often and make them readily available. They are all important. Thank you doug
Joshua Rosen	Licensed legal professional (Lawyer, LLLT, LPO)	

David Shirk	Licensed legal professional (Lawyer, LLLT, LPO)	I am barred in 10 states so I may have a different perspective than many. I am curious how this will affect Oregon and Idaho MCLE comity. Several other states have added mental health requirements but generally fall within their own categories, distinct from ethics. Ethics & Professional Responsibilities in every state have similar specific requirements to distinguish them from general courses. But that doesn't mean all specific courses must be ethics courses. Creating sub categories under ethics complicates course classification for persons barred in multiple states. New and additional requirements are not a problem and having knowledge of tech security may be an ethical requirement of all lawyers but I see no value in declaring Tech Security and Mental Health to be Ethics courses. Every individual and business should learn about tech security and there are many excellent Tech Security courses that don't have a legal ethics element. But many are likely more valuable to an attorney than any MCLE course I have ever taken. Washington should allow attorneys to get credit for taking quality classes on data security without requiring the course to include attorney ethics because learning about data security fulfills those ethics. Let existing ethics courses cover that aspect. Otherwise attorneys with an extensive tech background will be wasting time in elementary courses and average attorneys will be discouraged from really learning about data security because they have to take one dumbed down to satisfy attorney ethics elements.
Alex Bezu	Licensed legal professional (Lawyer, LLLT, LPO)	In favor of Technology Security Ethics credit only.
Yasmeen Abdullah	Licensed legal professional (Lawyer, LLLT, LPO)	CLE are already very expensive and it is difficult to find ones in specific areas that are not cost prohibitive, especially for those of us providing sliding fees and pro bono work. I am in favor of the amendment only if the WSBA provides annual technology security ethics; and mental health ethics CLEs free of charge to legal professionals.
Karen Nelson	Licensed legal professional (Lawyer, LLLT, LPO)	Most of my CLE comes from national (multistate) conferences on health law, and these new requirements would be quite state-specific and hard to fulfill. I would not expect a national ethics speaker to cover them. Unless WSBA is planning to offer many opportunities to take qualifying CLE sessions at a low cost to members, it could create a substantial duplication of effort and expense.

Lesley Morgan	Licensed legal professional (Lawyer, LLLT, LPO)	I would only be in favor of this suggested amendment if WSBA provides this kind of ethics CLE during its Legal Lunchbox series annually. If that is assured to happen, I would be fine with this change.
Alan Singer	Licensed legal professional (Lawyer, LLLT, LPO)	As to the mental health CLE, it should only be free if required, and WSBA should probably take the lead. It is well financed by member dollars, aware of the issue, and offers good quality CLEs, so would probably be best situated to offer a required mental health CLE.
Jennifer Dold	Licensed legal professional (Lawyer, LLLT, LPO)	I support the additional topics, but do not increase the required amount to 8 per reporting period. Include them in the required 6. Thank you.
Pamela Visco	Licensed legal professional (Lawyer, LLLT, LPO)	I think it is a lot of ethics. I think computer security should not be an ethics credit. But it should be required. I also think equity and mental health are not ethics credit. But they should be required CLE materials for attorneys. As a public defender, I take a ton of equity and mental health CLES and educational opportunities. But I do not see how they are ethics related but more a general education credit that could be added to requirement.
Elizabeth R Devine	Licensed legal professional (Lawyer, LLLT, LPO)	Lawyers with dual licensure, such as medical professionals and social workers, should be able to use ethics credits from those professions to meet the WSBA requirements.
Christy Newman	Licensed legal professional (Lawyer, LLLT, LPO)	I think you should simply require that of the 6 you already owe that 1 shall be for technology security and one for mental health.
John McCrady	Licensed legal professional (Lawyer, LLLT, LPO)	I am in opposition to the idea that the WSBA, an organization that I am required to belong to, is requiring me to also subject myself to presentations on equity ethics, which is a subject matter fraught with political, philosophical, and even religious implications. The material is never taught from a neutral viewpoint, never as a matter for debate, but is always taught with the implicit expectation that we all concede the truth of the material presented and agree to comply with every dictate set forth.
Aaron Paker	Licensed legal professional (Lawyer, LLLT, LPO)	Good ethics CLEs are hard to find (defined as relevant to my practice and presented in a way that does more than let me check the box). If this change happens, there has to be better offerings available or I need someone to show me where the good ones are. I love the addition of the mental health ethics, one of my pet areas of concern, but I have been really disappointed in the offerings so far.

Robert Cumbow	Licensed legal professional (Lawyer, LLLT, LPO)	The change does not look especially burdensome but it does place increasing responsibility on the shoulders of licensed professionals to make sure they are satisfying each of these requirements. The longer the list gets, the more likely that someone acting diligently and in good faith will still overlook one of the required credits, or assume it's been satisfied when it hasn't. Can the change be accompanied by increased diligence on the part of WSBA-MCLE to monitor and warn professionals if they have not satisfied one of the new ethical category requirements as they near the end of a reporting period?
Amber Leaders	Licensed legal professional (Lawyer, LLLT, LPO)	I am generally supportive, particularly on mental health ethics. But I do worry about the availability of these credits to the entire bar. Both are highly specialized and will have a limited number of trainers available to do these programs well and accurately. What will WSBA be doing to ensure there are sufficient quality trainings available to meet these requirements?
Caroline Campbell	Licensed legal professional (Lawyer, LLLT, LPO)	Add suggested CLEs, but do not increase the total CLE credit requirement.
Angela Mercedes Escobar Min	Licensed legal professional (Lawyer, LLLT, LPO)	While I see the benefit of adding credits in these areas, CLE obligations are already comparatively higher in WA versus other states (e.g., NY) and there's already enough splicing of different credit categories. That said, I do believe both areas are important for legal professionals' development, so my preference would be that these be made optional and recommended credit areas, with programming facilitated by WSBA at a reduced cost and evaluation of compliance to be assessed by WSBA in subsequent years. Thank you for considering.
Rajeev Majumdar	Licensed legal professional (Lawyer, LLLT, LPO)	I would be in complete favor of this IF the WSBA was producing and providing to its members a free on demand CLE course on each topic each year. That way we are creating mandates that can be achieved and ensuring an avenue any member can use to fulfill and be educated. Thus would ultimately benefit the profession and the public.
Erin Egan	Licensed legal professional (Lawyer, LLLT, LPO)	My concern is the availability and affordability of classes to meet these requirements.
Declined to provide	Licensed legal professional (Lawyer, LLLT, LPO)	I appreciate the importance of mental health, but I don't think it's appropriate to include as a professional licensing requirement.
Dean Prather	Licensed legal professional (Lawyer, LLLT, LPO)	We already have enough CLE credit requirements. If we have to add more subjects, then trim from others to keep the credit requirement the same.
Eriko Iwasaki Baxter	Licensed legal professional (Lawyer, LLLT, LPO)	If the proposed changes are made, I would like to request the WSBA to provide free CLEs (both live and recorded CLEs) relevant to these topics for all WA lawyers.
Sarah Hudson	Licensed legal professional (Lawyer, LLLT, LPO)	

Elliott Johnson	Licensed legal professional (Lawyer, LLLT, LPO)	Requiring specific areas of Ethics CLE isn't objectionable. Adding to the overall number of Ethics hours (from 6 to 8) is objectionable. Have you done an overall cost/time analysis? How much extra $ will this cost the entirety of the legal populace who must add two hours to their CLEs? Just keep the number of hours at 6 Ethics hours.
James McGuire	Licensed legal professional (Lawyer, LLLT, LPO)	Design CLEs to always include all categories of ethics requirements; this will make compliance and tracking easier
Alissa Baier	Licensed legal professional (Lawyer, LLLT, LPO)	Only in favor of this amendment if enough free CLEs will be offered to provide options for professionals to meet these requirements.
Christine Camper	Licensed legal professional (Lawyer, LLLT, LPO)	I don't disagree with having some requirements for the additional specified ethics, however I do not agree with the amount for each. I have concerns about the availability of CLE's that would provide sufficient ability to meet the requirements that are not largely repetitive and/or take away from other education. I would request to reduce both technology security and mental health to 2 each.
Amanda Ullrich	Licensed legal professional (Lawyer, LLLT, LPO)	To be honest, a lot of the MCLEs are pointless. We are all over worked and often struggle to keep up. I absolutely think technology and mental health need to be part of our continuing education. It should or could actually be a larger part of the MCLEs as could DEI education. I would make those topics a larger part of the requirements and reduce other areas.
Samuel Terpstra	Licensed legal professional (Lawyer, LLLT, LPO)	I honestly don't care what changes you want to make. Make 100 categories if you think it will make better lawyers. All I request is that you spend some of my annual fees to provide 100% free access to CLE credits. Take a survey - I'd be willing to bet 90% of Washington lawyers like me get nothing from our bar membership besides access to practice, yet we have some of the highest fees in the country.
Damian NoOneElse	Licensed legal professional (Lawyer, LLLT, LPO)	I support the addition of Technology Security Ethics MCLE requirements. I do not, however, support the "Mental Health Ethics" requirement because I think a single ethics credit requirement is a shallow, ineffective, and performative gesture for an issue that should be taken more seriously. I would support a more thoughtful and robust requirements for both "Equity Ethics" and "Mental Health Ethics."

Lee Thorson	Licensed legal professional (Lawyer, LLLT, LPO)	I don't have a problem with adding the proposed specialized ethics topics, but I don't believe that any of the enumerated specialty topics areas are changing with such rapidity that they justify a required (and likely redundant) program each credit period. If the Board feels that they have to be mandated rather than simply offered as options, then I suggest that the general ethics and professional continue to be required annually, but mandate only that each Bar member must also take a program in each of the three specialty ethics areas at least once during each five year period.
Richard J. Gregorek	Licensed legal professional (Lawyer, LLLT, LPO)	I am in favor of adding the requirement for the two areas, however I see no need to increase the number of CE credits needed. These can just be required within the existing CE credits. For instance for Ethics requirements the credits must include the new topic courses available. The financial well being of small law firms is always tenuous and the adsditional cost and time away from the practice is not warranted.
Dan Bridges	Licensed legal professional (Lawyer, LLLT, LPO)	The "Technology Security Ethics" part seems fine given the state of tech. However, I am very opposed to a "Mental health ethics" requirement. Particularly as you don't even have the proposal on the web site. Really? Come on guys. I went there to read it, and you do not even have what you are proposing. all it does is link us to the more recent CLE on telling us all we are implicitly racist. How can you send an email out to all of the members to comment on a proposed rule, give us a link to go look at the proposed rule, and not even have the proposed rule there. :-) Assuming you are wanting me to take ethics on my mental health or somebody else's, that has nothing to do with the practice of law any more than requiring us to pay more taxes as a part of our license to pay for better roads. Does having good mental health make you a better lawyer? Yes. Does having better roads make it easier to get to the courthouse and therefore make justice more accessible. Yes. Is there a point where the linkage between licensing lawyers to every possible thing that affects lawyers or the justice system go outside of the scope of regulating lawyers. Yes. Please folks. I love you and our mission please stop legislating morality via ethics cles. thanks folks. Take care, Dan

Molly Masich	Licensed legal professional (Lawyer, LLLT, LPO)	If the proposed ethics category CLE requirements are approved, WSBA should provide *FREE* CLEs to specifically target these new required ethics categories. They are highly specific and will be hard to complete without CLEs specifically targeted toward them. We pay A LOT for our annual WSBA membership, which is mandatory to practice. The WSBA should provide FREE CLEs that fulfill the increasingly compartmentalized ethics categories.
Michael J. Bond	Licensed legal professional (Lawyer, LLLT, LPO)	I object to this proposed amendment: ... (8) Equity ethics, defined as subjects relating to equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law; This amendment advances the false claims that our profession works in a systemically racist environment, that notions of merit based achievements are white supremacist, that one is either oppressor or oppressed, that anti-racism is the antidote, and that those who dissent are unfit.
Cat Zavis	Licensed legal professional (Lawyer, LLLT, LPO)	I am in support of the ethics requirement for Mental Health and opposed to the one for technology security. For some legal professionals, that is not as relevant as for others and it just adds another burden and hoop for people to jump through. If people need that information to ensure the security of their practices, they will take such courses. On the other hand, many people do not consider and/or not aware of the importance of mental health issues in their practice so I do think that should be required.
Ronald Lau	Licensed legal professional (Lawyer, LLLT, LPO)	I'm licensed in other states (CA and NY) which require these courses already. My only ask is to make CLEs flexible such that lawyers who are admitted in other states can take 1 CLE that will satisfy the same requirement with other states. Otherwise, this proposal will add more requirements and hours for attorneys.
Rachel	Licensed legal professional (Lawyer, LLLT, LPO)	I agree that the proposed new subject matters are timely and important. Respectfully, however, I don't like the superimposition of two additional credit hours. I would more likely be in favor of this suggested amendment if these courses were offered in lieu of two credits of another, current ethics requirement.
Julie Anne Brown	Licensed legal professional (Lawyer, LLLT, LPO)	I think the ethics credit requirement should remain the same. Lawyers should be given the choice of the four categories but only required to take ethics course in at least two (2) categories per reporting period (not all four). I think requiring all four is too much and does not allow lawyers to focus on the areas upon which they believe they need training. I am not in favor of increasing the number of credits required past 45 per three (3) year reporting period.

Ruth Harper	Licensed legal professional (Lawyer, LLLT, LPO)	I like the idea of Technology Security Ethics and Mental Health Ethics but do not think that these credits should be added in addition to the rest of the MCLE credits required. This places too heavy a burden on small and solo practitioners, who are already trying to run a business, manage client matters, etc. Technology Security Ethics and/or Mental Health Ethics CLEs should be added as options of categories that count toward the overall CLE credit requirement.
Alison DeGregorio	Licensed legal professional (Lawyer, LLLT, LPO)	
Todd Maiden	Licensed legal professional (Lawyer, LLLT, LPO)	I am not opposed to periodically requiring practitioners to receive CLE training in technology security and / or mental health - both are important subjects. However, I do not think the total number of CLE hours should be raised. Thank you.
Stephanie Caballero	Licensed legal professional (Lawyer, LLLT, LPO)	As long as it remains free of cost I have no objections to the change and it may be a great learning opportunity.
Cassandra Baker	Licensed legal professional (Lawyer, LLLT, LPO)	I support the technology security credit requirement. Technological security has major implications for confidentiality, and lawyers should be more aware of these issues. I do not support the mental health credit requirement. While I appreciate that WSBA is concerned with lawyers' mental health, I do not think a CLE credit requirement is the right way to address the issue. First, I believe health management and health education should be between an individual and their medical providers. Second, I do not believe requiring CLE credits will improve lawyers' mental health. I believe overwork is the main source of work-related mental health issues for lawyers, and a CLE requirement will not address that. To the extent that other mental health conditions such as depression and schizophrenia (to name two listed in the proposed amendment) affect a lawyer's work performance, those conditions should be managed by the lawyer and their medical providers. I think it would be more productive for WSBA to make resources available but optional, and to advocate for a change in the culture of the profession to promote sustainable workweeks that give lawyers time to attend to their mental and physical health and have a life outside of work.

Victoria Barr	Licensed legal professional (Lawyer, LLLT, LPO)	The carryover provisions are confusing, but the section quoted below must be edited for clarity. I would be happy to wrestle with it if asked to do so: (10) Mental health ethics, defined as subjects that educate and inform lawyers, LLLTs, or LPOs about their ethical obligations and professional responsibilities under the rules of professional conduct regarding mental health issues. This includes education concerning the ethical risks to the practice of law associated with, but not treatment for, substance abuse, addictive behaviors, stress management, work-life balance, anxiety disorders, depression, bipolar disorder, suicide prevention, schizophrenia, and other mental health issues.
Kari Petrasek	Licensed legal professional (Lawyer, LLLT, LPO)	I do not believe it's necessary to have a mental health ethics requirement. I do not support this suggestion.
Michael Cherry	Licensed legal professional (Lawyer, LLLT, LPO)	I believe instead of Technology Security Ethics, the title should be broader such as Technology Compliance and Ethics, as Security is but one aspect--ethics attaches to technology as security, privacy, data retention and usage policies, government regulations (including Foreign Corrupt Practices Act), etc. and therefore, the title and the potential coverage should be broader.
Barbara Prowant	Member of the public	In favor of Technology Security Ethics. Not in favor of Mental Health Ethics.
Gerald F Roach	Licensed legal professional (Lawyer, LLLT, LPO)	
Tom Brotherton	Licensed legal professional (Lawyer, LLLT, LPO)	I agree that improving the lawyer's understanding of the changing information technology environment is important. I disagree that the rest of the suggestions are needed or useful.
Chris Morgan-Riess	Licensed legal professional (Lawyer, LLLT, LPO)	More would need to be done to ensure that classes meeting these requirements are available outside the state for those of us not in WA.
Rebecca Lynne Bernard	Licensed legal professional (Lawyer, LLLT, LPO)	I question the wisdom of making ethics increasingly complex. Perhaps the WSBA should give out to attorneys an explanation for why this amendment has become necessary.
Soheila F Sarrafan	Licensed legal professional (Lawyer, LLLT, LPO)	Technology Security Ethics is something that can be taught and understood. It is unclear what "Mental Health Ethics" actually means and how it would contribute to a more ethical practice of law; so not in favor of Mental Health Ethics requirement.
Craig McDonald	Licensed legal professional (Lawyer, LLLT, LPO)	The amendments are great ideas but keeping track of it all gets complicated for me

Those in Favor the MCLE Board's Preliminary Suggested Amendments		
Your Name	**Your relationship to WSBA**	**Comments and Feedback**
Alexandra Kory	Licensed legal professional (Lawyer, LLLT, LPO)	
Shelly Buchanan	Licensed legal professional (Lawyer, LLLT, LPO)	
Dianna Caley	Licensed legal professional (Lawyer, LLLT, LPO)	
Thomas Butcher	Licensed legal professional (Lawyer, LLLT, LPO)	Mental health should definitely be a requirement and I would support 2-5 credit requirements for this portion. With regard to technology requirement -- 1-3 credits seems appropriate.
Heather Shepherd	Licensed legal professional (Lawyer, LLLT, LPO)	I think technology security and mental health would be great to add to the requirements. I believe there are a lot of practicing attorneys that lack in both of these areas.
Bella Maslyak	Licensed legal professional (Lawyer, LLLT, LPO)	
Jonathan James	Licensed legal professional (Lawyer, LLLT, LPO)	
Jeff Grinnell	Licensed legal professional (Lawyer, LLLT, LPO)	The more content that pertains to all lawyers the better.
Michael Hallas	Licensed legal professional (Lawyer, LLLT, LPO)	Technology security is essential to practice of law and protecting client confidential information, attorney client communications and work product. Too many lawyers, including myself at times, don't think enough about it.
Kait Schilling	Licensed legal professional (Lawyer, LLLT, LPO)	
Suzanne Long	Licensed legal professional (Lawyer, LLLT, LPO)	
Maria Manza	Licensed legal professional (Lawyer, LLLT, LPO)	
Joan Pradhan	Licensed legal professional (Lawyer, LLLT, LPO)	
Adam Tabor	Licensed legal professional (Lawyer, LLLT, LPO)	
Jerica Wilson	Licensed legal professional (Lawyer, LLLT, LPO)	I think with advancing technology and hacking of private information this is very important to learn. As well, mental health is something that should be nurtured. This is a great amendment.
Julie Mayer	Licensed legal professional (Lawyer, LLLT, LPO)	
Wendy S. Neal	Licensed legal professional (Lawyer, LLLT, LPO)	
Danny Reidy	Attorney	Mental health issues in the legal profession should not be ignored. Lawyers would benefit from this training.
Synova M. L. Edwards	Licensed legal professional (Lawyer, LLLT, LPO)	I think it's great to ensure that legal professionals get well rounded continuing education.
Shauny L Jaine	Licensed legal professional (Lawyer, LLLT, LPO)	This is a welcome change. Thank you; I hope it is approved.
Kelsey Endres	Licensed legal professional (Lawyer, LLLT, LPO)	I am 100% for training in mental health and technology security!!
Laura Blair-Gano	Licensed legal professional (Lawyer, LLLT, LPO)	
Marguerite Friedlander	Licensed legal professional (Lawyer, LLLT, LPO)	I think the Mental Health ethics component is long overdue and (in my opinion) a very important addition to the ethical compendia. The state employees who are also bar members already have to fulfill annual technical security ethics. Would this qualify for the bar requirement?
Anthony Menke	Licensed legal professional (Lawyer, LLLT, LPO)	I think this is an excellent amendment and will serve our profession very well !!!
Elisa Wood	Licensed legal professional (Lawyer, LLLT, LPO)	

Chris Mammen	Licensed legal professional (Lawyer, LLLT, LPO)	Under the model rules, it's a lawyer's obligation to keep abreast of the benefits and risks of technology.
Rhena Brinkmann	Licensed legal professional (Lawyer, LLLT, LPO)	
John Keenan Osborne IV	Licensed legal professional (Lawyer, LLLT, LPO)	
Zeshan Q. Khan	Licensed legal professional (Lawyer, LLLT, LPO)	
Dawna Swenson	Licensed legal professional (Lawyer, LLLT, LPO)	I would be fine with 2 additional credit requirements, per reporting period. It would be interesting to listen to speakers on both topics
Charles Dold	Licensed legal professional (Lawyer, LLLT, LPO)	This was a good idea when it was first proposed, remains a good idea now and I am surprised it took so long to get this done. As past chair of the CLE committee we considered this to be a valuable addition to the list of materials enabling our members to retain the support of the communities they serve.
Carla Reyes	Licensed legal professional (Lawyer, LLLT, LPO)	
David Upshaw	Licensed legal professional (Lawyer, LLLT, LPO)	
Joshua Grissom	Licensed legal professional (Lawyer, LLLT, LPO)	
Cindy Gaddis	Licensed legal professional (Lawyer, LLLT, LPO)	I like the list of ethics topics under Education Requirements.
Elizabeth Thompson-Lagerberg	Licensed legal professional (Lawyer, LLLT, LPO)	Excellent proposal. The new areas are critical areas for legal professionals to be aware of and practice.
Sylvia A Miller	Licensed legal professional (Lawyer, LLLT, LPO)	
Anne Mullen	Licensed legal professional (Lawyer, LLLT, LPO)	These are good things to be responsible to learn.
Karolyn Klohe	Licensed legal professional (Lawyer, LLLT, LPO)	
Christy Peters	Licensed legal professional (Lawyer, LLLT, LPO)	
Kirsten Gregory	Licensed legal professional (Lawyer, LLLT, LPO)	
Michael Swick	Licensed legal professional (Lawyer, LLLT, LPO)	
Matthew Crane	Licensed legal professional (Lawyer, LLLT, LPO)	Seems like a reasonable approach for dealing with the issues outlined.
Jayne Marsh Gilbert	Attorney	Sounds good to me.
Dale schofield	Licensed legal professional (Lawyer, LLLT, LPO)	
Ben Dietz	Licensed legal professional (Lawyer, LLLT, LPO)	The two new categories are critical to the competent practice of law.
michael rubin	Licensed legal professional (Lawyer, LLLT, LPO)	it's a good idea
John Newcome	Licensed legal professional (Lawyer, LLLT, LPO)	Direct action in addressing mental health issues and substance abuse among attorneys has been needed for years. I applaud these initial steps taken to address mental health and substance abuse through education. I hope this will encourage law firms and employers to grant affected attorneys extended leave to seek treatment as a benefit to the traditional vacation/sick leave.
Katie Archer Jolma	Licensed legal professional (Lawyer, LLLT, LPO)	If these additional credits are adopted, then I would suggest these credits be offered as free "Lunch and Learn" sessions or as on-demand videos.
Anne-Marie Marra	Licensed legal professional (Lawyer, LLLT, LPO)	
Greg Stadter	Licensed legal professional (Lawyer, LLLT, LPO)	Seems practical and useful as stated.
Colleen Ottoson	Licensed legal professional (Lawyer, LLLT, LPO)	
William Doyle	Licensed legal professional (Lawyer, LLLT, LPO)	

Genissa Richardson	Licensed legal professional (Lawyer, LLLT, LPO)	Requiring technology and mental health CLEs is a good idea and an appropriate change to the current CLE requirements.
Patrick Preston	Licensed legal professional (Lawyer, LLLT, LPO)	These are relevant topics for most legal professionals in their practices. Thanks.
Denise Gertis	Licensed legal professional (Lawyer, LLLT, LPO)	
Dawn M. Keller	Licensed legal professional (Lawyer, LLLT, LPO)	
James D. Senescu	Licensed legal professional (Lawyer, LLLT, LPO)	
Victoria Kesala	Licensed legal professional (Lawyer, LLLT, LPO)	I think the new requirements will help us be better practitioners and reduce inadvertent ethics breaches. I THINK IT IS THE RESPONSIBILITY OF THE WSBA TO PROVIDE EDUCATION IN THESE NEW AREAS AT NO COST. That's in all-caps because I sure don't want to be searching for something to comply and find only expensive options. I also think it is important to make the education accessible (no contact, on-demand courses).
Paula Emery	Licensed legal professional (Lawyer, LLLT, LPO)	Well done, MCLE committee! Thank you.
Kim Kremer	Licensed legal professional (Lawyer, LLLT, LPO)	I think both amendments reflect how society has changed and will strengthen the profession and enhance the public's trust in our bar.
john hoglund	Licensed legal professional (Lawyer, LLLT, LPO)	
Malena Pinkham	Licensed legal professional (Lawyer, LLLT, LPO)	
Kristi Knieps	Licensed legal professional (Lawyer, LLLT, LPO)	
Stephen R. Shelton	Licensed legal professional (Lawyer, LLLT, LPO)	
Ry Ravenholt	Licensed legal professional (Lawyer, LLLT, LPO)	
Joann Abelson	Licensed legal professional (Lawyer, LLLT, LPO)	
Richelle Little	Licensed legal professional (Lawyer, LLLT, LPO)	These topics are important, and all lawyers should be educating themselves in these areas.
Alex Reaganson	Licensed legal professional (Lawyer, LLLT, LPO)	
Michelle DeLappe	Licensed legal professional (Lawyer, LLLT, LPO)	I am particularly concerned about the lack of technology competence among certain members of the bar and the potential vulnerability of both their own clients' confidential information as well as my clients' confidential information when it is provided to them in their role as opposing counsel. For example, I have encountered opposing counsel who do not know how to use a secure file share site to download and upload documents and who misconstrue insistence on using one as unreasonable or obstructionist behavior. It is essential that all lawyers receive regular training on this ever-changing aspect of legal practice as it affects all lawyers/legal professionals and all clients ultimately.
thomas martin rasmussen	Licensed legal professional (Lawyer, LLLT, LPO)	
Martin Kreshon	Licensed legal professional (Lawyer, LLLT, LPO)	

Elena Praggastis	Licensed legal professional (Lawyer, LLLT, LPO)	Good idea. Might be tough for some folks to meet and cause frustration, but if the MCLE Board provides resources on programs that will help folks meet the new requirements, and if regular programs add materials to make it easy for practitioners to satisfy, I don't see any issues. These are important issues that attorneys should be aware of regardless.
Laura Mancuso	Licensed legal professional (Lawyer, LLLT, LPO)	
Leanne Bowker	Licensed legal professional (Lawyer, LLLT, LPO)	I think it is good as long as you will provide classes to meet the rules.
Cameron	Licensed legal professional (Lawyer, LLLT, LPO)	
Carol Sue Janes	Licensed legal professional (Lawyer, LLLT, LPO)	I support the additional requirement. It seems important to stay up to date about these topics.
Glenna L. Malanca	Licensed legal professional (Lawyer, LLLT, LPO)	Mental Health is interwoven with a complex mix of increasingly easy access to military type guns, with the new Supreme Court's expansion of 2nd Amendment rights. The more we can try to understand every possible aspect of almost daily mass killings, perhaps the closer we can come to alleviating the tragedies. Equity issues have become highlighted as the concept of inclusion is being challenged by some GOP states' attempts to prohibit books, teachings and thoughts to be limited to only those acceptable to the most extreme "America First" believer. AI is fraught with dangers, technologically, as are other invasive methods attacking privacy for us and our clients. This is an important area for defensive knowledge. Good forward thinking! I approve and support on all fronts.
Mika Ito	Licensed legal professional (Lawyer, LLLT, LPO)	
Charles Akin BLitz	Licensed legal professional (Lawyer, LLLT, LPO)	Good idea. I have found while administrating aspects of IT that most lawyers are clueless of Firm recordkeeping and ethical duties related to client communications and electronic records. Text communications, communications to personal email accounts, records and correspondence saved on personal machines of Firm machines off-line, ... Should be eye-opening for at least some, and likely many.
Carolina Sun-Widrow	Licensed legal professional (Lawyer, LLLT, LPO)	I fully support all proposed amendments, particularly the mandatory mental health ethics credits. Two reasons: 1) as lawyers and judges, we are at bottom helping clients and parties resolve consequential problems. We cannot fulfill that role if we ourselves need help diagnosing, managing, and overcoming mental health issues; 2) the surveys on children and teens' mental health is devastating; we are in a crisis. Those same teens and college aged students will be joining the legal profession in as little as 3-5 years. We owe it to the next generation of lawyers to stay on top of this.
Conrad Smucker	Licensed legal professional (Lawyer, LLLT, LPO)	
Ada Danelo	Licensed legal professional (Lawyer, LLLT, LPO)	

Dwight Van Winkle	Licensed legal professional (Lawyer, LLLT, LPO)	Many ethics CLEs already exist on tech and mental health, reflecting their importance and easing the burden of fulfilling the new requirements.
Leah Eccles Watson	Licensed legal professional (Lawyer, LLLT, LPO)	Poor mental health is a leading contributor to malpractice. Much of what we do subjects us to information that causes vicarious trauma. And technology awareness is essential today iin the legal field and understanding the ethics of technology is vital.
Catherine Merrill	Licensed legal professional (Lawyer, LLLT, LPO)	What could possibly be wrong with this!
Martin Rollins	Licensed legal professional (Lawyer, LLLT, LPO)	Thank you for all your hard work on these issues.
Alexander E. Silverman	Licensed legal professional (Lawyer, LLLT, LPO)	
Elizabeth Kandiew	Licensed legal professional (Lawyer, LLLT, LPO)	Cyber security is a reality. I am consistently amazed at how many attorneys email me documents and information via unsecured email. As for mental health, most attorney's are assisting individual clients in some capacity. Although rewarding, helping people with their problems can feel overwhelming at times. A requirement for a mental health CLE would be a wonderful reminder to us Type A's to take care of ourselves... Thank you for all you do!!
Shawn Alexander	Licensed legal professional (Lawyer, LLLT, LPO)	
Catherine Pope	Licensed legal professional (Lawyer, LLLT, LPO)	
Douglas Degroot	Licensed legal professional (Lawyer, LLLT, LPO)	
Sue Stepp Tamblyn	Licensed legal professional (Lawyer, LLLT, LPO)	
Margie Allen	Licensed legal professional (Lawyer, LLLT, LPO)	
Jessica Erickson	Licensed legal professional (Lawyer, LLLT, LPO)	
Pat Lashway	Licensed legal professional (Lawyer, LLLT, LPO)	These new requirements ensure that more professionals “touch” areas of impact in our society and are therefore better positioned to assist a wider range of clients with a wider range of issues helping to keep legal services relevant to more people.
Jessica Lewis	Licensed legal professional (Lawyer, LLLT, LPO)	
Katelynn Walters	Member of the public	
Joene Gunderson	Licensed legal professional (Lawyer, LLLT, LPO)	
Jacqueline Marrast-Simpson	Licensed legal professional (Lawyer, LLLT, LPO)	
BARBARA Reinsma	Licensed legal professional (Lawyer, LLLT, LPO)	
Joshua Treybig	Licensed legal professional (Lawyer, LLLT, LPO)	
Sarah Elerson	Licensed legal professional (Lawyer, LLLT, LPO)	

Elizabeth R. Bain	Licensed legal professional (Lawyer, LLLT, LPO)	My sole concern is that WSBA provide MULTIPLE opportunities for members to fulfill these new requirements each year at a relatively low cost. When other states where I am licensed have added a specialty CLE requirement, it has often been difficult to locate and complete an approved course. For the first year or two or more it was often ONLY that bar association that offered any approved course, and it was only available live (not as a replay, on demand). This made it quite difficult for many to fulfill the requirement in a timely manner.
Michelle Eacrett	Licensed legal professional (Lawyer, LLLT, LPO)	
Amy Richards	Licensed legal professional (Lawyer, LLLT, LPO)	
Amy Bonfrisco	Licensed legal professional (Lawyer, LLLT, LPO)	
Monica Rands-Preuss	Licensed legal professional (Lawyer, LLLT, LPO)	
Michele McNeill	Licensed legal professional (Lawyer, LLLT, LPO)	Long overdue I would say
Kendra Grieco	Licensed legal professional (Lawyer, LLLT, LPO)	
Ian A. Northrip	Licensed legal professional (Lawyer, LLLT, LPO)	
Michael	CLE Sponsor	
Joann Dewey	Licensed legal professional (Lawyer, LLLT, LPO)	
Tali Smith	Licensed legal professional (Lawyer, LLLT, LPO)	
Anna Endter	Licensed legal professional (Lawyer, LLLT, LPO)	
Laura Evezich	Licensed legal professional (Lawyer, LLLT, LPO)	
Lauren Novack	Licensed legal professional (Lawyer, LLLT, LPO)	
Elizabeth Touschner	Licensed legal professional (Lawyer, LLLT, LPO)	
Faith Foote	Licensed legal professional (Lawyer, LLLT, LPO)	
Leone Reinbold	Licensed legal professional (Lawyer, LLLT, LPO)	As a graduate of the law clerk program and member of the Law Clerk Board, I can attest that the educational value of being a tutor truly exceptional. Its easy to forget some of the basics with time and being a law clerk tutor provides an unbelievable refresher course.
Susan Kirkpatrick	Licensed legal professional (Lawyer, LLLT, LPO)	

Erika Tremblay	CLE Sponsor	Technology presents new ethical challenges for attorneys. They must navigate issues like client confidentiality in the digital age, the responsible use of social media, and the security of electronic communications and data. Attorneys need to understand the implications of emerging technologies, such as artificial intelligence, blockchain, and cloud computing, to effectively serve their clients. Incorporating technology into CLE equips attorneys with the necessary knowledge and skills to navigate these ethical dilemmas and maintain professional integrity. The legal profession is known for its high levels of stress, anxiety, and burnout. Attorneys often face heavy workloads, demanding clients, and emotionally challenging cases. Integrating mental health topics into CLE helps raise awareness about these issues, promoting self-care, stress management, and work-life balance among future lawyers. It also reduces the stigma associated with seeking help and encourages a supportive and empathetic legal culture.
Randall R. Hall	Licensed legal professional (Lawyer, LLLT, LPO)	Although I am in favor of the proposed amendment to the MCLE Ethics Requirements, I am concerned regarding the necessity of the proposal pertaining to technological security. I am certainly in favor of training pertaining to the protection of client confidential electronic data and property.
Ann Vetter-Hansen	judicial officer	
Susan Cohodes	Licensed legal professional (Lawyer, LLLT, LPO)	I think that both a tech and mental health requirement would be very useful and would not create an added burden. Very much in favor.
John Lainhart	Licensed legal professional (Lawyer, LLLT, LPO)	

Gillian Dutton	Law Professor and Licensed Lawyer	I am not sure if this would be useful, but law schools refer to a broader category of well-being rather than mental health, although the focus on mental health has long been a subject of concern for law students. https://abaforlawstudents.com/2021/04/22/path-to-reforming-aba-standards-to-promote-law-student-well-being/ In the ABA Standards for Legal Education 2022-23 Standard 303(b)(3) requires law schools to include professional identity in our curriculum. Interpretation 303-5 states "Professional identity focuses on what it means to be a lawyer and the special obligations lawyers have to their clients and society. The development of professional identity should involve an intentional exploration of the values, guiding principles, and well-being practices considered foundational to successful legal practice. Because developing a professional identity requires reflection and growth over time, students should have frequent opportunities for such development during each year of law school and in a variety of courses and co-curricular and professional development activities." Well-being practices might be a more inclusive way to define the new requirement. Having a yearly requirement also recognizes that well-being, like addressing bias, is not a onetime course component, but instead a lifelong skill. In that way it can help attorneys respond to a changing set of circumstances that create real stressors with a serious impact on the effectiveness and satisfaction of attorneys in practice. Here is the reference to the standards if needed. Thanks! https://www.americanbar.org/content/dam/aba/administrative/legal_education_and_admissions_to_the_bar/standards/2022-2023/22-23-standard-ch3.pdf
John Murphy	CLE Sponsor	It makes sense. I congratulate you on considering this adjustment.
Russell J. Mazzola, WSBA #5440	Licensed legal professional (Lawyer, LLLT, LPO)	I support the proposed change.
Michelle Fontenot	Licensed attorney and Director of Texas Lawyers' Ass	Technology is important for all lawyers to keep up with. Mental health issues impact the practice of law disproportionately and all attorneys should have minimal education for themselves or how to recognize issues with staff or other lawyers so we can work to improve the well-being of our legal community.
Aimee Harvey	Licensed legal professional (Lawyer, LLLT, LPO)	
Michael Schmidt	Licensed legal professional (Lawyer, LLLT, LPO)	
Mehera Nori	Licensed legal professional (Lawyer, LLLT, LPO)	
Matthew Emmons	Licensed legal professional (Lawyer, LLLT, LPO)	A frequently updated safeharbor for the use of Google Drive and Microsoft OneDrive is needed.
Anna Kincaid	Licensed legal professional (Lawyer, LLLT, LPO)	I think creating categories to fulfill would be positive because it would expose people to multiple viewpoints and resources if needed.

Sarah Bove	Licensed legal professional (Lawyer, LLLT, LPO)	While I support the additional of technology and mental health CLEs, I believe these should be written with more broadly to include changes in understanding around both mental health and technology.
Phyllis Craver Lykken	Member of the public	Considering what the American Bar Association recently adopted relating to AI (attached and worth reading in its entirety), it seems like CLEs examining the security and ethics of artificial intelligence would be meaningful. This recommended guideline below should give all attorneys and LLLTs pause. There was an article in the Seattle Times today whereby an attorney allegedly used Chat GT to prepare a brief that turned out to be false.. https://www.seattletimes.com/nation-world/heres-what-happens-when-your-lawyer-uses-chatgpt/?amp=1 2) Responsible individuals and organizations should be accountable for the consequences caused by their use of AI products, services, systems, and capabilities, including any legally cognizable injury or harm caused by their actions or use of AI systems or capabilities, unless they have taken reasonable measures to mitigate against that harm or injury; and AMERICAN BAR ASSOCIATION CYBERSECURITY LEGAL TASK FORCE ANTITRUST LAW SECTION TORT, TRIAL & INSURANCE PRACTICE SECTION SCIENCE & TECHNOLOGY LAW SECTION STANDING COMMITTEE ON LAW AND NATIONAL SECURITY REPORT TO THE HOUSE OF DELEGATES RESOLUTION 604
Simcha Dornbush, National Academy of CLE (Nacle.com)	CLE Sponsor	We agree with the MCLE Board's position that the subject matter in these additional areas of ethics are crucial to the competence of every lawyer today. As a national provider of CLE we have witnessed the trend that many other states have made similar topics mandatory learning for attorneys licensed in their state.
Sharon Brinley	Licensed legal professional (Lawyer, LLLT, LPO)	
Benjamin Premack	Licensed legal professional (Lawyer, LLLT, LPO)	
Mark R. Wardrop	CLE Sponsor	

Ruth Ptak	Licensed legal professional (Lawyer, LLLT, LPO)	Both of the suggested areas covered by this amendment are critical to the successful, and ethical, practice of law. Failing to remain aware of technological developments (and their corresponding security needs/flaws) can lead to danger in a number of ways. It would seem appropriate to require some minimal level of competence/ongoing awareness of technological developments and their corresponding security concerns. Mental health is, arguably, a field of even deeper need for recognition within the legal practice. Each area of practice may pose different needs or challenges for each individual, and those needs/challenges may change over the years. Every person's mental health journey will look different, of course, and it would be difficult to mandate that a person take specific steps on that journey. Still, there is a direct nexus between an attorney's mental health (their ability to assess danger zones, respond to those dangers, or recover from them) and their ability to practice ethically. The health of the profession overall will be benefited, and this benefit can accrue without significant intrusion into each individual attorney's journey - a factor that may be of even more benefit to those who might struggle to independently reach out for help on whatever leg of the journey they are on. In short, the suggested amendment clarifies a couple of ethical duties that have truly always existed, but it calls upon members of the bar to take a more vigilant approach on these topics. This is an amendment that I can support unconditionally.
Pamela Charles	Licensed legal professional (Lawyer, LLLT, LPO)	
Christopher Fox	Licensed legal professional (Lawyer, LLLT, LPO)	A much needed topic, with a bit of persuasion to encourage attentiveness.
Mark Von Weber	Licensed legal professional (Lawyer, LLLT, LPO)	June 7, 2023 Dear Sir or Madam: I am in favor of the Suggested Amendment to APR 11 and interested to learn how the new requirement is to be phased in and whether revision to the RPCs are needed to reflect this change. Thank you. Truly yours, Mark Von Weber
Virginia Halden	Licensed legal professional (Lawyer, LLLT, LPO)	
Evangeline Stratton	Licensed legal professional (Lawyer, LLLT, LPO)	
Renee Cogdell Lewis	Licensed legal professional (Lawyer, LLLT, LPO)	The proposed new requirements are important, and I am pleased the overall credit hours would not be increased.

WASHINGTON STATE
BAR ASSOCIATION

To: Renata Garcia, Chief Regulatory Counsel / MCLE Board
RE: Preliminary Suggested Amendment to APR 11, Accredited Sponsor Feedback
Date: June 8, 2023
From: Shanthi Raghu, Education Programs Manager, WSBA CLE

Thank you for the opportunity to provide feedback as an accredited sponsor on the preliminary suggested amendment to APR 11.

As an accredited sponsor, WSBA CLE develops and delivers CLEs on these topics currently. At times, these topics are accredited under "Other – Professional Development" or "Other – Office Management." At other times, these topics fall squarely under "Ethics". The feedback we provide about the preliminary suggested amendment centers around the language as crafted, the question about application of the preliminary proposed standards, and the potential limitation it poses to the content and what might be expected of a presenter's professional treatment of the topics. At this time, we do not have feedback to provide about the number of ethics credits this proposal would require of members in a MCLE reporting year, nor question the importance of the topics generally, but rather have concerns with the specific narrow treatment of the subjects that the language seems to convey. Finally, as an accredited sponsor, we have questions about the communication plan to both sponsors and members and requests that one can be considered along with the timeline of application if the amendment were to come to fruition.

<u>Language:</u>

With regards to the language crafted for the mental health ethics, we were concerned that it could be construed to convey that there is an innate ethical risk to the practice of law if an individual presents as having any of the listed mental health issues.

<u>Content Limitations, Ethics, and Professional Treatment of the Topics:</u>

Many presenters who are versed in either technology or mental health/wellness may not have the professional experience or background to speak to the Rules of Professional Conduct specifically but may in some cases be best positioned to address these topics. Presenters with professional expertise squarely in technology and/or mental health/wellness may be able to provide important information that members of the bar may benefit from in both topics, and still support members in practicing ethically, without having a direct citation to the RPCs. Having developed several programs for the Board of Governors free ethics credits on mental health and cybersecurity, WSBA CLE has directly experienced how tying the content directly to the RPCs limits the pool of individuals we are able to invite to speak, and how they accurately present the topic.

In addition, if members are required to obtain the two additional credits as drafted, and the narrow treatment of the subjects is in practice, sessions on these topics that end up being accredited under "Other" may not be perceived as essential to ethical practice of law.

At our meeting on June 9th, the Committee on Professional Ethics reviewed the proposed amendments to the ethics portion of the MCLE requirements. The CPE had the following observations and concerns:

1. In general, the CPE does not favor the proposed amendments. The consensus of the members is that the amendments dilute the existing requirement for general ethics training on the Rules of Professional Conduct.

2. Members of the CPE did note that, based on their experiences as volunteers in the disciplinary process, a substantial number of complaints stem from lack of familiarity with technology or issues related to the mental health of the practitioner. However, even more complaints stem from other RPC issues such as failure to maintain a compliant trust account, conflicts of interest, and failure to maintain confidentiality, and no carve out category for training in those areas has been proposed. In general, the CPE believed that the public would be better served if lawyers select continuing legal education in the areas of ethics that will be most useful to their practice or situation.

3. The CPE members expressed their view that certain RPCs which bear on technology and mental health issues are straightforward, yet general, i.e, the duty of competency (RPC 1.2) and the duty of diligence (RPC 1.3). Thus, while the issues within the profession are real, the need for specialized training seems less clear.

4. The CPE members noted that Comment 18 to RPC 1.6 (confidentiality) already contains guidance related to the use of technology. The CPE questioned whether a WSBA wide requirement for additional training on the ethical implications of this topic will be useful, given the rapidly evolving nature of technology related to legal work and the highly fact specific circumstances that arise. Practitioners who face technology issues might be better advised to consult with experts who can provide a tailored approach to technology issues. Additionally, the CPE questioned whether there would be an ample number of CLE providers who had the requisite familiarity with emerging issues in technology **and** the complexities of RPC 1.6.

4. One CPE member noted that the definitions in the proposed amendments relating to equity were much less detailed than the definitions related to technology and mental health and queried whether there was a reason for this disparity.

5. The CPE asked why these additional specific requirements are framed as ethics requirements. If the Board of Governors determines that specific requirements for training on technology and mental health issues are warranted, the CPE would recommend that they be imposed as general CLE requirements, rather than framed as ethics requirements.

Of course, these are observations by the CPE, not an official recommendation from the CPE to the Board of Governors. We appreciate the opportunity to provide input and thank you for your consideration of these points

WASHINGTON STATE
BAR ASSOCIATION

June 5, 2023

To: MCLE Board
RE: Preliminary Suggested Amendment to APR 11

Dear MCLE Board,

I am submitting to you feedback regarding your proposed rule change regarding a mandatory wellness and ethics credit on behalf of the WSBA Member Wellness Program. First, we appreciate your commitment to the mission of our program by supporting the wellness of the legal profession by making this credit mandatory. Unfortunately, it will have a major impact on how presentations are delivered, our ability to furnish presentation requests, and ultimately, by tying all points to ethics, will diminish how the membership experiences our stated commitment to wellbeing in the legal profession.

When I joined WSBA in 2008, far fewer wellness presentations were delivered. One reason is that MCLE criteria required that the content tied back to how to be a better lawyer. It was challenging finding mental health professionals to deliver this content. In 2014, MCLE allowed for a Personal Development credit that allowed more freedom to deliver mental health and wellness content to the legal profession. This has led to an increase in the number of presentations delivered as well as a blossoming of trainings on sundry topics not previously offered: imposter syndrome, compassion fatigue, self-care, asking for help, and resisting stigma to name a few. Even though these presentations do not cover ethics explicitly, we believe a lawyers with a grounding in the diverse aspects of wellbeing are less likely to incur ethical problems related to the same.

Theoretically we can still provide personal development CLEs that are not attached to ethics, yet in practice almost all of our CLEs are one credit and I believe requests for our CLEs will also want to check off this box of an ethics and mental health-based credit. While 11 states, by our count, are requiring a wellness-based credit, none of these states have attached it to mental health and ethics in the same presentation. One reason is that these presentations are hard to deliver.

In 2021, I delivered a free Ethics and Wellness CLE to the membership. I divided it into three sections: Diligence, Competence, and Communication. Before each section I put up a slide to quote the RPC. It limited the reach of my ability to educate the membership about varied topics like self-care, compassion fatigue, stress management and sundry other topics as I was repeatedly interrupted by this requirement. It is also very hard to find mental health professionals who are familiar enough with lawyer RPCs to deliver this type of presentation.

In my conversation with the Oregon Attorneys Assistance Program which recently had a mandatory wellness-based credit added, they received requests for 38 such presentations in the last year. As a staff of two, we rely upon a speaker bureau for many of these presentations. Of these 23 names, I estimate only three presenters would be competent or interested in speaking to the RPCs. Additionally, in reviewing our last 10 Legal Lunchbox presentations that on average are viewed by 1800 online viewers, none of these would have qualified for the credit as it is being written.

Ultimately, we believe this requirement to tie wellness to the RPCs sends a message to the membership that we only care about their wellbeing as long as they are practicing responsibly and not harming the public. This qualified interest in their lives is likely to be experienced as injurious and will make our content less engaging. Additionally, this decision will have a vast and challenging impact on how our

WASHINGTON STATE
BAR ASSOCIATION

program engages with our members. Consequently, we would earnestly suggest the MCLE Board consider expanding the definition of mental health content in the same way equity ethics are treated and require it to be applicable to the legal profession and practice of law but not specifically tied to the RPCs.

Sincerely,



Dan Crystal, PsyD

Program Manager, Member Wellness Program

To: MCLE Board

From: Margeaux Green on behalf of the Washington State Bar Association Practice Management Assistance Program

Subject: Proposed Cybersecurity MCLE Rule Change

We are in favor of implementing a cybersecurity CLE requirement; however, we have serious concerns about the rule in its current form. It is crucial to recognize the importance of mandating cybersecurity education for attorneys. Nevertheless, we believe that certain aspects of the existing rule should be reconsidered and revised to ensure its effectiveness and practicality. We are concerned about the requirement of closely linking the CLE content to the RPCs. The proposed rule would mean that CLE presenters must give significant attention to the RPCs, which may detract from addressing crucial best practices like secure cloud adoption, considerations for data management, and cybersecurity threats involving devices other than computers (such as IoT devices like Alexa). The existing scope of cybersecurity topics provides ample material to cover without burdening presenters with an extensive discussion of the RPCs. This requirement not only imposes significant content limitations for presenters but also narrows down the pool of qualified individuals who may serve as faculty. Many cybersecurity experts who are well-suited and interested in presenting on this topic, but who are not experts in the lawyer Rules of Professional Conduct, would be excluded from participating as presenters. Our suggestion would be to expand the definition of the content that falls into the ethics requirement for Cybersecurity in the same way that was done for the Equity Ethics credit. It is our understanding that so long as the content discusses diversity, equity and inclusion in the legal profession it is accreditable as an ethics credit (without specifically discussing RPCs). We believe the cybersecurity credit is analogous to the DEI credit because learning about effective means of mitigating cybersecurity risks in a law practice will promote ethical practice without specifically quoting RPCs.

While we have reservations about the current proposed form of the rule, we strongly support the implementation of a cybersecurity CLE requirement. The prevalence of data protection and

cybersecurity issues poses significant challenges to businesses. Cyberattacks targeting law firms can have devastating consequences, such as the exposure of confidential client communications, sensitive data, and attorney work product. Regrettably, effective cybersecurity management is challenging for lawyers when managing a law firm and practicing law. Mandating lawyers to stay updated on cybersecurity issues will keep cybersecurity issues top of mind and provide helpful information that lawyers can integrate into their practices. It is crucial for attorneys to continuously educate themselves on protecting client and firm data from cybersecurity threats. The potential risks to client and firm data are too substantial to ignore.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Alec Stephens, At-Large Governor and Equity & Disparity Workgroup Chair

DATE: July 21, 2023

RE: Proposed Revision of GR12.2(c) Originated by the Equity & Disparity Workgroup

SECOND READ: Proposed Revision of GR12.2(c) Originated by the Equity & Disparity Workgroup

The Equity & Disparity (E&D) Work Group was tasked with (1) reviewing rules, regulations, and laws related to the practice of law and administration of justice to identify ones that impede real justice and fairness and (2) propose solutions that mitigate harm caused by unjust rules and procedures to go before the BOG.

With a technical edit made by Gov. Alec Stephens, E&D Work Group Chair, attached is the proposal of the GR 12.2(c) Subcommittee of the E&D Work Group, which was adopted by the full Workgroup in December 2022. The Workgroup identified GR 12.2(c) as a regulation related to the practice of law and administration of justice that impedes real justice and fairness. The Workgroup offers the proposed solution for the BOG to consider and makes this presentation at the March 2023 BOG meeting for notice and intent to propose for Action as first read in June 2023, and final action on second read in August 2023. If the BOG approves the proposed change, it would be submitted to the Supreme Court for its consideration under its processes for proposed rules changes.

Background

In June of 2020 the Washington State Bar Association's (WSBA or the Bar) Board of Governors (the BOG), created the Equity & Disparity Work Group (the E&D Work Group) "to reckon with the harsh reality that laws, policies, and procedures in place in the legal system have historically led to disparate and inequitable results that disproportionately harm people of color. Achieving equity is impossible without meaningful access to justice, which necessitates addressing historical harms and challenging laws that facilitate injustices. As active participants in these systems, legal professionals are morally obligated to disrupt these gaps in justice."[1] The Washington Supreme Court's June 4, 2020, open letter[2] further informs the work of the E&D Work Group and the obligations of all legal practitioners in Washington State.

With this background, the E&D Work Group was tasked with (1) reviewing rules, regulations, and laws related to the practice of law and administration of justice to identify ones that impede real justice and fairness and (2) propose solutions that mitigate harm caused by unjust rules and procedures to go before the BOG.

[1] See Equity & Disparity Work Group (wsba.org)
[2] Judiciary Legal Community SIGNED 060420.pdf (wa.gov)

In summary is the proposal of the GR 12.2(c) Subcommittee of the E&D Work Group. As explained further below, the Subcommittee has identified GR 12.2(c) as a regulation related to the practice of law and administration of justice that impedes real justice and fairness. The Subcommittee offers the proposed solution below for the BOG to consider, with further discussion in the attached analytical statement.

GR 12.2(c) reads as follows:

> **(c) Activities Not Authorized.** The Washington State Bar Association will not:
>
> (1) Take positions on issues concerning the politics or social positions of foreign nations;
>
> **(2) Take positions on political or social issues which do not relate to or affect the practice of law or the administration of justice**; or
> (3) Support or oppose, in an election, candidates for public office.

PROPOSED LANGUAGE CHANGE

The E&D Work Group GR 12.2(c) Subcommittee proposes that the language of this rule be changed as follows:

> **(c) Activities Not Authorized.** The Washington State Bar Association will not:
>
> (1) Take positions on issues concerning the politics or social positions of foreign nations;
>
> **(2) Take positions ~~on political or social issues~~ which do not relate to or affect the ~~practice of law or the administration of justice~~ objectives of GR 12.1 or GR 12.2 (a) or (b)**;[3]
> (3) Support or oppose, in an election, candidates for public office.

[3] Original language in the Analytical Statement prepared by the E&D Work Group proposed to revise GR 12.2(c)(2) as follows: "(2) Take positions ~~on political or social issues~~ which do not relate to or affect the ~~practice of law or the administration of justice~~ regulatory objectives of GR 12.1". GR 12.1, which is titled "Regulatory Objectives", provides "Legal services providers must be regulated in the public interest. In regulating the practice of law in Washington, the Washington Supreme Court's objectives include: [enumerated objectives follow]". A listing of the objectives set forth in GR 12.1 as well as 12.2 (a) and (b) are attached.

Stakeholder Input

Outreach on the GR 12 Subcommittee proposal:

The GR 12 Subcommittee conducted the feedback gathering process intending to reach three groups: members of minority bar associations (MBAs), Sections, and WSBA committees and boards. Messaging and materials were tailored specifically to each of these three groups, which were reached in a couple different ways. The minority bar associations were reached through the WSBA Equity and Justice Team. Equity and Justice Specialist Saleena Salango (who interfaces regularly with the MBAs) pushed out the messaging and materials to all MBA leaders through a listserv. The Sections and WSBA committees and boards were reached through the inVEST framework, by tapping each staff liaison to reach out individually to their entity. It is estimated that the subcommittee reached out to approximately 70 groups.

Feedback was encouraged from individuals as well as from groups as a whole via a Microsoft form, which allowed for both simple yes/no answers and long-form comments. The GR 12 Subcommittee received feedback from 13 individuals and/or groups (14 responses total—one person responded twice). Responses on behalf of groups came from MAMA Seattle, the Practice of Law Board, and the Korean American Bar Association. Responses from individuals came from members of the Civil Rights Law Section, the Low Bono Section, the World Peace Through Law Section, the Board of Bar Examiners, the Court Rules and Procedures Committee, and the Committee on Professional Ethics. All feedback received is listed on the Excel spreadsheet following this page. The general theme of the feedback received was one of positivity and support for the proposed changes. Of the 13 pieces of feedback, 12 were in support and 1 was in opposition.

A record of those comments is included in the materials in support of this action.

In addition, the chair of the GR 12 Subcommittee, Laura Sierra, attended a DEI Council meeting to explain the subcommittee's proposed changes. This council had not had time to prepare feedback as a group prior to the requested deadline, and therefore asked the GR 12 Subcommittee chair to attend a meeting to allow for additional feedback and to answer any questions. Following that meeting, the DEI Council provided a letter of support for the proposed revision and submitted that letter to the Board of Governors on February 13. 2023.

Lastly, feedback from the general WSBA membership was solicited for approximately six weeks in June and July 2023. Of the six members to respond, five were in opposition and one was in support.

A record of those comments is included in the materials.

1325 4th Avenue | Suite 600 | Seattle, WA 98101-2539
800-945-WSBA | 206-443-WSBA | questions@wsba.org | www.wsba.org

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

GR 12.2(c)(2) was adopted in 1987 in response to conversations and pending cases on the intersection of integrated bar activities, compelled license fees and First Amendment protections. Three years later, the U.S. Supreme Court issued Keller v. California State Bar, 496 U.S. 1 (1990). The Rule language (will not take positions on political or social issues which do not relate to of affect the practice of law or the administration of justice) is similar to the *Keller* language (mandatory fees may not be used over a member's objection for activities that are political or ideological in nature and which are not reasonably related to regulating the practice of law or improving the quality of legal services.) The Equity and Disparity Workgroup's materials do not explain exactly why GR 12.2(c)(2) was identified as a rule that "impedes real justice and fairness." This risk analysis assumes that the difficulty in defining political, social, "relate to of affect the practice of law" and "administration of justice" could create inconsistent and overly broad limitations on the WSBA's ability to take actions supporting its mission.

The proposed change to GR 12.2(c)(2) appears to align with *Keller* by prohibiting the WSBA from taking positions that do not relate to the purposes that justify the existence of the mandatory bar, as stated in GR 12.1 and 12.2. This change also aligns with the U.S. Supreme Court's statement that "the central holding in Keller. . . was that the objecting members were not required to give speech subsidies for matters not germane to the larger regulatory purpose which justified the required association." United States v. United Foods, Inc., 533 U,S, 405, 414 (2001). This later Supreme Court decision aligns with the proposed change in focusing on the purposes of the integrated bar rather than the word "political'.

The harder part of this analysis is to determine what activities might be permitted under the current Rule and prohibited under the proposed Rule and, therefore, whether the proposal more effectively supports real justice and fairness than the current Rule. It is possible that some of the activities, particularly legislative activities the WSBA and WSBA entities engage in now, might be difficult to justify under the new Rule. It might be a prudent step to engage stakeholders in a discussion of this topic. Focusing on the legislative function, this discussion could include whether law improvement is germane to the purposes of the integrated bar and, if so, it is clearly stated under the Rules.

The risk analysis of the Analytical Statement will be submitted with the Second Read materials.

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

The fiscal impact to WSBA resulting from the proposed recommendation is limited to the amount of staff time used to incorporate any approved revisions to the relevant records. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and would not require additional staff or allocation of resources from other internal sources.

WSBA EQUITY ANALYSIS: *This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.*

The stated goal of the Equity & Disparity Work Group is "to reckon with the harsh reality that laws, policies, and procedures in place in the legal system have historically led to disparate and inequitable results that disproportionately harm people of color." The stated purpose of the work group and their proposal to amend GR 12.2(c) is to advance equity by removing the barriers that impede real justice and fairness. Upon review of the proposed amendments and analysis in light of the stated purpose, goals and make-up of the work group, it appears that the proposal will advance equity. In terms of the process the work group engaged in, the work group sought broad feedback as well as targeted feedback from presumably impacted groups like the Minority Bar Associations and Sections but did not seek targeted feedback from staff nor the public. Staff would likely have valuable input given the partnership role they play with entities and helping them navigate the General Rules. The public, particularly the communities who experience disparate and inequitable treatment and harm, would presumably have valuable input as the one of the most impacted groups.

Attachments

About the Equity & Disparity Workgroup from WSBA Website
Analytical Statement Proposing Revision to GR 12.2(c)
GR 12.1 Objectives of the Washington Supreme Court Highlighting Key Provisions
GR 12.2 (a) & (b) Purposes and Authorized Activities of the WSBA Highlighting Key Provisions
Summary of comments from Stakeholder outreach
Summary of comments from membership outreach

Equity & Disparity Work Group

Responding to the murders of George Floyd, Breonna Taylor, Tony McDade, Charleena Lyles, Manuel Ellis, and countless others by police officers, the nationwide uprisings addressing virulent racism in the United States, as well as the COVID-19 pandemic and resulting economic devastation, the WSBA Board of Governors created the Equity & Disparity Work Group in June 2020.

On June 4, 2020, the Washington Supreme Court issued an open letter in response to many of these same events. The letter states, in part: "We call on every member of our legal community to reflect on this moment and ask ourselves how we may work together to eradicate racism.

The goal of the Equity & Disparity Work Group is to reckon with the harsh reality that laws, policies, and procedures in place in the legal system have historically led to disparate and inequitable results that disproportionately harm people of color. Achieving equity is impossible without meaningful access to justice, which necessitates addressing historical harms and challenging laws that facilitate injustices. As active participants in these systems, legal professionals are morally obligated to disrupt these gaps in justice.

The Equity & Disparity Work Group seeks to review rules, regulations, and laws related to the practice of law and administration of justice by identifying ones that impede real justice and fairness. The Equity & Disparity Work Group will then propose solutions that mitigate harm caused by unjust rules and procedures to go before the Board of Governors.

Work Group Structure and Timeline

Work Group Roster

Composition
Work Group Chair: Alec Stephens

Subcommittee Chairs:

- Laura Sierra (GR 12.2)
- Kim Sandher (Experiences of the Justice System)

The Equity & Disparity Work Group membership consists of legal professionals that represent marginalized communities in the profession, as well as in society. This Work Group seeks to amplify the experiences of people that are closest to the problems and allow for solutions that can effect positive change for the legal system.

Charter:

- Review the rules, regulations, and laws related to the practice of law and the administration of justice;

- Identify the ones that facilitate injustice;
- Solicit feedback from stakeholders, especially from marginalized communities; and
- Propose remedies that the WSBA can advance pursuant to its mandate in GR 12.2.

Timeline

- The Work Group will report to the Board of Governors every six months on its progress.
- The Work Group will submit final written majority and minority reports with recommendations for rule changes to the Board of Governors by no later than the Board's September 2022 meeting. [Extended by the Board of Governors to the March 2023 meeting.]
- The Work Group will prepare and submit any rule changes supported by the Board of Governors to the Washington Supreme Court per GR9 requirements.

Source: WSBA Website-- Home/Connect & Volunteer/**Committees, Boards & Other Groups**

WSBA

Washington State Bar Association

GENERAL RULE 12.1(C) PROPOSED ANALYTICAL STATEMENT
Submitted by the WSBA Equity & Disparity Subcommittee Agenda GR 12.2(c) Subcommittee
To the Board of Governors
March 2023

I. BACKGROUND

In June of 2020 the Washington State Bar Association's (WSBA or the Bar) Board of Governors (the BOG), created the Equity & Disparity Work Group (the E&D Work Group) "to reckon with the harsh reality that laws, policies, and procedures in place in the legal system have historically led to disparate and inequitable results that disproportionately harm people of color. Achieving equity is impossible without meaningful access to justice, which necessitates addressing historical harms and challenging laws that facilitate injustices. As active participants in these systems, legal professionals are morally obligated to disrupt these gaps in justice."[1] The Washington Supreme Court's June 4, 2020 open letter[2] further informs the work of the E&D Work Group and the obligations of all legal practitioners in Washington State. Via this letter addressed to all members of the Washington Judiciary and Legal Community the Supreme Court made clear that it is an obligation of all WSBA members to:

> *[R]ecognize that we all bear responsibility for this on-going [racial systemic] injustice, and that we are capable of taking steps to address it, if only we have the courage and the will. The injustice still plaguing our country has its roots in the individual and collective actions of many, and it cannot be addressed without the individual and collective actions of us all.*
>
> ***
>
> *[D]evelop a greater awareness of our own conscious and unconscious biases in order to make just decisions in individual cases, and we can administer justice*

[1] See Equity & Disparity Work Group (wsba.org)
[2] Judiciary Legal Community SIGNED 060420.pdf (wa.gov)

and support court rules in a way that brings greater racial justice to our system as a whole.

***

[R]ecognize the harms that are caused when meritorious claims go unaddressed due to systemic inequities or the lack of financial, personal, or systemic support. And we must also recognize that this is not how a justice *system must operate. Too often in the legal profession, we feel bound by tradition and the way things have "always" been. We must remember that even the most venerable precedent must be struck down when it is incorrect and harmful.*

With this background, the E&D Work Group was tasked with (1) reviewing rules, regulations, and laws related to the practice of law and administration of justice to identify ones that impede real justice and fairness and (2) propose solutions that mitigate harm caused by unjust rules and procedures to go before the BOG.

Below is the proposal of the GR 12.2(c) Subcommittee of the E&D Work Group. As explained further below, the Subcommittee has identified GR 12.2(c) as a regulation related to the practice of law and administration of justice that impedes real justice and fairness. The Subcommittee offers the proposed solution below for the BOG to consider.

II. AS WRITTEN AND INTERPRETED GR 12.2(c) IMPEDES REAL JUSTICE AND FAIRNESS TO THE PRACTICE OF LAW AND THE ADMINISTRATION OF JUSTICE.

As noted in the existing GR 12(C)[3] Analytical Statement adopted by the BOG on 10/22/04, "the [WSBA] is frequently requested to take a position on political or social issues and/or proposed or pending legislation." This always raises the question of whether, pursuant to GR 12.2, the WSBA is allowed to take a position on such matters. Specifically, GR 12.2(c) outlines activities of the bar association that are not authorized. While GR 12.2(c)(1) and (3) are straightforward, GR 12.2(c)(2) often raises questions.

GR 12.2(c) reads as follows:

> **(c) Activities Not Authorized.** The Washington State Bar Association will not:
> (1) Take positions on issues concerning the politics or social positions of foreign nations;
> **(2) Take positions on political or social issues which do not relate to or affect the practice of law or the administration of justice**; or
> (3) Support or oppose, in an election, candidates for public office.

[3] The 2004 Analytical Statement refers to General Rule 12(c), but the contents of that Rule have since been codified as General Rule 12.2(c).

This same prohibition is stated in Article I of the Bylaws of the WSBA. However, on its face, this prohibition appears to conflict with the general purposes of the Bar as set forth in GR 12.1 and GR 12.2 (a)-(b). Moreover, as currently interpreted, GR 12.2(c) affirmatively prevents any WSBA Section from doing exactly what the Supreme Court has demanded all WSBA members do in its open letter: take action on matters that inextricably implicate political or social justice issues. An individual member of the Bar who believes the Supreme Court's directive to be purely "political" or "social" because they do not agree, for example, that systemic racism exists and affects the practice of law and the administration of justice can invoke GR 12.2(c) to impede the Supreme Court's directive.

In addition, the work of certain sections are particularly susceptible to being viewed as "political" or "social" (*e.g.*, Cannabis Law, Civil Rights Law, Criminal Law, Environmental and Land Use Law, Health Law, Indian Law, Juvenile Law, LGBT Law, etc.), which leaves those sections particularly vulnerable to being targeted as violating GR 12.2(c). Arguably, every section can be said to deal with "political" or "social" issues. Even corporate/business law affects a wide range of issues that are often viewed as "political" or "social" (such as fair and equitable taxation). But due to the subconsciously biased lens through which we tend to look at our various sections, business-oriented sections have much more freedom to comment on legislation and make public statements.

This memorandum proposes that (1) the WSBA BOG consider a revision to the wording in GR 12.1(c)(2) that more accurately and faithfully reflects the stated purposes of the WSBA as outlined in GR 12.2(a)-(b) and (2) revise its guidance on the limitations of GR 12.1(c)(2) that comports to the proposed new language which derives its approach from GR 12.1 and GR 12.2(a)-(b).[4]

III. PROPOSED LANGUAGE CHANGE

The E&D Task Force GR 12.2(c) Subcommittee proposes that the language of this rule be changed as follows:

> **(c) Activities Not Authorized.** The Washington State Bar Association will not:
> (1) Take positions on issues concerning the politics or social positions of foreign nations;
> **(2) Take positions ~~on political or social issues~~ which do not relate to or affect the ~~practice of law or the administration of justice~~ regulatory objectives of GR 12.1**;
> (3) Support or oppose, in an election, candidates for public office.

The proposed change is simple:

[4] Note that if accepted by the Supreme Court, the BOG will also have to amend Articles I.A. and I.B of the WSBA Bylaws, which mirrors the language of GR 12.2.

1. remove the phrase "on political or social issues" as this phrase creates
    a. the perception that even if an issue affects the practice of law or the administration of justice, if it is in any way "political or [a] social issue" then WSBA cannot take a position on it; and
    b. an unnecessary conflict between legitimate legal issues germane to the practice and regulating the legal profession and free speech given that WSBA offers a Keller exemption.[5]
2. Replace the phrase "practice of law or the administration of justice" with "regulatory objectives of GR 12.1" as this:
    a. More accurately encompasses the Supreme Court's and the Bar's objectives in regulating the practice of law in Washington State; and
    b. Removes the ambiguity of the phrase "administration of law" and "affect practice of law" as described in the existing GR 12(C) Analytical Statement adopted by the BOG on 10/22/04.

The Subcommittee suggests that this approach permits the Bar and its Sections to speak on, after obtaining the proper authorization from the Bar, issues that were outlined by the Supreme Court in its June 4, 2020 letter and which are essentially already contained in GR 12.1:

> (a) protection of the public;
>
> (b) advancement of the administration of justice and the rule of law;
>
> (c) meaningful access to justice and information about the law, legal issues, and the civil and criminal justice systems;
>
> (d) transparency regarding the nature and scope of legal services to be provided, the credentials of those who provide them, and the availability of regulatory protections;
>
> (e) delivery of affordable and accessible legal services;
>
> (f) efficient, competent, and ethical delivery of legal services;
>
> (g) protection of privileged and confidential information;
>
> (h) independence of professional judgment;

[5] In *Keller v. State Bar of California*, the U.S. Supreme Court ruled that a bar association may not use mandatory member fees to support political or ideological activities that are not reasonably related to the regulation of the legal profession or improving the quality of legal services. WSBA is required to identify that portion of mandatory license fees that go to such "nonchargeable" activities and establish a system whereby objecting members may either deduct that portion of their fees or receive a refund. *See* https://www.wsba.org/for-legal-professionals/license-renewal/keller-deduction.

(i) accessible civil remedies for negligence and breach of other duties owed, disciplinary sanctions for misconduct, and advancement of appropriate preventive or wellness programs;

(j) diversity and inclusion among legal services providers and freedom from discrimination for those receiving legal services and in the justice system.

The Subcommittee believes that adopting the proposed changes results in greater harmonization of the WSBA's Bylaws, the General Rules, and the obligations of all legal practitioners in the State of Washington.

IV. THE PROPOSED CHANGES TO GR 12.2(c) ALSO RESULT IN GREATER CONSISTENCY WITH THE STATED PURPOSES LISTED IN ARTICLES I.A. AND I.B. OF THE WSBA BYLAWS.

Currently, GR 12.2(c) states that the WSBA, and by extension any Section of the WSBA will not "[t]ake positions on political or social issues which do not relate to or affect the practice of law or the administration of justice." However, the language is inconsistent with the stated purposes of the Bar. Specifically, sections of GR 12.2, Purposes: In General, state that the Bar strives to, *inter alia*:

2. Promote an effective legal system, accessible to all.

3. Provide services to its members and the public.

6. Promote diversity and equality in the courts and the legal profession.

8. Administer programs of legal education.

9. Promote understanding of and respect for our legal system and the law.

11. Serve as a statewide voice to the public and to the branches of government on matters relating to these purposes and the activities of the organization and the legal profession.

All of the foregoing have the possibility of resulting in divided opinions amongst Bar members, for example: not all current Bar members agree on what an "effective legal system" or what an "accessible effective legal system" looks like – that does not make the issue a "political" or "social" one that the Bar cannot resolve. Indeed, to take such a position would lead to an absurd conclusion that neither the Bar nor any of its Sections could weigh in on any issue because there is a disagreement. Likewise, there is no question that the issue of "diversity and equality" is one that has resulted in much disagreement amongst Bar members. One need only look at the letters to the editor for the Bar News or listen in on discussions within the BOG and the Sections to conclude the same. Nonetheless "promoting diversity and equality in the courts and the legal profession" is clearly one of the Purposes enumerated by GR 12.2(a)(6)[6] and as such, any efforts

[6] By extension, it is also enumerated in the WSBA BOG's Bylaws.

to by the Bar or its Sections to speak on these matters should not be *per se* prohibited. As proposed, the new GR 12.2(c) language would achieve the goals set out in GR 12.2(a).

Likewise, as currently written, the language of GR 12.2(c) is inconsistent with sections of GR 12.2(b) Specific Activities Authorized, which state that the Bar may, *inter alia*:

> 1. Sponsor and maintain committees and sections whose activities further these purposes;
>
> 3. Provide periodic reviews and recommendations concerning court rules and procedures;
>
> 5. Inform and advise its members regarding their ethical obligations;
>
> 15. Disseminate information about the organization's activities, interests, and positions;
>
> 16. Monitor, report on, and advise public officials about matters of interest to the organization and the legal profession;
>
> 17. Maintain a legislative presence to inform members of new and proposed laws and to inform public officials about the organization's positions and concerns;
>
> 18. Encourage public service by members and support programs providing legal services to those in need;
>
> 19. Maintain and foster programs of public information and education about the law and the legal system;
>
> 21. Hire and retain employees to facilitate and support its mission, purposes, and activities, including in the organization's discretion, authorizing collective bargaining;

As with the analysis under GR 12.2(a), the proposed changes to GR 12.2(c) would result in a more internally consistent reading of the specific authorized activities of the Bar.

V. If the BOG and the Supreme Court Accept this Proposed Change, the BOG has the Authority to Amend the Bylaws to Ensure Consistency with the General Rules

It is well understood that as a general matter, bylaws must be internally consistent. If they are not, per Article XVI. Amendments, the BOG may amend the Bylaws, including those in Article I.C.(2), which forms the basis of GR 12.2(c), "at any regular meeting of the BOG, or at any special meeting of the BOG called for that purpose under the terms of the Bylaws." Accordingly, the BOG has the authority to amend the Bylaws as proposed by the GR 12.2(c) Subcommittee. *See* RCW 2.48.050; *cf. Parker Estates Homeowners Ass'n v. Pattison*, 197 Wn.

App. 1024, 2016 WL 7468226, at *1 (2016) (unpublished) (holding that a board of directors has the authority to amend bylaws).

Wash. Gen. R. 12.1

As amended through November 30, 2022

Rule 12.1 - Regulatory Objectives

Legal services providers must be regulated in the public interest. In regulating the practice of law in Washington, the Washington Supreme Court's objectives include:

(a) protection of the public;
(b) advancement of the administration of justice and the rule of law;
(c) meaningful access to justice and information about the law, legal issues, and the civil and criminal justice systems;
(d) transparency regarding the nature and scope of legal services to be provided, the credentials of those who provide them, and the availability of regulatory protections;
(e) delivery of affordable and accessible legal services;
(f) efficient, competent, and ethical delivery of legal services;
(g) protection of privileged and confidential information;
(h) independence of professional judgment;
(i) accessible civil remedies for negligence and breach of other duties owed, disciplinary sanctions for misconduct, and advancement of appropriate preventive or wellness programs;
(j) diversity and inclusion among legal services providers and freedom from discrimination for those receiving legal services and in the justice system.

Wash. Gen. R. 12.1

Wash. Gen. R. 12.2

As amended through November 30, 2022

Rule 12.2 - Washington State Bar Association: Purposes, Authorized Activities, and Prohibited Activities

In the exercise of its inherent and plenary authority to regulate the practice of law in Washington, the Supreme Court authorizes and supervises the Washington State Bar Association's activities. The Washington State Bar Association carries out the administrative responsibilities and functions expressly delegated to it by this rule and other Supreme Court rules and orders enacted or adopted to regulate the practice of law, including the purposes and authorized activities set forth below.

(a) Purposes: In General. In general, the Washington State Bar Association strives to:
(1) Promote independence of the judiciary and the legal profession.
(2) Promote an effective legal system, accessible to all.
(3) Provide services to its members and the public.
(4) Foster and maintain high standards of competence, professionalism, and ethics among its members.
(5) Foster collegiality among its members and goodwill between the legal profession and the public.
(6) Promote diversity and equality in the courts and the legal profession.
(7) Administer admission, regulation, and discipline of its members in a manner that protects the public and respects the rights of the applicant or member.
(8) Administer programs of legal education.
(9) Promote understanding of and respect for our legal system and the law.
(10) Operate a well-managed and financially sound association, with a positive work environment for its employees.
(11) Serve as a statewide voice to the public and to the branches of government on matters relating to these purposes and the activities of the association and the legal profession.

(b) Specific Activities Authorized. In pursuit of these purposes, the Washington State Bar Association may:
(1) Sponsor and maintain committees and sections whose activities further these purposes;
(2) Support the judiciary in maintaining the integrity and fiscal stability of an independent and effective judicial system;
(3) Provide periodic reviews and recommendations concerning court rules and procedures;
(4) Administer examinations and review applicants' character and fitness to practice law;
(5) Inform and advise its members regarding their ethical obligations;
(6) Administer an effective system of discipline of its members, including receiving and investigating complaints of misconduct by legal professionals, taking and recommending appropriate punitive and remedial measures, and diverting less serious misconduct to alternatives outside the formal discipline system;

(7) Maintain a program, pursuant to court rule, requiring members to submit fee disputes to arbitration;
(8) Maintain a program for mediation of disputes between members and others;
(9) Maintain a program for legal professional practice assistance;
(10) Sponsor, conduct, and assist in producing programs and products of continuing legal education;
(11) Maintain a system for accrediting programs of continuing legal education;
(12) Conduct examinations of legal professionals' trust accounts;
(13) Maintain a fund for client protection in accordance with the Admission and Practice Rules;
(14) Maintain a program for the aid and rehabilitation of impaired members;
(15) Disseminate information about the organization's activities, interests, and positions;
(16) Monitor, report on, and advise public officials about matters of interest to the organization and the legal profession;
(17) Maintain a legislative presence to inform members of new and proposed laws and to inform public officials about the organization's positions and concerns;
(18) Encourage public service by members and support programs providing legal services to those in need;
(19) Maintain and foster programs of public information and education about the law and the legal system;
(20) Provide, sponsor, and participate in services to its members;
(21) Hire and retain employees to facilitate and support its mission, purposes, and activities, including in the organization's discretion, authorizing collective bargaining;
(22) Establish the amount of all license, application, investigation, and other related fees, as well as charges for services provided by the Washington State Bar Association, and collect, allocate, invest, and disburse funds so that its mission, purposes, and activities may be effectively and efficiently discharged. The amount of any license fee is subject to review by the Supreme Court for reasonableness and may be modified by order of the Court if the Court determines that it is not reasonable;
(23) Administer Supreme-Court-created boards in accordance with General Rule 12.3.

(c)Activities Not Authorized. The Washington State Bar Association will not:
(1) Take positions on issues concerning the politics or social positions of foreign nations;
(2) Take positions on political or social issues which do not relate to or affect the practice of law or the administration of justice; or
(3) Support or oppose, in an election, candidates for public office.
Wash. Gen. R. 12.2

Adopted effective 7/17/1987; Amended effective 12/10/1993;9/1/1997;9/1/2007;9/1/2013;9/1/2017.

ID	Start time	Completion time	Do you support or oppo	(Optional) Why do you support or oppose the draft ch	(Optional) Do you have any additional feedback or questions you wo	What is your name?	Can we contact you if w	If you answered yes to C	What group(s), if any, ar	Are you responding as a	If applicable, have you b
2	10/10/22 16:09:26	10/10/22 16:10:32	Support	Fairness and equity - as needed everywhere wording needs review		Miryam Gordon	Yes	llltgal@gmail.com	Diversity Council, Low Bo	Individual	No
3	10/11/22 8:04:54	10/11/22 8:12:02	Support	Proposed amendment gives clarity, protects civil rights work, protects US Constitution	None. Excellent work. Framing GR12 within the regulation and mission of the WSBA is consistent. Personally, I have found GR12 (w/out amendment) a major obstacle in educating members of the Bar on legislative issues and current constitutional issues. This amendment will provide the clarity all members seek.	Molly P. Matter	Yes	Molly@amendlawmatter	Civil Rights Law Section, \	Individual	
4	10/11/22 9:09:36	10/11/22 9:11:19	Support	The Civil Rights Section has historically been constrained in what positions it can take and it is counterproductive to our collective voice as advocates.		Cameron Sheldon	Yes	Cameronasheldon@gma	Civil Rights Law Section	Individual	No
5	10/27/22 11:24:23	10/27/22 11:24:55	Support			Erin Jacobson	Yes	ejacobson@archbright.com		Individual	
6	10/27/22 11:51:58	10/27/22 11:54:27	Oppose	It feels like away for the WSBA to take positions on policy issues outside the administration of the courts or lawyers in the state.		Michael Farrell	Yes	michael.farrell42@gmail	Board of Law Examiners	Individual	No
7	10/27/22 15:10:36	10/27/22 15:18:23	Support			Ramina Dehkhoda-Steele	Yes	rdehkhoda@wongfleming.com		Individual	NA
8	10/27/22 15:10:23	10/27/22 15:23:02	Support	I agree that the proposed changes are more consistent with GR 12.1 as well as the SC's June 2020 letter, and helps to avoid the contradictions and impediments to justice caused by the current version of GR 12.2(c).		Min Kang	Yes	mkang@chdlawyers.com	KABA Washington	Individual	N/A
9	10/31/22 13:18:40	10/31/22 13:19:55	Support	I support the amendment for the reasons set forth in the analytical statement.		Coreen Wilson	Yes	coreenw@wieckwilson.c	WSBA Court Rules and Pr	Individual	
10	10/31/22 15:12:26	10/31/22 15:13:27	Support	This seems to properly align all the issues as described by the work group.		Miryam Gordon	Yes	llltgal@gmail.com 206-3	Diversity Council, Low Bo	Individual	No
11	11/1/22 16:14:08	11/1/22 19:33:42	Support	The analysis in the memo is compelling.		Lucinda Fernald	Yes	cinda.fernald@foster.cor	Committee on Professior	Individual	Not applicable
12	11/9/22 16:22:58	11/9/22 16:27:19	Support	MAMA Seattle supports furthering the Washington State Supreme Court's objectives as set forth in its June 4, 2020 letter.		Amy Klosterman	Yes	amy.klosterman@gmail.c	MAMA Seattle	On behalf of my group	Yes
13	11/10/22 11:38:08	11/10/22 11:40:34	Support		I am not sure why this change is strictly necessary based on the analytical statement alone; doesn't the clause "which do not relate to or affect the practice of law or the administration of justice" provide a hook for argument that the WSBA can take positions on certain political or social issues?	Michelle Maley	Yes	mmaley@perkinscoie.co	WSBA Rules Committee	Individual	
14	11/11/22 12:55:14	11/11/22 12:57:56	Support	KABA's mission is to serve the Korean, Korean American, and legal communities as a resource and a proponent of the interests, causes, and issues that are important for these communities and that may not get the attention or care that they otherwise deserve. In its early days, one of KABA's major purposes was to simply connect Korean-American attorneys with one another. *See document attached for full response.*		KABA	Yes	kabawaboard@gmail.cor	KABA (Korean American	On behalf of my group	Yes

Email	Do you support or oppose the draft changes to GR 12.2(C)?	Why do you support or oppose the draft changes to GR 12.2(C)?	(Optional) Do you have any additional feedback or questions you would like to share? If so, please include them below.	(Optional) What is your name?	(Optional) Can we contact you if we have questions about your feedback?	(Optional) If you answered yes to Question #5, what is your contact email and/or phone number?	(Optional) What group(s), if any, are you affiliated with?	(Optional) Are you responding as an individual or on behalf of your group(s)?	(Optional) If applicable, have you been authorized to respond on behalf of your group(s)?
anonymous	Oppose	Because this is a mandatory bar association. You shouldn't be taking on positions "on political or social justice issues" that do not relate to the practice of law or the administration of justice. That language should stay. I think the objectives of GR 12.1 or 12.2 are clear but I do not agree that the current language "prevents any WSBA section from doing what the Supreme Court has demanded all WSBA members do ...".	Please do not succumb to the temptation to remove this important language from the current rule and open the floodgates of taking positions on political and social issues that are unrelated to the practice of law or the administration of justice.						
anonymous	Support	On June 26, 2020, the Washington State Bar Association's Board of Governors responded to the call to action in the wake of the killing of George Floyd at the hands of Minneapolis Police to charter the WSBA's Equity and Disparity Work Group. For years, attorneys and other members of the legal community have complained about injustice in our profession and the unequal application of laws to minority members of our community. Although dialogue itself has value, the WSBA has contributed little in moving the needle from injustice to justice. Lawyers are the thread that holds the quilt of our society together, and at the moment the collective guidance and leadership of lawyers are needed more than ever. This is a good proposal and aligns GR 12.1 and GR 12.2, as well as follows the Court's directive to lawyers in their letter of June 4, 2020. Therefore, it is time to act. TThis will empower the bar to identify concrete solutions to persistent structural inequities inside the scope of GR 12.1 and to propose changes to the rules, regulations, and laws as needed. As I wrote to the Board in requesting that this Work Group be formed: "There is no equity without access to the justice our legal system can provide, and there is no access to justice without our profession doing its part to solve problems. It is up to each one of us to stand up and speak for others who cannot so that we may substitute true dialogue and good policy for violence in our society. That is the very point of an effective legal system, and as officers of that system we bear a large share of the burden in its failures if each of us do not work to ever reform it." While I wrote about individual responsibility, we have collective strength for solving problems as a bar - I believe if we ask the Supreme Court for this change they will approve it with thanks and recognition of your leadership on this issue.		Rajeev D. Majumdar	Yes	rajeev@whatcomlaw.com 360-332-7000	Attorneys, LAW Advocates, Washington State Bar Members, SABAW, QLAW, ABA, WSBF, Endowment for Equal Justice, Mount Baker Foundation, National Conference of Bar Presidents	Individual	No
anonymous	Oppose	The proposed rule change is based on a perspective that "systemic racism" is a universally accepted truth with respect to which the legal profession's regulatory apparatus must impose a general "moral obligation" in a manner consistent with the individual social/political ideologies of the Washington State Supreme Court and/or certain leaders or committee members within the WSBA. Such individual social and political ideologies/opinions do not (and should not) relate to or affect the practice of law or the administration of justice. Moreover, regulating the social/political moral opinions of legal professionals is well beyond the authority of the Court and WSBA. Therefore, professional rules should not be altered for purposes of social/political policy engineering by the Supreme Court or the WSBA. Social and political policy is the purview of the legislature. In this era of extreme political polarization and increasing mistrust of the legal system and judiciary, it is critical that the judiciary and the WSBA remain disciplined in focusing on fundamentals, to wit: separation of powers, eschewing personal bias, remaining neutral, etc. Undermining these principles is a means not justified by any end.			No		WSBA member	Individual	
anonymous	Oppose	I think it is inappropriate for WSBA to be making statements on matters. While some matters may be clear cut, many are likely up for interpretation as to what would be just or fair. Without clear guidance/limits (other than broad principles like justice and fairness), such statements will inevitably become political and not represent all WSBA members. WSBA should be focused on supporting WSBA members and the profession, not speaking out on political issues.		Rachel Morrison	No			Individual	
anonymous	Oppose	I've just spent 20 minutes trying to understand what is being proposed, and it's still unclear. I would appreciate a more concise explanation and oppose any changes until I understand what is being proposed and how it might affect the Keller deduction.							
anonymous	Oppose	I do not think mandatory bar associations should be in the business of politicizing their activities in the way that this modification will allow. The WSBA frequently takes positions on controversial issues at the legislature. This update will encourage even more activism, which distracts from the WSBA's primary mission and purpose.			No			Individual	

February 13, 2023

Dear WSBA Board of Governors and Equity and Disparity Workgroup:

The Diversity Equity and Inclusion (DEI) Council of the Washington State Bar Association endorses the thoughtful intentional work of the Equity and Disparity Workgroup and wholeheartedly endorses the rule change proposal that is before the Board and the Court.

The Washington State Supreme Court took a tremendous step in addressing DEI issues by enshrining a commitment to diversity in GR 12.2(a)(6) which states that one of the purposes of WSBA as an organization is to strive "*to promote diversity and equality in the legal profession.*"

The enactment of GR 12.2(a)(6) provided solid foundational underpinnings for WSBA to be able to proactively foster and maintain a more inclusive, diverse, legal profession in the State of Washington. It is the DEI Council's position that DEI advancement work, in this regard, is not just the work of the WSBA DEI Council and the Equity and Justice team staff at WSBA. It is, rather, and should be, the continuing work of all within the collective organizational sphere of WSBA, including the Board of Governors (BOG), the Court-appointed Boards, the Committees, Councils, and other BOG related entities. Because this work is so important, it is critical that our General Rules be clear, unambiguous, and consistent with each other.

GR 12.2(c)(2) provides that WSBA should *"not take political or social positions that do not relate to or affect the practice of law or administration of justice."*

This rule is often interpreted and used by opponents of DEI initiatives to challenge WSBA's ability to fulfill the purpose of promoting equality and diversity as expressly stated in GR 12.2(a)(6).We often hear comments that 1) DEI issues are inherently political and /or social or ideological, 2) that these issues are not within the appropriate purview of the Bar, and that 3) a commitment to DEI leaves our Bar open to constitutional challenges based on freedom of speech and freedom of association.

It is difficult to maintain a stance that DEI issues are not political or social and because of that, GR 12.2 (c)(2) and GR 12.2(a)(6) seem to be at odds. The proposed rule change suggested by the Equity

and Disparity Workgroup provides an elegant solution to the problem of these two potentially conflicting rules.

By removing the prohibition on the Bar from "taking political and social positions" in *GR 12.2 (c)(2)* and rewording it to state instead that "the Bar shall not take positions which do not relate to or affect the regulatory purposes of GR 12(1)", the Bar will be able to continue to support and promote diversity as part of its regulatory mandate. GR12(1) includes but is not limited to the protection of the public, as well as the advancement of the administration of justice. It is the DEI Council's position that the promotion of diversity, equity, and inclusion both protects the public and advances the administration of justice. DEI efforts by the Bar to attempt to remediate biased and unjust aspects of our system of justice can only ameliorate the administration of justice as inequity and bias negatively impact both the public and Washington's system of justice as a whole.

Without straying too far into the weeds of constitutional case law relating to bar associations and permissible germane activities, per the Keller test, we believe that the Texas case of McDonald v Longley, 4 F.4th 229 (5th Cir. 2021), is instructive. In that case, the Fifth Circuit Court, citing Keller, held that the Texas Bar's diversity initiatives whose purpose is to create"…a fair and equal legal profession for minority, women, and LGBT attorneys," is germane to the practice of law and thus permissible. (*McDonald* at 249). The Court further agreed that another legitimate purpose served by the Bar's diversity initiatives was "to help build and maintain the public's trust in the legal profession and the judicial process as a whole." (*McDonald* at *250*)

We submit that the proposed rule change to GR 12 will serve to resolve the inconsistencies between the rules with respect to diversity and will further the Associations' mission to attend to the administration of justice and to protect the public.

Respectfully submitted by Sunitha Anjilvel Co-Chair on behalf to the WSBA Diversity Council.

WASHINGTON STATE BAR ASSOCIATION

IMPORTANT:
Please refer to the
BOG Action Item Guide
when completing this template.

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Pamela Anderson, Chair, Committee on Professional Ethics, Hugh D. Spitzer, CPE Subcommittee Chair

DATE: July 26, 2023

RE: Proposed New Comments to RPC 1.2 and RPC 8.4 Regarding Reproductive Rights

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Recommendation that Board of Governors suggest, to the Washington State Supreme Court, the adoption of revised Comments to RPC 1.2 and 8.4 in an updated form based on Board of Governors' 6/23/23 Meeting.

At its June 23, 2023, meeting, the Board of Governors considered a proposal from the Committee on Professional Ethics regarding additional Comments to RPC 1.2 and 8.4. The new Comments were originally suggested in a narrower form by the Attorney General's Office. That office recommended adjustments to RPC 1.2 and 8.4 meant to address situations in which a Washington lawyer gives advice which is treated by a prosecutor in another jurisdiction as possible criminal activity. An example would be advising a health care provider, a parent or minor child, or victim of sexual assault, practicing or residing in Idaho about providing or obtaining an abortion in Washington.[1] In such a scenario, an opposing party, family member, political group, member of the public, or prosecutor might file one or more disciplinary grievances against the Washington lawyer.

As we observed in our June 12, 2023, Memorandum to the Board of Governors, private citizens, attorneys general, and prosecutors in some jurisdictions already are acting to zealously enforce statutes criminalizing access to reproductive health services.[2] Efforts to restrict access to reproductive health care

[1] *See* Richard Hunt, Ethics Implications of Dobbs for Law Firm Management and Client Counseling, American Bar Association (Aug. 22, 2022) ("It is not difficult to imagine prosecutors seeking records of client communications related to abortion discussions and invoking one of the crime-related exceptions to the confidentiality obligation or privilege to obtain those records."), accessed at: https://www.americanbar.org/groups/litigation/committees/ethics-professionalism/articles/2022/ethics-implications-dobbs-law-firm-management-client-counseling/ on Mar. 23, 2023.

[2] These potential threats to Washington lawyers are not limited to criminal prosecution. On January 5, 2023, Idaho's Supreme Court upheld a "bounty hunter" provision that authorizes "certain family members of the fetus" to file a civil claim for $20,000 or more in damages—potentially including actions against those who have supported access to legal medical services in Washington. Attorneys general are currently litigating to ensure access to reproductive health medication even in jurisdictions with strong reproductive health protections. *See* Michel Martin & Gurjit Kaur, Washington State Attorney General Says FDA Rules on Abortion Drug Are Unreasonable, https://www.npr.org/2023/02/25/1159565357/washington-state-attorney-general-says-fda-rules-on-abortion-drug-are-unreasonab. In domestic relations law matters involving parties from faith communities with sharply differing values about pregnancy and gender, "bounty hunter" statutes pose an active threat of litigation which could chill lawyers' willingness to provide legal advice in high-conflict domestic relations disputes.

have expanded rapidly beyond the purview of criminal law.[3] Further, in jurisdictions that criminalize reproductive health care and assistance to patients/clients, law enforcement routinely investigates these "crimes" using digital evidence.[4] Washington lawyers thus would have credible concern that law enforcement outside of Washington would investigate conduct associated with advice given by Washington attorneys on Washington reproductive rights law.[5] In addition, Washington lawyers should not expect that abortion-ban statutes enacted outside Washington state would include express exceptions for communications between lawyers and clients.

Two primary RPCs are involved here. RPC 1.2(d) states:

> A lawyer shall not counsel a client to engage, or assist a client, in conduct that the lawyer knows is criminal or fraudulent, but a lawyer may discuss the legal consequences of any proposed course of conduct with a client and may counsel or assist a client to make a good faith effort to determine the validity, scope, meaning or application of the law.

Comment [5] to RPC 1.2 notes:

> Legal representation should not be denied to people who are unable to afford legal services, or whose cause is controversial or the subject of popular disapproval. By the same token, representing a client does not constitute approval of the client's views or activities.

RPC 8.4 (b) states that it is professional misconduct for a lawyer to "commit a criminal act that reflects adversely on the lawyer's honesty, trustworthiness or fitness as a lawyer in other respects…."[6]

Comment [18] to Washington's RPC 1.2 currently addresses "Special Circumstances Presented by Washington's Marijuana Laws" as follows:

> [18] Under Paragraph (d), a lawyer may counsel a client regarding Washington's marijuana laws and may assist a client in conduct that the lawyer reasonably believes is permitted by those laws. If Washington law conflicts with federal or tribal law, the lawyer shall also advise the client regarding the related federal or tribal law and policy.

Comment [8] to Washington's RPC 8.4 current states:

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[3] See Lauren Giella, Why Texas is Able to Ban Abortion Pills for the Entire U.S. https://www.newsweek.com/why-texas-able-ban-abortion-pills-entire-us-1780936.

[4] *See* Runa Sandvik, How U.S. Police Use Digital Data to Prosecute Abortions https://techcrunch.com/2023/01/27/digital-data-roe-wade-reproductive-privacy/ .

[5] Regarding the impact of legal threats on providers' willingness to assist patients/clients with reproductive rights services, s*ee*, https://www.newyorker.com/magazine/2023/05/15/the-problem-with-planned-parenthood.

[6] Note that RPC 8.4(i) makes it professional misconduct to "commit any act involving moral turpitude . . . or other act that reflects a disregard for the rule of law. . .".

> [8] A lawyer who counsels a client regarding Washington's marijuana laws or assists a client in conduct that the lawyer reasonably believes is permitted by those laws does not thereby violate RPC 8.4. See also RPC 1.2 Washington Comment [18].

At its June 23, 2023, meeting, the Board of Governors asked the CPE to draft Comments to these two RPCs that were broader than our original proposal, which had focused solely on reproductive rights. Specifically, the Board asked that the CPE consider revising and extending the scope of the proposal, consistent with the Board's discussion. That discussion included reference to possible Comment language protecting Washington lawyers when they give advice on any conduct that the lawyers reasonably believe is permitted by Washington laws, and potentially referencing advice on reproductive rights and gender-affirming treatment as examples. At least one member of the Board of Governors asked that we review a recent recommendation of Oregon's Legal Ethics Committee and that state bar's board of governors, a recommendation that would replace language referencing Oregon's RPC 1.2 language regarding marijuana laws with broader, more generic language.[7]

After further consideration, the CPE has concluded that the Board of Governors should recommend, to the State Supreme Court, revised versions of comments to RPC 1.2 and RPC 8.4 that would replace the two existing "special circumstances" Comments referenced above. The replacement Comments will include broader language that encompasses more than just advice on Washington's cannabis laws. The Comments to be replaced were adopted in 2014 (updated in 2018 and 2023) to provide a safe harbor to Washington lawyers who advise clients on Washington marijuana laws, notwithstanding the fact that cannabis is a controlled substance under federal law and many tribal laws. The Board of Governors has recognized that the issues of criminalized reproductive care and gender-affirming care in neighboring states presents similar though more fundamental, practical, and urgent questions under the RPCs for members of the Washington bar.

The recommendation below reflects the Board of Governors' recent directions to the CPE. It also borrows in part from the recent Oregon Legal Ethics Committee recommendation to the Oregon State Bar's Board of Governors. It should be observed that Oregon's RPCs contain no comments. We continue

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[7] Based on a recommendation of the Oregon Legal Ethics Committee, the Oregon State Bar's board of governors has recommended an amendment to RPC 1.2(d) as follows:

> (d) Notwithstanding paragraph (c), a lawyer may counsel and assist a client ~~regarding Oregon marijuana-related laws~~ in a proposed course of conduct that the lawyer reasonably believes is permitted under Oregon law. In the event Oregon law conflicts with federal law ~~or tribal law~~ the law of another jurisdiction, the lawyer ~~shall~~ may also advise the client regarding ~~related federal and tribal law and policy~~ such conflict and the potential legal consequences.

to recommend that rather than amending a Washington RPC that is identical to ABA Model Rule 1.2, we simply adjust the relevant comments to RPC 1.2 and RPC 8.4.

A revised version of Comment [18] to RPC 1.2 should be worded along the lines of the following:

> *Additional Washington Comment [18]. Special Circumstances Involving Advice and Assistance About Washington Laws*
>
> [18] Under Paragraph (d), a lawyer may counsel a client regarding ~~Washington's marijuana~~ Washington laws and may assist a client in conduct that the lawyer reasonably believes is permitted under those laws (for example and without limitation, Washington laws related to reproductive health care services, gender-affirming care, or marijuana). If Washington law conflicts with federal law~~, or tribal law,~~ or the law of another jurisdiction, the lawyer shall also advise the client regarding the ~~related federal or tribal law and policy~~ conflicting laws or recommend that the client seek the advice of a lawyer with established competence in the field in question. See Comment 1 to Rule 1.1. If a lawyer counsels or assists a client regarding Washington's laws in these circumstances, that conduct, and the predominant effect of the conduct, shall be deemed to occur in Washington for purposes of these Rules.

A revised Comment [8] to RPC 8.4 should also be proposed, as follows:

> *Washington Comment* [8] *to Rule 8.4*
>
> A lawyer who counsels a client regarding Washington laws ~~Washington's marijuana laws~~ or assists a client in conduct that the lawyer reasonably believes is permitted by those laws (for example and without limitation, Washington laws related to reproductive health care services, gender-affirming care, or marijuana), does not thereby violate RPC 8.4. See also Washington Comment [18] to RPC 1.2.

A clean and a redline version of Comment [18] to Rule 1.2 and Comment [8] to Rule 8.4 accompanies this memo. We would be pleased to provide additional information to the Board of Governors if that would be helpful.

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

The Committee on Professional Ethics (CPE), responding to a request of the Attorney General of Washington, recommends that the Board of Governors approve adding a comment to RPCs 1.2 and 8.4 to clarify that a Washington lawyer does not violate the Washington RPCs by advising or counseling a client regarding Washington laws, including Washington's reproductive health care laws.

The updated proposed comment is no longer specific to reproductive health care as that is only one instance of a Washington law that differs from other state or federal law. Adding a narrow comment to the RPCs relating to one substantive area could appear to be politically motivated. Reproductive rights are at issue in many states and political campaigns presently. Acting based on this narrow substantive area at this time could appear political. A comment addressing the general circumstance responds to the concern raised by the AGO with less risk of appearing political. Additionally, a broader comment avoids the need to have several exceptions or comments to these rules relating to each differing law.

As noted previously, the Legal Ethics Committee of the Oregon State Bar recommended that their Board of Governors adopt the following modification to the language of Oregon's RPC 1.2:

(c) A lawyer shall not counsel a client to engage, or assist a client, in conduct that the lawyer knows is illegal or fraudulent, but a lawyer may discuss the legal consequences of any proposed course of conduct with a client and may counsel or assist a client to make a good faith effort to determine the validity, scope, meaning or application of the law.

(d) Notwithstanding paragraph (c), a lawyer may counsel and assist a client ~~regarding Oregon marijuana-related laws~~ in a proposed course of conduct that the lawyer reasonably believes is permitted under Oregon law. In the event Oregon law conflicts with federal law or ~~tribal law~~ the law of another jurisdiction, the lawyer ~~shall~~ may also advise the client regarding ~~related federal and tribal law and policy~~ such conflict and the potential legal consequences.

This change was explained in a memo prepared for the June 23, 2023; Oregon State Bar Board of Governors meeting as follows:

> The LEC reviewed the request from the Cannabis and Psychedelics Executive Committee in December 2022, and noted that a broader fix may be necessary to prevent the LEC from revisiting the issue each time there is a conflict between federal and state law. Additionally, there is a new concern about conflicting state laws between states, especially with recent events creating conflicting laws between states related to the advising of clients related to reproductive rights that may be legal within Oregon, but illegal in other jurisdictions.

The memo quoted above is available for review if requested. This language is included only to demonstrate how one other State Bar is considering a similarly broad approach to this issue, which may minimize the appearance of making a political statement or choice.

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

The fiscal impact to WSBA resulting from the proposed recommendation is limited to the amount of staff time used to incorporate any approved changes to the impacted records. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and would not require additional staff or allocation of resources from other internal sources.

WSBA EQUITY ANALYSIS: *This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.*

It appears that CPE considered who may be most impacted by the proposal, identifying not only attorneys considering giving legal advice to people about their reproductive rights but also marginalized client communities. These communities predominantly include people at risk from an unwanted or medically harmful pregnancy (who include women and children are who victims of sexual assault) and underserved communities who experience poverty and systemic inequalities. While CPE did not seek direct input from client communities possibly given the nature of the sensitivity of the legal issues, and because the Attorney General made a request, CPE did do research to determine who may be the most impacted groups. The proposal appears to remove a potential chilling effect on lawyers to provide legal assistance in reproductive rights matters, which ultimately advances fairer outcomes for marginalized communities.

Committee on Professional Ethics Proposed Changes to Comment [18] to RPC 1.2 and Comment [8] to RPC 8.4 (Redlined against current versions of Comments)

Additional Washington Comment [18]. Special Circumstances ~~Presented by Washington's Marijuana Laws~~ Involving Advice and Assistance About Washington Laws

[18] Under Paragraph (d), a lawyer may counsel a client regarding ~~Washington's marijuana~~ Washington laws and may assist a client in conduct that the lawyer reasonably believes is permitted under those laws (for example and without limitation, Washington laws related to reproductive health care services, gender-affirming care, or marijuana). If Washington law conflicts with federal law~~, or tribal law,~~ or the law of another jurisdiction, the lawyer shall also advise the client regarding the ~~related federal or tribal law and policy~~ conflicting laws or recommend that the client seek the advice of a lawyer with established competence in the field in question. See Comment 1 to Rule 1.1. If a lawyer counsels or assists a client regarding Washington's laws in these circumstances, that conduct, and the predominant effect of the conduct, shall be deemed to occur in Washington for purposes of these Rules.

Washington Comment [8] *to Rule 8.4*

A lawyer who counsels a client regarding Washington laws ~~Washington's marijuana laws~~ or assists a client in conduct that the lawyer reasonably believes is permitted by those laws (for example and without limitation, Washington laws related to reproductive health care services, gender-affirming care, or marijuana), does not thereby violate RPC 8.4. See also Washington Comment [18] to RPC 1.2.

Committee on Professional Ethics Proposed Changes to Comment [18] to RPC 1.2 and Comment [8] to RPC 8.4 (Clean version after proposed changes)

Additional Washington Comment [18]. Special Circumstances Involving Advice and Assistance About Washington Laws

[18] Under Paragraph (d), a lawyer may counsel a client regarding Washington laws and may assist a client in conduct that the lawyer reasonably believes is permitted under those laws (for example and without limitation, Washington laws related to reproductive health care services, gender-affirming care, or marijuana). If Washington law conflicts with federal law or the law of another jurisdiction, the lawyer shall also advise the client regarding the conflicting laws or recommend that the client seek the advice of a lawyer with established competence in the field in question. See Comment 1 to Rule 1.1. If a lawyer counsels or assists a client regarding Washington's laws in these circumstances, that conduct, and the predominant effect of the conduct, shall be deemed to occur in Washington for purposes of these Rules.

Washington Comment [8] *to Rule 8.4*

A lawyer who counsels a client regarding Washington laws or assists a client in conduct that the lawyer reasonably believes is permitted by those laws (for example and without limitation, Washington laws related to reproductive health care services, gender-affirming care, or marijuana), does not thereby violate RPC 8.4. See also Washington Comment [18] to RPC 1.2.

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors

From: Tiffany Lynch, Director of Finance

Re: FY 2024 Budgets – 2nd Draft

Date: July 21, 2023

The Board of Governors reviewed the first draft of the FY24 budget at their meeting in June and were asked to provide guidance in developing the second draft by responding to questions focused on the following key topics: use of reserves; staffing philosophy; budget approach for potential items with undetermined fiscal impact; funding for future WSBA facilities; ability to review a draft budget that incorporates a successful renegotiation of WSBA's lease at Puget Sound Plaza; and license fees. The Board reaffirmed its position that the FY24 budget should be prepared assuming WSBA would prudently use its available reserves to support operations, while maintaining the license fee rate of $458. Taking that feedback into consideration, we have incorporated several budget requests into the second draft that reflect our continued refining of budget figures, updated information, and executive level prioritization and decision-making.

BUDGET COMPARISON: FIRST DRAFT vs SECOND DRAFT

ALL FUNDS BUDGET[1]	FIRST DRAFT	SECOND DRAFT	Difference
REVENUE	$24,622,267	$25,419,274	+$797,007
EXPENSE	$25,683,609	$26,606,122	+$922,513
NET INCOME/(LOSS)	**($1,061,342)**	**($1,186,848)**	**+$125,506**

The second draft of the FY24 WSBA budget includes all four funds: (1) General Fund, (2) CLE Fund, (3) Client Protection Fund, and (4) Sections Funds. Each has its own designated reserves which are either added to or reduced each year depending on the financial operating results of the designated cost centers.

(1) GENERAL FUND

The General Fund captures the majority of WSBA's work, including regulatory functions and most services to members and the public. License fees is the primary source of revenue that supports the 38 cost centers within the General Fund. The draft FY24 General Fund budget is based on attorney license fees of $458, which has been set at the same rate since 2020. (*See attachment A for General Fund detailed cost center budgets.)*

General Fund Budget	FIRST DRAFT	SECOND DRAFT	Difference
▪ Revenue	$22,284,537	$22,484,537	+$200,000
▪ Expenses	$23,392,298	$23,470,242	+$77,944
▪ Net Income/(Loss)	($1,107,761)	($985,705)	($122,506)
▪ **Projected Reserves**	**$2,344,308**	**$2,466,364**	**+$122,506**

[1] Second draft incorporates Sections budgets (first draft did not).

(2) CLE FUND

The CLE Fund is a board-designated operating reserve, consisting of net income from the CLE activities, to cover net loss and extraordinary costs of CLE programs, products, and/or capital acquisitions as needed. The draft FY24 CLE Fund Budget consists of three cost centers: (1) CLE Products; (2) CLE Seminars; and (3) Deskbooks. (*See attachment B for CLE Fund detailed cost center budgets.)*

CLE Fund Budget	FIRST DRAFT	SECOND DRAFT	Difference
▪ Revenue	$1,741,800	$1,741,800	$0
▪ Expenses	$1,600,601	$1,592,400	($8,201)
▪ Net Income/(Loss)	$141,199	$149,400	+$8,201
▪ **Projected Reserves**	**$1,400,483**	**$1,408,684**	**+$8,201**

(3) CLIENT PROTECTION FUND (CPF)

The Client Protection Fund (CPF) is a legally restricted fund created in 1995 by the Washington Supreme Court and WSBA to make gifts to compensate those financially victimized by lawyer dishonesty or failure to account for client funds or property. It is principally funded by an annual assessment on all active members and *pro hac vice* admissions as required by the Washington Supreme Court. (*See attachment C for Client Protection Fund detailed cost center budgets.)*

Client Protection Fund Budget	FIRST DRAFT	SECOND DRAFT	Difference
▪ Revenue	$595,930	$595,930	$0
▪ Expenses	$690,710	$689,498	($1,212)
▪ Net Income/(Loss)	($94,780)	($93,568)	($1,212)
▪ **Projected Reserves**	**$4,014,509**	**$4,015,721**	**+$1,212**

(4) SECTIONS FUND

The FY24 Section budgets reflect revenue mainly for membership dues and CLE seminar profit sharing. Expenses vary depending on the Section's work plan for the year and include the $18.73 FY23 Per-Member Charge (PMC) (an increase of $1.07 from FY23), which was approved by the Budget and Audit Committee in April. While the majority of Sections submitted a first draft, budgets that reflect a $0 budget for FY24 remain outstanding. We expect that there will be some changes made between the first draft and final drafts in August, including updates for sections who have not yet submitted a budget. (*See attachment D for Section Funds detailed cost center budgets.)*

Additionally, we have received one request to change membership dues from the World Peace Through Law Section. The section is requesting a reduction in the annual dues amount from $30 to $25 effective January 1, 2024. Dues change requests are approved by the Board of Governors, with recommendation from the Budget and Audit Committee. *(See attachment E for request.*)

Sections Funds Budget	FY 2023	FY 2024 FIRST DRAFT	Difference
▪ Revenue	**$649,695**	**$597,007**	**($52,688)**
▪ Expenses	**$904,646**	**$853,982**	**($50,664)**
▪ Net Income/(Loss)	**($254,951)**	**($256,975)**	**+$2,024**
▪ **Projected Reserves**	**$1,547,699**	**$1,290,724**	**($256,975)**

CAPITAL BUDGET

The FY24 Capital Budget includes the cost of purchasing, refreshing and/or replacing outdated hardware and software as needed. Capital labor costs involve in-house development, customization, and/or upgrades to systems and projects. Anticipated FY24 projects include the development and implementation of three systems: (1) replacement of the Discipline records system (GILDA), (2) MCLE System enhancements, and (3) a new Law Clerk database system. The Capital Budget also includes the cost of purchasing, refreshing and/or replacing infrastructure hardware and leasehold improvements. *(See attachment E for capital budget details.)*

KEY AREAS OF CHANGE

Provided below is a list of the key areas of change between the first and second drafts of the FY24 budgets, followed by relevant narrative information.

Revenue Changes from First Draft FY24 Budget	Budget Impact
GENERAL FUND:	**+$200,000**
▪ **Interest Income**: increased to account for higher interest rates locked into investments that mature throughout FY24.	+$200,000
SECTIONS FUND:	**+$597,007**
▪ **Membership Dues**: First draft did not include Section budgets. Dues budget variance from FY23 to FY24 is a reduction of $54,545.	+$385,680
▪ **Seminar Profit Share:** First draft did not include Section budgets. Revenue budget variance from FY23 to FY24 for seminar profit share is a reduction of $29,145.	+$118,325
▪ **Other Revenue:** Includes a variety of items such as interest income, publications revenue, mini-CLE revenue, etc.	+$93,002
Total Increase in Revenue from First Draft	**+$797,007**

Indirect Expense Changes from First Draft FY24 Budget	Budget Impact
SALARIES:	**+$21,511**
▪ **Salaries:** Increase for 3.0 FTE (offset by a reduction in temporary employee costs, see narrative for further details)	+$153,891
▪ **Bonus Incentive Plan & Pool for Mid-Year Adjustments**	($30,000)
▪ **Temporary Employees:** reduced in exchange for hiring of 1.0 FTE for MCLE and reduction of funds for unanticipated temporary employees	($98,320)
▪ **Insurance Rebate:** funds available to offset staffing costs related to development of ethics credit programs	($4,060)
BENEFITS:	**($74,667)**
▪ **FICA:** increase tied to change in salaries expense	+$13,003
▪ **Medical:** increase from addition of 3 FTE	+$20,500
▪ **Retirement:** decrease tied to reduction of rate from 10.39% to 9.39%	($112,412)
▪ **Unemployment, L&I, and WA Family Leave Insurance:** increased tied to change in salaries expense	+$4,242
OTHER INDIRECTS:	**+$50,458**
▪ **Computer Pooled Expenses:** Inclusion of funds to support move to cloud-based infrastructure (see narrative for further details)	+$100,000

▪ **Professional Fees-Legal:** reduced to align with historical spending	($50,000)
▪ **Depreciation:** net change for updated depreciation start dates for computer software	+$458
Total Decrease in Indirect Expense from First Draft FY24 Budget	**($2,698)**

Direct Expense Changes from First Draft FY24 Budget	Budget Impact
GENERAL FUND: (*see narrative for further details)	**+$71,229**
▪ **Small Town and Rural Committee Outreach & Activities (MSE)*:** increase to support activities of the STAR committee	+$55,000
▪ **Donations/Sponsorships/Grants (PSP)* :** Increase for Moderate Means Program funding	+$14,169
▪ **Diversity Events & Projects (DIV)*:** funds to support DEI Council Pipeline to the Profession Summit	+$10,000
▪ **Chief Hearing Officer (OGCDB)*:** increase to contract fee	+$10,000
▪ **Bar Examiner Fees (ADMISS)*:** increase to stipends paid to bar exam graders	+$9,200
▪ **Insurance Rebate (LLB):** funds available to offset costs related to ethics credit programs	($258)
▪ **Custodianships (OGC):** reduced based on historical actual expenses	($4,000)
▪ **Character & Fitness Board Expense (CFB):** reduced based on updated estimate for number of hearings	($6,000)
▪ **Depreciation (MCLE):** reduced based on revised start date of depreciation for software currently in development	($16,882)
SECTIONS FUND:	**+$853,982**
▪ **Direct Expenses of Section Activities**	+$607,200
▪ **Reimbursement to WSBA for Indirect Expenses (Section Per-Member Charge)**	+$246,782
Total Decrease in Direct Expense from First Draft FY24	**$925,211**

1) ***Salaries:*** A total of 3.0 FTE have been identified to include in the second draft of the budget.

- *Event Specialist (1.0 FTE)*: This position allows for additional capacity for event planning and support for the Board of Governors and the Executive Director. Over the past few years, the workload has increased reflecting a greater emphasis by the Board in relationship building through events and gathering. This has resulted in an increase in Board related events, meetings, and retreats overall, as well as held in locations other than the WSBA office. Additionally, with the hiring of the Deputy Executive Director whose role is focused on operations, the Executive Director is able to focus on external relations and requires additional support.

- *Diversity, Equity, and Inclusion Staff (1.0 FTE):* This position would 1) add capacity to conduct equity analyses for all proposed BOG actions and train entities to apply an equity lens to their work; and 2) create capacity to support members and future members. While the Equity and Justice Team currently provides some DEI resources to the membership, most of its time is focused on supporting volunteer and advancing institutional initiatives. With additional staff, there will be capacity to develop and offer DEI resources to the broader membership, provide dedicated support to members from underrepresented and marginalized communities, focus attention on creating more accessible pathways to the legal profession, offer dedicated support for data analysis of demographic information to advance institutional DEI goals, and improve the accessibility of WSBA for the public, members, and prospective members.

- *RSD Analyst for MCLE (1.0 FTE)*: This position is needed to support an increased workload that has surpassed current staffing levels and to ensure our regulatory duty of timely and accurate

review and management of the MCLE requirements for all members. The MCLE team, which is comprised of four analysts and a manager, is responsible for processing a high volume of member and sponsor MCLE applications throughout the year. In addition to reviewing activity applications, the team is tasked with tracking member compliance with APR 11, which leads to a seasonal increase in workload. Every year, two to three temporary staff join the MCLE team during certification season to assist with ensuring accurate and timely review of approximately 11,000 member certifications. However, the need for additional support is no longer limited to the "busy" season of certification. In fact, we have been consistently extending the assignment of one of the MCLE temps beyond their initial end date and have a pending request to extend their assignment through the end of the fiscal year. Additional yearlong support will help us 1) provide a better turnaround time for application review and consequently a better experience for members and sponsors, 2) perform CLE audits on a regular basis, as authorized by APR 11, 3) more actively monitor accredited sponsor compliance with MCLE rules, and 4) continue to provide adequate support to the MCLE Board. The addition of this FTE is offset by a reduction in seasonal temporary staffing costs that WSBA has carried in this year's and prior year's budgets.

2) ***Cloud Infrastructure ($100,000):*** These funds will be used to support the transition of WSBA IT network infrastructure from on-premises technology to a cloud-based solution. With a significant portion of the WSBA's workforce operating remotely, a cloud-based solution would allow for resolving infrastructure issues remotely rather than requiring onsite presence. It will also provide a more stable solution to support business continuity and is best suited to support multiple office locations, which should be considered for future WSBA facilities options.

3) ***Small Town and Rural (STAR) Committee Outreach and Activities ($55,000):*** The STAR Committee has outlined activities for FY24 which include an increase of $5,000 to support outreach events and job fairs, $10,000 to hold a stakeholder summit, and $40,000 to develop a pipeline/placement program.

4) ***Moderate Means Program ($14,169):*** The Moderate Means Program is housed at each of the three law schools in Washington and is supported through grants from the WSBA. The FY24 budget accounts for requested funds to support the increased cost of labor/benefits at each law school and a decrease in the expense for the data coordinator position as that role will be more streamlined going forward.

5) ***DEI Council's Pipeline to the Profession Summit ($10,000):*** Outlined in the DEI Council's Charter is its work is to increase and support members from underrepresented communities by developing and supporting pipeline and mentorship programs and partnering with schools, students and members from underrepresented communities. The DEI Council has been researching existing programs designed to create more access for underrepresented communities to join the legal profession. The goal of the research is to identify existing programs to promote, and gaps that the WSBA may fill. To advance their goal, the DEI Council would like to organize a summit in FY 24 that brings together people who are engaged or interested in creating pathways to the profession, to facilitate collaboration, and to identify ways WSBA can advance these goals.

6) ***Chief Hearing Officer ($10,000):*** The Office of General Counsel- Disciplinary Board cost center includes budgeted funds to pay a Chief Hearing Officer due to the role and workload associated with the position. The work of the Chief Hearing Officer is detailed in court rules under ELC 2.3 (e). This budget line is based on a contracted amount (set at $30,000 in FY23) and the request is being made to increase the contract amount in line with inflation because it has remained the same since 2011.

7) ***Examiner Fees ($9,200):*** WSBA provides stipends to Bar Exam graders in the amount of $750 per exam and $1,200 per exam for the Chair and Vice-Chair of the Board of Bar Examiners (BOBE). The stipend amounts were set in 2013 when WSBA transitioned to the Uniform Bar Exam and have not changed since that time. The BOBE requested the increase in the stipend amount to $1,000 for each of the estimated 32 graders and $1,500 each for the Chair and Vice-Chair. It has been 10 years since the initial stipend was established and the proposed increase is in line with inflation. Additionally, the BOBE has not been able to fill positions on the Board and believe that increasing the stipend could help with recruitment.

FY24-FY26 GENERAL FUND FISCAL PROJECTIONS

Fiscal projections through FY26 have been updated using the second draft FY24 budget figures and reflect the assumptions provided below. Currently, the General Fund includes two Board designated reserves with balances totaling $4.7 million: (1) Operating Reserve of $2.0 million and (2) Facilities Reserve of $2.7 million. All remaining general fund balances are undesignated and therefore considered "unrestricted." Budgeting a net loss reflects a purposeful use of the WSBA's reserves. The chart below demonstrates the impact on WSBA's unrestricted reserves based on the projected annual use of reserves if actual financial results match the budget/projection. The table also includes estimates assuming that we will outperform the budget by $600,000, a figure that is based on WSBA's historic actual performance.

GENERAL FUND PROJECTIONS FY2023 - FY2026 LICENSE FEES @ $458				
	FY23 PROJECTIONS	FY24 BUDGET- 2ND DRAFT (JULY 2023)	FY25 PROJECTIONS	FY26 PROJECTIONS
BEGINNING CYCLE FUND BALANCE	8,713,268	9,513,301	8,527,596	6,280,869
REVENUE	22,502,197	22,484,537	22,485,356	22,756,306
Licensing Revenue	16,902,689	17,320,499	17,437,317	17,618,537
Other Revenue	5,599,508	5,164,038	5,048,039	5,137,769
EXPENSES	21,702,164	23,470,242	24,732,084	25,749,464
Direct	2,435,164	2,753,412	2,863,550	2,978,092
Indirect	19,267,000	20,716,830	21,868,534	22,771,372
NET INCOME/(LOSS) AND ANTICIPATED USE OF RESERVES	800,033	-985,705	-2,246,728	-2,993,158
RESERVE BALANCE OFFSET	0	985,705	2,246,728	2,993,158
NET OPERATING RESULT	800,033	0	0	0
FY24-FY26 General Fund Balance	9,513,301	8,527,596	6,280,869	3,287,711
Operating & Facilities Restricted Reserves	4,700,000	4,700,000	4,700,000	4,700,000
Remaining Unrestricted Reserves	4,813,301	3,827,596	1,580,869	-1,412,290
Remaining Unrestricted Reserves w/$600K offset	4,813,301	4,427,596	2,780,869	387,711

Assumptions

Revenue:

- No change to the license fee rate of $458 through 2026.
- Average increase in License Fees revenue of 1% annually to account for net increase in membership. Previous projections assumed a 2% increase, however data from the 2023 attorney licensing renewals reflect a pattern of decline in the net number of attorneys licensed and projections have been adjusted accordingly.
- All other revenue sources average a 1% increase in revenue annually, reduced from 2% in prior projections. We expect many of our revenue sources to remain relatively static based on current trends, with small increases of 1-2% in select areas.

Expense:

- Salaries: the FY25 projections include a 2% increase to the midpoint of the compensation grid (a market-based adjustment for all positions) and no change to the grid in FY26. The annual increased costs support movement through the compensation grid for all positions, offset by savings due to attrition.
- No additional FTE
- Corresponding increase in taxes and benefits tied to projected salary increases.
- Average increase in medical costs of 4% each year.
- Average increase in all other benefits of 3% each year.
- Rent: assume that the WSBA will remain in the current Puget Sound Plaza lease through December 2026 (no early reduction in space size or subleasing).[2]
- Average increase in direct expenses of 4% each year.

Because we have maintained a static license fee of $458, there is minimal revenue growth. At the same time, it is expected that costs will rise every year from inflation and the increasing cost of labor. The majority of WSBA's expenses support staffing costs for salaries, benefits, and payroll taxes. WSBA compensation is driven by market rates, which have increased significantly over the past few years. Per the U.S. Bureau of Labor Statistics, wages and salaries costs for private industry workers in the Seattle Metropolitan area increased by 5.9% in 2023, 4.5% in 2022, and 2.6% in 2021 (based on March/Q1 reporting over a 12-month period). Additionally, the Employment Cost Index for state and local government workers (which measures inflation of wages and employer paid benefits) reported an overall increase of 4.9% as of Q1 2023, 4% in 2022, and 2.23% in 2021. When comparing this to WSBA's actual indirect expenses for FY21, FY22, and budget for FY23, the average increase over the 3-year period is 2.78% (-3.88% in FY21, +4.93% in FY22, and +7.28% in FY23). Our projections for indirect expenses are increases of 5.6% in FY25 and 4.1% in FY26, which are in line with current data. Direct expenses (not staff related) have also increased over time and have been impacted by inflation and changes to programs and services. When looking at the Consumer Price Index for the Seattle-Tacoma-Bellevue area (which is a measure of the average change over time in the prices paid by urban consumers for consumer goods and services), that data shows prices increasing by 4.6% as of June 2023, 10.1% in 2022, 5.5% in 2021 (based on June reporting over a 12-month period). When comparing this to WSBA's historical actual direct expenses for FY21 and FY22, and budget for FY23, the average increase over the 3-year period is 10.2% (-7.4% in FY21, 1% in FY22, and 36.9% in FY23). Direct expenses have been heavily impacted by the COVID-19 pandemic. Actual expenses ran much lower than budget, however these expenses were adjusted in FY23 as the budget planned for recovery and return to in-person functions. Our projections for direct expenses are increases of 4.0% annually for FY25 and FY26, which is in line with the most current data.

ATTACHMENTS

[2] FY24 Budget and FY25-FY26 projections assuming a successful renegotiation of WSBA's lease are provided a separate memo in the Board of Governors August meeting materials.

A	**Draft FY24 General Fund Budget**
B	**Draft FY24 CLE Budget**
C	**Draft FY24 CPF Budget**
D	**Draft FY24 Sections Budgets**
E	**Request to Change Section Dues- World Peace Through Law**
F	**Draft FY24 Capital Budget**

ATTACHMENT A

Washington State Bar Association Financial Summary
FY24 Budget Draft #2

Category	FY24 Budgeted Revenues	FY24 Budgeted Expenses	FY24 Budget Net Result
Access to Justice	-	336,566	(336,566)
Admissions/Bar Exam	1,300,740	1,321,589	(20,849)
Advancement FTE	-	369,611	(369,611)
Bar News	610,100	709,301	(99,201)
Board of Governors	-	530,131	(530,131)
Character & Fitness Board	-	172,742	(172,742)
Communications Strategies	500	829,535	(829,035)
Communications Strategies FTE	-	249,977	(249,977)
Discipline	119,000	6,350,121	(6,231,121)
Diversity	135,000	438,973	(303,973)
Finance	400,000	1,141,195	(741,195)
Foundation	-	159,953	(159,953)
Human Resources	-	489,161	(489,161)
Law Clerk Program	207,200	183,802	23,398
Legislative	-	282,011	(282,011)
Legal Lunchbox	29,000	47,180	(18,180)
Licensing and Membership Records	450,900	673,317	(222,417)
Licensing Fees	17,320,499	0	17,320,499
Limited License Legal Technician	20,712	92,209	(71,497)
Limited Practice Officers	202,000	128,509	73,491
Mandatory CLE	1,113,800	890,092	223,708
Member Wellness Program	7,500	234,950	(227,450)
Member Services & Engagement	10,800	392,585	(381,785)
Mini CLE	-	111,021	(111,021)
New Member Education	67,000	99,753	(32,753)
Office of General Counsel	-	1,082,163	(1,082,163)
Office of the Executive Director	-	855,116	(855,116)
OGC-Disciplinary Board	-	316,714	(316,714)
Practice of Law Board	-	88,952	(88,952)
Practice Management Assistance	62,000	213,972	(151,972)
Professional Responsibility Program	-	239,561	(239,561)
Public Service Programs	130,000	512,784	(382,784)
Publication and Design Services	-	124,388	(124,388)
Regulatory Services FTE	-	547,608	(547,608)
Sections Administration	297,786	299,492	(1,706)
Service Center	-	737,874	(737,874)
Technology	-	2,102,928	(2,102,928)
Volunteer Engagement	-	114,406	(114,406)
Total General Fund	**22,484,537**	**23,470,242**	**(985,705)**
CLE-Seminars and Products	1,605,300	1,309,834	295,466
CLE - Deskbooks	136,500	282,566	(146,066)
Total CLE	**1,741,800**	**1,592,400**	**149,400**
Total All Sections	**597,007**	**853,982**	**(256,975)**
Client Protection Fund-Restricted	**595,930**	**689,498**	**(93,568)**
Totals	**25,419,274**	**26,606,122**	**(1,186,848)**

Washington State Bar Association
Budget Comparison

Cost Center			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
All	FY24 FTE	144.50						
	FY23 FTE	141.50						
REVENUE	40205	DIVERSION	7,500	7,500	-	0%	9,375	6,000
	40210	RECORDS REQUEST FEES	963	-	(963)	-100%	1,126	-
	40300	DONATIONS & GRANTS	265,000	265,000	-	0%	265,000	265,000
	40500	INTEREST - INVESTMENTS	39,120	474,912	435,792	1114%	152,008	690,237
	40600	LICENSE FEES	17,053,467	16,692,574	(360,893)	-2%	16,052,304	10,756,417
	40625	LICENSE FEES - NEW ADMITTEES	-	417,925	417,925		502,089	273,032
	40650	LICENSE FEES - LATE FEES	-	200,000	200,000		288,180	268,881
	40675	LICENSE FEES - REINSTATEMENTS	-	10,000	10,000		15,314	10,620
	40705	EXAM SOFTWARE REVENUE	27,000	27,500	500	2%	28,150	6,715
	40800	PUBLICATIONS REVENUE	2,000	1,500	(500)	-25%	1,923	1,029
	40900	ROYALTIES	60,800	75,300	14,500	24%	80,607	60,904
	40950	NMP PRODUCT SALES	65,000	40,000	(25,000)	-38%	39,844	18,872
	41000	SHIPPING & HANDLING	100	300	200	200%	225	99
	41100	STATUS CERTIFICATE FEES	27,000	27,000	-	0%	29,548	19,425
	41450	SPONSORSHIPS	13,000	11,000	(2,000)	-15%	12,000	9,000
	41500	ANNUAL OR OTHER MEETING REV	2,000	4,500	2,500	125%	-	-
	41700	CONFERENCES & INSTITUTES	5,000	38,000	33,000	660%	3,632	-
	41800	SEMINAR REGISTRATIONS	871,450	842,000	(29,450)	-3%	633,144	504,027
	41805	MINI-CLE REVENUE	36,430	32,090	(4,340)	-12%	32,564	11,940
	41825	SEMINAR REVENUE-OTHER	20,000	20,000	-	0%	12,000	16,270
	41850	SEMINAR SPLITS W/ CLE	(205)	(42,675)	(42,470)	20717%	101,660	-
	41875	SEMINAR SPLITS W/ OTHERS	14,300	11,000	(3,300)	-23%	33,116	-
	42207	BAR EXAM FEES	1,213,000	1,160,000	(53,000)	-4%	1,083,825	982,969
	42230	BAR EXAM LATE FEES	40,000	55,000	15,000	38%	53,700	65,400
	42232	HOUSE COUNSEL APPLICATION FEES	54,000	45,000	(9,000)	-17%	45,540	15,720
	42270	RULE 9/LEGAL INTERN FEES	12,000	12,000	-	0%	12,350	10,000
	42275	LAW CLERK FEES	185,000	204,000	19,000	10%	194,104	192,833
	42281	LLLT LICENSE FEES	16,622	18,562	1,940	12%	13,542	8,877
	42285	FOREIGN LAW CONSULTANT FEES	1,240	1,240	-	0%	1,860	1,540
	42286	LAW CLERK APPLICATION FEES	3,200	3,200	-	0%	3,700	1,600
	42287	SPECIAL ADMISSIONS	15,700	-	(15,700)	-100%	3,190	2,925
	42288	INVESTIGATION FEES	21,500	20,200	(1,300)	-6%	22,800	18,500
	42290	PRO HAC VICE	400,000	400,000	-	0%	400,282	258,770
	42291	LLLT LATE LICENSE FEES	1,100	-	(1,100)	-100%	99	133
	42450	AUDIT REVENUE	1,000	1,000	-	0%	893	701
	42570	50 YEAR MEMBER TRIBUTE LUNCH	-	500	500		480	-
	42710	BNEWS DISPLAY ADVERTISING	400,000	400,000	-	0%	331,332	264,000
	42720	BNEWS SUBSCRIPT/SINGLE ISSUES	200	100	(100)	-50%	72	36
	42730	BNEWS CLASSIFIED ADVERTISING	2,500	7,500	5,000	200%	11,083	5,779
	42760	JOB TARGET ADVERTISING	200,000	200,000	-	0%	271,814	86,079
	43100	DESKBOOK SALES (LEXISNEXIS PRINT	150,000	30,000	(120,000)	-80%	20,218	31,198
	43200	COURSEBOOK SALES	7,000	10,000	3,000	43%	1,790	770
	43400	DIGITAL VIDEO SALES	924,000	920,000	(4,000)	0%	1,234,392	710,994
	43450	SECTION PUBLICATION SALES	6,000	1,500	(4,500)	-75%	1,863	1,850
	43455	LEXIS/NEXIS ROYALTIES	35,000	75,000	40,000	114%	63,653	19,120
	43525	CASEMAKER ROYALTIES	50,000	30,000	(20,000)	-40%	28,934	15,607
	44100	WSBA LOGO MERCHANDISE SALES	2,500	-	(2,500)	-100%	2,642	342
	44350	RECOVERY OF DISCIPLINE COSTS	100,000	100,000	-	0%	85,405	30,966
	44450	DISCIPLINE HISTORY SUMMARY	18,000	18,000	-	0%	19,433	12,899
	44820	CPF RESTITUTION	40,000	10,000	(30,000)	-75%	8,906	6,063
	44840	CPF MEMBER ASSESSMENTS	690,000	525,930	(164,070)	-24%	704,366	700,830
	45040	MEMBER CONTACT INFORMATION	4,000	3,700	(300)	-8%	3,325	1,489
	45060	PHOTO BAR CARD SALES	200	200	-	0%	240	168
	45110	LPO EXAMINATION FEES	24,000	22,000	(2,000)	-8%	32,350	24,500
	45115	LPO Exam Late Fee	4,300	3,300	(1,000)	-23%	4,600	4,100
	45120	LPO LICENSE FEES	164,750	170,000	5,250	3%	170,168	108,083
	45125	LPO LATE LICENSE FEES	988	2,500	1,512	153%	2,820	2,220
	45140	LPO LICENSE FEES - REINSTATES	550	-	(550)	-100%	230	-
	45210	ACCREDITED PROGRAM FEES	550,000	550,000	-	0%	615,700	458,100
	45215	FORM 1 LATE FEE	220,000	220,000	-	0%	226,200	175,900
	45220	MEMBER LATE FEES	190,000	194,150	4,150	2%	431,050	234,950
	45230	ANNUAL ACCREDITED SPONSOR FEES	38,250	36,000	(2,250)	-6%	34,500	38,750
	45250	ATTENDANCE LATE FEES	98,000	90,000	(8,000)	-8%	119,450	87,650
	45255	COMITY CERTIFICATES - REQUEST	14,000	13,800	(200)	-1%	16,825	11,625
	45260	COMITY CERTIFICATES - SUBMIT	15,000	14,000	(1,000)	-7%	29,325	17,425
	47100	TRIAL ADVOCACY PROGRAM	12,000	12,000	-	0%	6,071	16,128
	48010	REIMBURSEMENTS FROM SECTIONS	290,543	297,786	7,243	2%	273,426	353,989
	48200	SECTION DUES REVENUE	440,225	385,680	(54,545)	-12%	416,055	564,144
		Total Revenue	**25,166,292**	**25,419,274**	**252,981**	**1%**	**25,298,410**	**18,464,187**

Direct	**50015**	DEPRECIATION	46,986	66,800	19,814	42%	-	-
	50020	BANK FEES	2,100	3,000	900	43%	2,145	1,647
	50033	CONSULTING SERVICES	179,625	164,800	(14,825)	-8%	117,214	117,807
	50037	DONATIONS/SPONSORSHIPS/GRANTS	260,828	274,997	14,169	5%	248,960	97,237
	50050	EQUIPMENT, HARDWARE & SOFTWARI	-	2,500	2,500		-	-
	50060	POSTAGE	127,550	129,002	1,452	1%	127,486	89,493
	50070	PRINTING & COPYING	253,100	252,400	(700)	0%	206,076	169,387
	50080	PUBLICATIONS PRODUCTION	200	300	100	50%	-	169
	50085	YLL SECTION PROGRAM	1,500	1,500	-	0%	550	545
	50095	CLE COMPS	1,000	1,000	-	0%	159	-
	50100	STAFF TRAVEL/PARKINC	82,678	81,321	(1,357)	-2%	56,430	28,815
	50110	STAFF CONFERENCE & TRAINING	135,965	141,404	5,439	4%	41,844	43,612
	50120	STAFF MEMBERSHIP DUES	19,000	21,718	2,718	14%	12,681	9,149
	50130	SUBSCRIPTIONS	8,687	10,025	1,338	15%	7,878	6,029
	50135	TRANSCRIPTION SERVICES	-	2,100	2,100		-	-
	50140	SUPPLIES	2,900	2,750	(150)	-5%	2,856	2,631
	50145	SURVEYS	17,050	200	(16,850)	-99%	5,331	17,512
	50155	DIGITAL/ONLINE DEVELOPMENT	1,000	2,000	1,000	100%	10,145	1,121
	50160	TELEPHONE	97,359	99,800	2,441	3%	85,020	62,443
	50165	CONFERENCE CALLS	3,925	2,435	(1,490)	-38%	1,584	615
	52110	PRO BONO & LEGAL AID COMMITTEE	1,500	2,500	1,000	67%	126	393
	52121	ATJ BOARD RETREAT	2,000	4,000	2,000	100%	396	2,130
	52125	LEADERSHIP TRAINING	42,000	44,000	2,000	5%	25,576	16,016
	52140	ATJ BOARD EXPENSE	78,400	65,000	(13,400)	-17%	13,656	43,612
	52210	FACILITY, PARKING, FOOD	110,000	100,300	(9,700)	-9%	80,879	47,732
	52215	EXAMINER FEES	36,000	34,000	(2,000)	-6%	31,500	12,500
	52221	UBE EXAMINATIONS	123,000	113,000	(10,000)	-8%	110,110	32,208
	52225	BOARD OF BAR EXAMINERS	18,850	39,000	20,150	107%	4,251	12,574
	52230	BAR EXAM PROCTORS	39,000	21,000	(18,000)	-46%	31,952	16,132
	52235	CHARACTER & FITNESS BOARD EXP	12,000	18,000	6,000	50%	123	-
	52240	DISABILITY ACCOMMODATIONS	31,000	68,967	37,967	122%	26,861	16,047
	52245	CHARACTER & FITNESS INVESTI	2,100	1,100	(1,000)	-48%	108	-
	52250	LAW SCHOOL VISITS	1,700	1,700	-	0%	354	249
	52255	LAW CLERK BOARD	8,000	8,000	-	0%	-	4,953
	52258	LAW CLERK OUTREACH	550	5,000	4,450	809%	-	-
	52270	DEPRECIATION-SOFTWARE	24,929	11,038	(13,891)	-56%	24,520	16,299
	52520	ABA DELEGATES	15,000	14,000	(1,000)	-7%	5,828	4,324
	52540	SECTION/COMMITTEE CHAIR MTGS	1,000	1,000	-	0%	-	456
	52570	APEX	47,000	50,000	3,000	6%	46,461	-
	52573	50 YEAR MEMBER TRIBUTE LUNCH	20,000	30,000	10,000	50%	30,070	128
	52585	WASHINGTON LEADERSHIP INSTITUTE	80,000	80,000	-	0%	44,764	-
	52590	BAR LEADERS CONFERENCE	12,000	-	(12,000)	-100%	-	8,497
	52660	JUD RECOMMEND COMMITTEE	2,250	2,250	-	0%	-	-
	52680	COMMITTEE FOR DIVERSITY	3,800	3,800	-	0%	1,093	953
	52681	DIVERSITY EVENTS & PROJECTS	39,250	21,800	(17,450)	-44%	9,204	3,503
	52683	LLLT BOARD	15,000	14,240	(760)	-5%	5,333	3,909
	52688	EXAM WRITING	9,000	9,000	-	0%	16,663	8,400
	52689	LLLT EDUCATION	500	-	(500)	-100%	-	-
	52710	GRAPHICS/ARTWORK	100	100	-	0%	-	-
	52810	BOG MEETINGS	205,000	185,000	(20,000)	-10%	167,735	96,246
	52820	BOG COMMITTEES' EXPENSES	3,000	2,500	(500)	-17%	233	145
	52821	BOG RETREAT	50,000	35,000	(15,000)	-30%	66	19,542
	52822	BOG CONFERENCE ATTENDANCE	43,000	60,000	17,000	40%	57,070	20,898
	52830	BOG TRAVEL & OUTREACH	14,000	22,000	8,000	57%	19,387	16,725
	52840	ED TRAVEL & OUTREACH	5,000	5,000	-	0%	1,529	1,358
	52874	PUBLIC DEFENSE	4,000	4,000	-	0%	5,225	810
	52878	COMMUNICATIONS OUTREACH	15,000	15,000	-	0%	1,298	1,245
	52880	BOG ELECTIONS	26,900	26,900	-	0%	15,900	18,400
	52940	BOARD OF TRUSTEES	750	3,250	2,500	333%	809	103
	52960	PRESIDENT'S DINNER	10,000	15,000	5,000	50%	11,570	-
	53210	COST OF SALES - DESKBOOKS	65,000	25,000	(40,000)	-62%	29,719	4,966
	53220	COST OF SALES - COURSEBOOKS	690	1,100	410	59%	141	91
	53225	COST OF SALES - SECTION PUBLIC	1,500	500	(1,000)	-67%	2,437	832
	53250	A/V DEVELOP COSTS (RECORDING)	1,250	-	(1,250)	-100%	-	-
	53255	CLE-EQUIP-DEPRECIATION	1,309	2,040	731	56%	1,312	2,233
	53265	SPLITS TO SECTIONS	300	300	-	0%	356	207
	53270	DESKBOOK ROYALTIES	300	300	-	0%	310	92
	53285	ONLINE PRODUCT HOSTING EXPENSES	53,000	53,000	-	0%	51,091	31,932
	53330	POSTAGE & DELIVRY-COURSEBOOKS	-	500	500		173	34
	53610	COURSEBOOK PRODUCTION	1,000	500	(500)	-50%	-	-
	53620	POSTAGE - FLIERS/CATALOGS	5,000	-	(5,000)	-100%	149	-
	53640	ACCREDITATION FEES	3,000	3,000	-	0%	1,788	2,712
	53660	SEMINAR BROCHURES	20,000	-	(20,000)	-100%	-	-
	53690	FACILITIES	165,200	160,500	(4,700)	-3%	71,651	53,098
	53700	SPEAKERS & PROGRAM DEVELOP	33,500	45,100	11,600	35%	13,690	13,961
	53730	HONORARIUM	1,200	4,500	3,300	275%	3,000	-
	53740	CLE SEMINAR COMMITTEE	200	200	-	0%	-	-
	54026	IMAGE LIBRARY	4,100	4,100	-	0%	4,100	4,100
	54027	BAR OUTREACH	18,000	18,000	-	0%	1,353	566
	54130	PRO BONO CERTIFICATES	2,000	2,000	-	0%	1,655	457
	54310	COURT REPORTERS	75,000	75,500	500	1%	50,285	44,078
	54320	OUTSIDE COUNSEL EXPENSES	1,500	1,000	(500)	-33%	-	-
	54360	LITIGATION EXPENSES	25,200	40,200	15,000	60%	13,404	17,625
	54370	DISABILITY EXPENSES	9,000	9,000	-	0%	3,500	198
	54400	TRANSLATION SERVICES	9,400	1,000	(8,400)	-89%	7,302	3,255
	54430	PRACTICE MONITOR EXPENSES	1,000	-	(1,000)	-100%	-	-
	54512	STAFF TRAINING- GENERAL	15,000	5,000	(10,000)	-67%	3,826	2,066

54520	RECRUITING AND ADVERTISING	6,600	8,000	1,400	21%	6,178	3,603
54530	PAYROLL PROCESSING	50,000	50,000	-	0%	50,075	32,590
54540	SALARY SURVEYS	1,500	1,500	-	0%	-	-
54590	TRANSFER TO INDIRECT EXPENSE	(77,100)	(69,200)	7,900	-10%	(75,425)	(40,108)
54610	LIBRARY MATERIALS/RESOURCES	4,000	4,000	-	0%	1,712	174
54715	MEMBER WELLNESS COUNCIL	800	1,000	200	25%	-	-
54810	GIFTS TO INJURED CLIENTS	500,000	500,000	-	0%	566,947	82,963
54820	CPF BOARD	-	2,000	2,000		390	781
54910	RENT - OLYMPIA OFFICE	-	1,500	1,500		-	-
54920	CONTRACT LOBBYIST	15,000	12,500	(2,500)	-17%	10,000	12,500
54940	LEGISLATIVE COMMITTEE	1,250	1,250	-	0%	9	-
54970	BOG LEGISLATIVE COMMITTEE	300	300	-	0%	-	-
55010	LICENSING FORMS	2,000	-	(2,000)	-100%	915	2,401
55130	LPO BOARD EXPENSES	1,792	4,000	2,208	123%	-	2,301
55165	LPO OUTREACH	1,000	1,000	-	0%	-	-
55210	MCLE BOARD EXPENSES	2,000	5,000	3,000	150%	-	-
55220	DEPRECIATION-SOFTWARE	59,565	130,449	70,884	119%	24,455	5,848
55250	CASEMAKER/FASTCASE	73,000	75,000	2,000	3%	75,064	72,966
55265	SPEAKERS & PROGRAM DEVELOPMEN	100	250	150	150%	-	-
55266	NEW LAWYER OUTREACH EVENTS	1,500	1,500	-	0%	891	250
55270	NEW LAWYERS COMMITTEE	12,000	13,500	1,500	13%	2,003	1,178
55285	OPEN SECTIONS NIGHT	3,500	-	(3,500)	-100%	-	-
55310	DISCIPLINARY BOARD EXPENSES	4,000	4,000	-	0%	1	-
55320	CHIEF HEARING OFFICER	30,000	40,000	10,000	33%	30,000	20,000
55330	HEARING OFFICER EXPENSES	17,500	4,000	(13,500)	-77%	2,763	891
55340	HEARING OFFICER TRAINING	400	400	-	0%	-	-
55370	OUTSIDE COUNSEL	60,000	48,000	(12,000)	-20%	48,000	32,000
55380	DISCIPLINARY SELECTION PANEL	-	1,000	1,000		-	-
55419	COURT RULES COMMITTEE	1,000	1,000	-	0%	0	-
55510	PRACTICE OF LAW BOARD	12,000	12,000	-	0%	-	2,220
55555	NEW EXPENSE ACCOUNT NEEDED	-	171,642	171,642		-	-
55610	CPE COMMITTEE	1,000	1,000	-	0%	-	890
55615	WILLS	2,000	2,000	-	0%	-	-
55620	CUSTODIANSHIP	8,150	5,000	(3,150)	-39%	245	199
55980	SMALL TOWN AND RURAL COMMITTE	3,000	5,000	2,000	67%	-	2,659
56100	COMPUTER HARDWARE	65,000	71,000	6,000	9%	67,315	55,120
56150	COMPUTER SOFTWARE	310,000	345,300	35,300	11%	184,289	168,302
56225	HARDWARE SERVICE & WARRANTIES	60,000	65,000	5,000	8%	49,719	44,432
56230	SOFTWARE MAINT & LICENSING	380,000	400,000	20,000	5%	375,274	297,623
56500	COMPUTER SUPPLIES	2,000	-	(2,000)	-100%	3,103	-
56550	THIRD PARTY SERVICES	40,000	20,000	(20,000)	-50%	22,446	28,227
56900	TRANSFER TO INDIRECT EXPENSES	(1,074,450)	(1,223,950)	(149,500)	14%	(852,470)	(697,293)
57320	TRIAL ADVOCACY EXPENSES	1,500	1,500	-	0%	-	-
58010	DUES STATEMENTS	5,000	-	(5,000)	-100%	4,593	-
58125	ANNUAL OR OTHER MEETING EXPENS	28,640	24,200	(4,440)	-16%	150	3,590
58150	ATTENDANCE AT BOG MEETINGS	1,960	1,550	(410)	-21%	593	-
58175	AWARDS	11,520	8,260	(3,260)	-28%	1,046	391
58200	BREAKFAST/LUNCH/DINNER MTG EXP	7,300	6,000	(1,300)	-18%	-	-
58225	CONFERENCE/INSTITUTE EXPENSE	23,145	-	(23,145)	-100%	-	18,214
58300	EXECUTIVE COMMITTEE EXPENSES	75,950	61,980	(13,970)	-18%	2,374	10,481
58305	EXECUTIVE COMM EXP - OTHER	36,550	14,000	(22,550)	-62%	23,536	9,904
58315	HONORARIUM	9,500	8,010	(1,490)	-16%	3,110	-
58325	LDSHIP/PROF DEVELOP/RETREATS	89,670	61,180	(28,490)	-32%	27,543	29,048
58326	LEGISLATIVE/LOBBYING	1,500	1,500	-	0%	-	-
58350	MEMBERSHIP & RECRUITING EXP	24,025	27,995	3,970	17%	9,928	400
58375	NEWSLETTER/PUBLICATION EXPENSE	14,560	13,550	(1,010)	-7%	3,549	3,976
58400	PER MEMBER CHARGE	272,143	246,782	(25,361)	-9%	273,426	353,989
58450	RECEPTION/FORUM EXPENSE	43,510	44,310	800	2%	7,176	15,856
58500	NEW LAWYER OUTREACH	6,800	4,320	(2,480)	-36%	1,000	316
58525	SCHOLARSHIPS/DONATIONS/GRANT	143,370	158,700	15,330	11%	72,500	48,673
58550	SECTION COMMITTEE EXPENSE	3,000	2,500	(500)	-17%	-	-
58600	SECTION SPECIAL PROJECTS	14,200	14,420	220	2%	3,500	450
58615	LAW SCHOOL OUTREACH	11,300	7,310	(3,990)	-35%	1,278	3,358
58620	MINI-CLE EXPENSE	42,959	51,870	8,911	21%	9,077	8,417
58625	SEMINAR EXPENSE - SECTIONS	63,144	96,530	33,386	53%	21,412	3,981
58675	WEBSITE EXPENSES	8,420	5,880	(2,540)	-30%	3,248	3,297
58750	SEMINAR SCHOLARSHIPS	6,000	8,000	2,000	33%	1,950	2,000
				-			
	Total Direct Expenses	**4,432,754**	**4,435,125**	**2,371**	**0%**	**3,043,141**	**1,906,258**

Indirect	**51110**	SALARIES	13,113,765	13,746,746	632,981	5%	11,940,870	8,363,533
	51120	BUDGETED TEMPORARY EMPLOYEES	200,627	142,512	(58,115)	-29%	143,280	151,190
	51121	UNANTICIPATED TEMPS	-	-	-		31,013	1,364
	51210	EMPLOYEE ASSISTANCE PLAN	4,800	4,800	0	0%	4,800	4,000
	51220	EMPLOYEE SERVICE AWARDS	2,038	1,680	(358)	-18%	1,655	1,370
	51230	FICA (EMPLOYER PORTION)	806,675	1,016,194	209,519	26%	915,303	610,208
	51240	L&I INSURANCE	62,000	71,948	9,948	16%	65,681	28,804
	51245	WA STATE FAMILY MEDICAL LEAVE (I	18,000	29,358	11,358	63%	18,724	16,160
	51250	MEDICAL (EMPLOYER PORTION)	1,701,951	1,741,697	39,746	2%	1,652,191	1,091,590
	51270	RETIREMENT (EMPLOYER PORTION)	1,356,286	1,273,978	(82,309)	-6%	1,203,504	859,100
	51280	TRANSPORTATION ALLOWANCE	65,045	34,000	(31,045)	-48%	51,168	32,443
	51290	UNEMPLOYMENT INSURANCE	65,206	81,513	16,307	25%	74,734	50,136
	51310	WORKPLACE BENEFITS	45,980	52,710	6,730	15%	33,394	18,315
	51340	HUMAN RESOURCES POOLED EXP	77,100	69,200	(7,900)	-10%	75,425	40,108
	51405	MEETING SUPPORT EXPENSES	10,000	7,500	(2,500)	-25%	5,182	4,015
	51410	RENT	2,131,247	2,065,775	(65,472)	-3%	2,031,801	228,209
	51420	PERSONAL PROP TAXES-WSBA	6,650	6,650	0	0%	5,832	3,628
	51430	FURNITURE, MAINT, LH IMP	25,300	45,000	19,700	78%	19,729	6,119
	51440	OFFICE SUPPLIES & EQUIP	18,000	21,500	3,500	19%	19,752	12,744
	51450	FURN & OFFICE EQUIP DEPREC	96,357	111,192	14,835	15%	53,757	40,301
	51460	FURN & OFFICE EQUIP DEPREC-NEW	-	-	-		-	-
	51470	COMPUTER HARDWARE DEPREC	45,354	49,926	4,572	10%	36,255	27,300
	51480	COMPUTER SOFTWARE DEPREC	99,251	56,569	(42,682)	-43%	99,934	35,807
	51500	INSURANCE	272,643	295,000	22,357	8%	254,713	176,202
	51501	WORK HOME FURNITURE & EQUIP	14,000	14,000	0	0%	43,021	3,280
	51505	PROFESSIONAL FEES-AUDIT	50,000	35,000	(15,000)	-30%	30,000	30,365
	51510	PROFESSIONAL FEES- LEGAL	200,000	200,000	0	0%	135,866	47,099
	51512	ONLINE LEGAL RESEARCH	50,000	24,359	(25,641)	-51%	-	27,797
	51513	ACCOMODATIONS FUND	-	6,500	6,500			
	51514	TRANSLATION SERVICES	-	12,000	12,000			
	51515	TELEPHONE & INTERNET	33,600	33,000	(600)	-2%	14,437	13,625
	51520	POSTAGE - GENERAL	24,000	18,300	(5,700)	-24%	17,215	9,069
	51525	RECORDS STORAGE	30,000	30,000	0	0%	27,648	18,045
	51526	STAFF TRAINING	-	-	-		-	-
	51530	BANK FEES (INDIRECT)	51,000	50,000	(1,000)	-2%	46,531	35,317
	51620	PRODUCTION MAINT & SUPPLIES	15,340	12,500	(2,840)	-19%	10,650	3,993
	51710	COMPUTER POOLED EXPENSES	1,074,450	1,223,950	149,500	14%	852,470	697,293
	51925	ALLOWANCE FOR OPEN POSITIONS	(200,000)	(200,000)	-	0%	-	-
	51955	CAPITAL LABOR & OVERHEAD	(280,000)	(210,000)	70,000	-25%	(267,632)	(185,558)
	55555	NEW EXPENSE ACCOUNT NEEDED		(4,060)				
		TOTAL INDIRECT EXPENSES:	**21,286,666**	**22,170,997**	**888,392**	**4%**	**19,648,904**	**12,502,970**
		TOTAL ALL EXPENSES:	**25,719,419**	**26,606,122**	**890,763**	**3%**	**22,692,045**	**14,409,229**
		NET INCOME (LOSS):	**(553,127)**	**(1,186,848)**	**(637,781)**	**115%**	**2,606,365**	**4,054,958**

INDIRECT EXPENSES

Cost Center **FY24 FTE 144.50**
All **FY23 FTE 141.05**

Washington State Bar Association
Budget Comparison

			2023 Budget	2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
INDIRECT	**51110**	SALARIES	13,113,765	13,746,746	632,981	5%	11,940,870	8,363,533
	51120	BUDGETED TEMPORARY EMPLOYEES	200,627	142,512	(58,115)	-29%	143,280	151,190
	51121	UNANTICIPATED TEMPS	-	-	-		31,013	1,364
	51925	ALLOWANCE FOR OPEN POSITIONS	(200,000)	(200,000)	-	0%	-	-
	55555	INSURANCE REBATE		(4,060)	(4,060)		-	-
	51955	CAPITAL LABOR & OVERHEAD	(280,000)	(210,000)	70,000	-25%	(267,632)	(185,558)
	51199	**SALARY EXPENSE**	**12,834,392**	**13,475,198**	**640,806**	**5%**	**11,847,531**	**8,330,529**
	51210	EMPLOYEE ASSISTANCE PLAN	4,800	4,800	0	0%	4,800	4,000
	51220	EMPLOYEE SERVICE AWARDS	2,038	1,680	(358)	-18%	1,655	1,370
	51230	FICA (EMPLOYER PORTION)	806,675	1,016,194	209,519	26%	915,303	610,208
	51240	L&I INSURANCE	62,000	71,948	9,948	16%	65,681	28,804
	51245	WA STATE FAMILY MEDICAL LEAVE (ER PORTION)	18,000	29,358	11,358	63%	18,724	16,160
	51250	MEDICAL (EMPLOYER PORTION)	1,701,951	1,741,697	39,746	2%	1,652,191	1,091,590
	51270	RETIREMENT (EMPLOYER PORTION)	1,356,286	1,273,978	(82,309)	-6%	1,203,504	859,100
	51280	TRANSPORTATION ALLOWANCE	65,045	34,000	(31,045)	-48%	51,168	32,443
	51290	UNEMPLOYMENT INSURANCE	65,206	81,513	16,307	25%	74,734	50,136
	51299	**BENEFITS EXPENSE**	**4,082,002**	**4,255,169**	**173,167**	**4%**	**3,987,760**	**2,693,810**
	51310	WORKPLACE BENEFITS	45,980	52,710	6,730	15%	33,394	18,315
	51340	HUMAN RESOURCES POOLED EXP	77,100	69,200	(7,900)	-10%	75,425	40,108
	51405	MEETING SUPPORT EXPENSES	10,000	7,500	(2,500)	-25%	5,182	4,015
	51410	RENT	2,131,247	2,065,775	(65,472)	-3%	2,031,801	228,209
	51420	PERSONAL PROP TAXES-WSBA	6,650	6,650	0	0%	5,832	3,628
	51430	FURNITURE, MAINT, LH IMP	25,300	45,000	19,700	78%	19,729	6,119
	51440	OFFICE SUPPLIES & EQUIP	18,000	21,500	3,500	19%	19,752	12,744
	51450	FURN & OFFICE EQUIP DEPREC	96,357	111,192	14,835	15%	53,757	40,301
	51470	COMPUTER HARDWARE DEPREC	45,354	49,926	4,572	10%	36,255	27,300
	51480	COMPUTER SOFTWARE DEPREC	99,251	56,569	(42,682)	-43%	99,934	35,807
	51500	INSURANCE	272,643	295,000	22,357	8%	254,713	176,202
	51501	WORK HOME FURNITURE & EQUIP	14,000	14,000	0	0%	43,021	3,280
	51505	PROFESSIONAL FEES-AUDIT	50,000	35,000	(15,000)	-30%	30,000	30,365
	51510	PROFESSIONAL FEES- LEGAL	200,000	200,000	0	0%	135,866	47,099
	51512	ONLINE LEGAL RESEARCH	50,000	24,359	(25,641)	-51%	-	27,797
	51513	ACCOMODATIONS FUND	-	6,500	6,500			
	51514	TRANSLATION SERVICES	-	12,000	12,000			
	51515	TELEPHONE & INTERNET	33,600	33,000	(600)	-2%	14,437	13,625
	51520	POSTAGE - GENERAL	24,000	18,300	(5,700)	-24%	17,215	9,069
	51525	RECORDS STORAGE	30,000	30,000	0	0%	27,648	18,045
	51526	STAFF TRAINING	-	-	-		-	-
	51530	BANK FEES (INDIRECT)	51,000	50,000	(1,000)	-2%	46,531	35,317
	51620	PRODUCTION MAINT & SUPPLIES	15,340	12,500	(2,840)	-19%	10,650	3,993
	51710	COMPUTER POOLED EXPENSES	1,074,450	1,223,950	149,500	14%	852,470	697,293
	51900	**OTHER INDIRECT EXPENSE**	**4,370,272**	**4,440,631**	**70,359**	**2%**	**3,813,613**	**1,478,631**
		TOTAL INDIRECT EXPENSES:	**21,286,666**	**22,170,997**	**884,332**	**4%**	**19,648,904**	**12,502,970**

Washington State Bar Association
Budget Comparison

ACCESS TO JUSTICE

Cost Center **FY24 FTE 1.64**
ATJ **FY23 FTE 1.64**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:	**50100**	STAFF TRAVEL/PARKING	3,000	2,800	(200)	-7%	258	1,119
	50110	STAFF CONFERENCE & TRAINING	1,675	1,742	67	4%	350	375
	50145	SURVEYS	100	100	-	0%	-	331
	52121	ATJ BOARD RETREAT	2,000	4,000	2,000	100%	396	2,130
	52125	LEADERSHIP TRAINING	2,000	4,000	2,000	100%	2,000	2,175
	52140	ATJ BOARD EXPENSE	78,400	65,000	(13,400)	-17%	13,656	43,612
	52874	PUBLIC DEFENSE	4,000	4,000	-	0%	5,225	810
	58225	CONFERENCE/INSTITUTE EXPENSE	23,145	-	(23,145)	-100%	-	18,214
	58450	RECEPTION/FORUM EXPENSE	7,500	11,000	3,500	47%	-	748
	TOTAL DIRECT EXPENSES		**121,820**	**92,642**	**(29,178)**	**-24%**	**21,885**	**69,514**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	138,139	145,500	7,361	5%	91,005	93,334
	51299	BENEFITS EXPENSE	48,192	47,674	(518)	-1%	33,679	30,970
	51900	OTHER INDIRECT EXPENSE	50,751	50,750	(1)	0%	35,177	31,248
	TOTAL INDIRECT EXPENSES:		**237,082**	**243,924**	**6,843**	**3%**	**159,861**	**155,552**
	TOTAL ALL EXPENSES:		**358,902**	**336,566**	**(22,335)**	**-6%**	**181,745**	**225,067**
	NET INCOME (LOSS):		**(358,902)**	**(336,566)**	**22,335**	**-6%**	**(181,745)**	**(225,067)**

Washington State Bar Association
Budget Comparison

ADMISSIONS
Cost Center **FY24 FTE** **6.75**
ADMISS **FY23 FTE** **6.75**

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**40705**	EXAM SOFTWARE REVENUE	27,000	27,500	500	2%	28,150	6,715
	42207	BAR EXAM FEES	1,213,000	1,160,000	(53,000)	-4%	1,083,825	982,969
	42230	BAR EXAM LATE FEES	40,000	55,000	15,000	38%	53,700	65,400
	42232	HOUSE COUNSEL APPLICATION FEES	54,000	45,000	(9,000)	-17%	45,540	15,720
	42270	RULE 9/LEGAL INTERN FEES	12,000	12,000	-	0%	12,350	10,000
	42285	FOREIGN LAW CONSULTANT FEES	1,240	1,240	-	0%	1,860	1,540
	42287	SPECIAL ADMISSIONS	15,700	-	(15,700)	-100%	3,190	2,925
	TOTAL REVENUE		**1,362,940**	**1,300,740**	**(62,200)**	**-5%**	**1,228,615**	**1,085,269**
DIRECT EXPENSES:	**50060**	POSTAGE	750	1,000	250	33%	-	493
	50100	STAFF TRAVEL/PARKING	23,000	20,000	(3,000)	-13%	23,795	9,105
	50110	STAFF CONFERENCE & TRAINING	10,500	10,920	420	4%	6,729	1,644
	50120	STAFF MEMBERSHIP DUES	600	400	(200)	-33%	250	150
	50140	SUPPLIES	2,750	1,500	(1,250)	-45%	2,710	784
	52210	FACILITY, PARKING, FOOD	101,000	94,000	(7,000)	-7%	76,311	45,564
	52215	EXAMINER FEES	36,000	34,000	(2,000)	-6%	31,500	12,500
	52221	UBE EXAMINATIONS	123,000	113,000	(10,000)	-8%	110,110	32,208
	52225	BOARD OF BAR EXAMINERS	18,850	39,000	20,150	107%	4,251	12,574
	52230	BAR EXAM PROCTORS	39,000	21,000	(18,000)	-46%	31,952	16,132
	52240	DISABILITY ACCOMMODATIONS	27,000	55,967	28,967	107%	26,406	15,988
	52245	CHARACTER & FITNESS INVESTI	2,000	1,000	(1,000)	-50%	108	-
	54380	ONLINE LEGAL RESEARCH	-	-	-		3,817	-
	52250	LAW SCHOOL VISITS	1,700	1,700	-	0%	354	249
	54390	LAW LIBRARY	-	-	-		138	-
	52270	DEPRECIATION-SOFTWARE	24,929	11,038	(13,891)	-56%	24,520	16,299
	TOTAL DIRECT EXPENSES		**411,079**	**404,525**	**(6,554)**	**-2%**	**342,952**	**163,690**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	512,745	522,057	9,312	2%	535,723	328,874
	51299	BENEFITS EXPENSE	171,146	186,127	14,981	9%	174,798	128,290
	51900	OTHER INDIRECT EXPENSE	208,882	208,880	(2)	0%	186,135	128,407
	TOTAL INDIRECT EXPENSES:		**892,773**	**917,064**	**24,291**	**3%**	**896,656**	**585,570**
	TOTAL ALL EXPENSES:		**1,303,852**	**1,321,589**	**17,737**	**1%**	**1,239,607**	**749,260**
	NET INCOME (LOSS):		**59,088**	**(20,849)**	**(79,937)**	**-135%**	**(10,992)**	**336,009**

Washington State Bar Association
Budget Comparison

ADVANCEMENT FTE

Cost Center	**FY24 FTE**	**1.89**
ADV FTE	**FY23 FTE**	**1.88**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:	**50110**	STAFF CONFERENCE & TRAINING	8,100	8,424	324	4%	2,924	2,414
	TOTAL DIRECT EXPENSES		**8,100**	**8,424**	**324**	**4%**	**2,924**	**2,414**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	233,777	244,054	10,277	4%	223,017	156,245
	51299	BENEFITS EXPENSE	62,511	58,647	(3,864)	-6%	66,651	40,782
	51900	OTHER INDIRECT EXPENSE	58,178	58,486	309	1%	51,127	35,641
	TOTAL INDIRECT EXPENSES:		**354,465**	**361,187**	**6,722**	**2%**	**340,795**	**232,668**
	TOTAL ALL EXPENSES:		**362,565**	**369,611**	**7,046**	**2%**	**343,719**	**235,082**
	NET INCOME (LOSS):		**(362,565)**	**(369,611)**	**(7,046)**	**2%**	**(343,719)**	**(235,082)**

Washington State Bar Association
Budget Comparison

BAR NEWS
Cost Center **FY24 FTE 2.23**
BN **FY23 FTE 2.23**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**40900**	ROYALTIES	-	2,500	2,500		5,310	-
	42710	BNEWS DISPLAY ADVERTISING	400,000	400,000	-	0%	331,332	264,000
	42720	BNEWS SUBSCRIPT/SINGLE ISSUES	200	100	(100)	-50%	72	36
	42730	BNEWS CLASSIFIED ADVERTISING	2,500	7,500	5,000	200%	11,083	5,779
	42740	GEN ANNOUNCEMENTS	-	-	-		17,344	-
	42750	PROF ANNOUNCEMENTS	-	-	-		24,086	-
	42760	JOB TARGET ADVERSTISING	200,000	200,000	-	0%	271,814	86,079
	TOTAL REVENUE		**602,700**	**610,100**	**7,400**	**1%**	**661,041**	**355,894**
DIRECT EXPENSES:	**50060**	POSTAGE	110,000	110,000	-	0%	103,134	70,932
	50070	PRINTING & COPYING	250,000	250,000	-	0%	205,953	168,088
	50110	STAFF CONFERENCE & TRAINING	2,000	2,080	80	4%	997	-
	50120	STAFF MEMBERSHIP DUES	135	135	-	0%	-	-
	50130	SUBSCRIPTIONS	225	225	-	0%	90	(347)
	52730	OUTSIDE SALES EXPENSE	-	-	-		1,730	-
	50155	DIGITAL/ONLINE DEVELOPMENT	1,000	2,000	1,000	100%	9,815	1,121
	52710	GRAPHICS/ARTWORK	100	100	-	0%	-	-
	TOTAL DIRECT EXPENSES		**363,460**	**364,540**	**1,080**	**0%**	**321,719**	**239,794**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	209,396	213,007	3,611	2%	203,354	140,515
	51299	BENEFITS EXPENSE	54,103	62,746	8,643	16%	56,755	35,157
	51900	OTHER INDIRECT EXPENSE	69,008	69,008	(1)	0%	74,539	42,444
	TOTAL INDIRECT EXPENSES:		**332,507**	**344,761**	**12,253**	**4%**	**334,648**	**218,116**
	TOTAL ALL EXPENSES:		**695,967**	**709,301**	**13,333**	**2%**	**656,367**	**457,910**
	NET INCOME (LOSS):		**(93,267)**	**(99,201)**	**(5,933)**	**6%**	**4,674**	**(102,016)**

Washington State Bar Association
Budget Comparison

BOARD OF GOVERNORS

Cost Center **FY24 FTE 1.20**
BOG **FY23 FTE 1.40**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
DIRECT EXPENSES:	**50033**	CONSULTING SERVICES	-	-	-		7,264	6,143
	50140	SUPPLIES	-	500	500		-	-
	52125	LEADERSHIP TRAINING	20,000	20,000	-	0%	23,576	7,681
	52810	BOG MEETINGS	205,000	185,000	(20,000)	-10%	167,735	96,246
	52820	BOG COMMITTEES' EXPENSES	3,000	2,500	(500)	-17%	233	145
	52821	BOG RETREAT	50,000	35,000	(15,000)	-30%	66	19,542
	52822	BOG CONFERENCE ATTENDANCE	43,000	60,000	17,000	40%	57,070	20,898
	52830	BOG TRAVEL & OUTREACH	14,000	22,000	8,000	57%	19,387	16,725
	52880	BOG ELECTIONS	26,900	26,900	-	0%	15,900	18,400
	52960	PRESIDENT'S DINNER	10,000	15,000	5,000	50%	11,570	-
	52910	MEMBER OUTREACH/ETHOS MEETINGS	-	-	-		18,786	-
	55555	NEW GOVERNOR ORIENTATION		10,000	10,000		-	-
	55555	PRESIDENTS PHOTO		3,300	3,300		-	-
	55555	LONG RANGE STRATEGIC PLANNING COUNCIL	-	600	600		-	-
	TOTAL DIRECT EXPENSES		**371,900**	**380,800**	**8,900**	**2%**	**321,588**	**185,779**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	112,271	88,800	(23,471)	-21%	104,367	80,392
	51299	BENEFITS EXPENSE	36,105	23,396	(12,709)	-35%	33,720	23,004
	51900	OTHER INDIRECT EXPENSE	43,324	37,134	(6,190)	-14%	37,837	26,595
	TOTAL INDIRECT EXPENSES:		**191,700**	**149,331**	**(42,369)**	**-22%**	**175,924**	**129,990**
	TOTAL ALL EXPENSES:		**563,600**	**530,131**	**(33,469)**	**-6%**	**497,512**	**315,770**
	NET INCOME (LOSS):		**(563,600)**	**(530,131)**	**33,469**	**-6%**	**(497,512)**	**(315,770)**

Washington State Bar Association
Budget Comparison

CHARACTER & FITNESS BOARD

Cost Center **FY24 FTE** **0.75**
CFB **FY23 FTE** **0.75**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-	-	-	-
DIRECT EXPENSES:	**52235**	CHARACTER & FITNESS BOARD EXP	12,000	18,000	6,000	50%	123	-
	54310	COURT REPORTERS	15,000	15,000	-	0%	3,256	869
	TOTAL DIRECT EXPENSES		**27,000**	**33,000**	**6,000**	**22%**	**3,379**	**869**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	90,551	93,739	3,189	4%	14,315	60,341
	51299	BENEFITS EXPENSE	25,863	22,794	(3,069)	-12%	2,796	16,441
	51900	OTHER INDIRECT EXPENSE	23,209	23,209	(0)	0%	1,513	14,437
	TOTAL INDIRECT EXPENSES:		**139,623**	**139,742**	**119**	**0%**	**18,624**	**91,219**
	TOTAL ALL EXPENSES:		**166,623**	**172,742**	**6,119**	**4%**	**22,004**	**92,088**
	NET INCOME (LOSS):		**(166,623)**	**(172,742)**	**(6,119)**	**4%**	**(22,004)**	**(92,088)**

Washington State Bar Association
Budget Comparison

COMMUNICATION STRATEGIES

Cost Center **FY24 FTE** **5.20**
COMM **FY23 FTE** **5.20**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**41450**	SPONSORSHIPS	1,000	-	(1,000)	-100%	1,000	-
	42570	50 YEAR MEMBER TRIBUTE LUNCH	-	500	500		480	-
	44100	WSBA LOGO MERCHANDISE SALES	2,500	-	(2,500)	-100%	2,642	342
	TOTAL REVENUE		**3,500**	**500**	**(3,000)**	**-86%**	**4,122**	**342**
DIRECT EXPENSES:	**50050**	EQUIPMENT, HARDWARE & SOFTWARE	-	2,500	2,500		-	-
	50100	STAFF TRAVEL/PARKING	3,395	5,895	2,500	74%	4,003	1,782
	50110	STAFF CONFERENCE & TRAINING	7,500	7,800	300	4%	2,358	1,817
	50120	STAFF MEMBERSHIP DUES	1,120	1,120	-	0%	740	714
	50130	SUBSCRIPTIONS	4,000	4,000	-	0%	3,468	1,723
	52570	APEX	47,000	50,000	3,000	6%	46,461	-
	52573	50 YEAR MEMBER TRIBUTE LUNCH	20,000	30,000	10,000	50%	30,070	128
	52878	COMMUNICATIONS OUTREACH	15,000	15,000	-	0%	1,298	1,245
	54027	BAR OUTREACH	18,000	18,000	-	0%	1,353	566
	TOTAL DIRECT EXPENSES		**116,015**	**134,315**	**18,300**	**16%**	**90,837**	**7,974**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	387,612	398,702	11,090	3%	354,285	259,209
	51299	BENEFITS EXPENSE	126,285	135,604	9,318	7%	128,514	82,495
	51900	OTHER INDIRECT EXPENSE	160,917	160,915	(2)	0%	139,241	99,126
	TOTAL INDIRECT EXPENSES:		**674,814**	**695,220**	**20,406**	**3%**	**622,039**	**440,830**
	TOTAL ALL EXPENSES:		**790,829**	**829,535**	**38,706**	**5%**	**712,876**	**448,804**
	NET INCOME (LOSS):		**(787,329)**	**(829,035)**	**(41,706)**	**5%**	**(708,755)**	**(448,462)**

Washington State Bar Association
Budget Comparison

COMMUNICATION STRATEGIES FTE

Cost Center **FY24 FTE 1.00**
COMM FTE **FY23 FTE 1.00**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	168,213	171,146	2,933	2%	154,665	113,078
	51299	BENEFITS EXPENSE	44,241	47,886	3,645	8%	41,050	28,623
	51900	OTHER INDIRECT EXPENSE	30,946	30,945	(1)	0%	26,865	19,073
	TOTAL INDIRECT EXPENSES:		**243,400**	**249,977**	**6,577**	**3%**	**222,579**	**160,773**
	NET INCOME (LOSS):		**(243,400)**	**(249,977)**	**(6,577)**	**3%**	**(222,579)**	**(160,773)**

Washington State Bar Association
Budget Comparison

DISCIPLINE
Cost Center **FY24 FTE 38.00**
DISC **FY23 FTE 38.00**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**42450**	AUDIT REVENUE	1,000	1,000	-	0%	893	701
	40200	COPY FEES	-	-	-		36	-
	44350	RECOVERY OF DISCIPLINE COSTS	100,000	100,000	-	0%	85,405	30,966
	44450	DISCIPLINE HISTORY SUMMARY	18,000	18,000	-	0%	19,433	12,899
	TOTAL REVENUE		**119,000**	**119,000**	**-**	**0%**	**105,767**	**44,566**
DIRECT EXPENSES:	**50015**	DEPRECIATION	45,835	62,125	16,290	36%	-	-
	50080	PUBLICATIONS PRODUCTION	200	300	100	50%	-	169
	50100	STAFF TRAVEL/PARKING	20,000	15,000	(5,000)	-25%	13,222	5,077
	50110	STAFF CONFERENCE & TRAINING	33,295	34,627	1,332	4%	19,171	15,197
	50120	STAFF MEMBERSHIP DUES	7,610	7,365	(245)	-3%	6,100	1,920
	50160	TELEPHONE	2,359	4,800	2,441	103%	2,721	2,426
	54310	COURT REPORTERS	60,000	60,000	-	0%	46,457	43,209
	54320	OUTSIDE COUNSEL EXPENSES	1,500	1,000	(500)	-33%	-	-
	54360	LITIGATION EXPENSES	25,000	40,000	15,000	60%	13,258	17,625
	54370	DISABILITY EXPENSES	9,000	9,000	-	0%	3,500	198
	54400	TRANSLATION SERVICES	1,200	1,000	(200)	-17%	512	150
	54430	PRACTICE MONITOR EXPENSES	1,000	-	(1,000)	-100%	-	-
	54380	ONLINE LEGAL RESEARCH	-	-	-		55,493	-
	54390	LAW LIBRARY	-	-	-		5,453	(0)
	TOTAL DIRECT EXPENSES		**206,999**	**235,217**	**28,218**	**14%**	**165,886**	**85,970**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	3,764,781	3,789,505	24,724	1%	3,496,048	2,307,833
	51299	BENEFITS EXPENSE	1,073,208	1,149,483	76,275	7%	1,090,771	708,983
	51900	OTHER INDIRECT EXPENSE	1,169,740	1,175,916	6,176	1%	990,943	719,668
	TOTAL INDIRECT EXPENSES:		**6,007,729**	**6,114,904**	**107,175**	**2%**	**5,577,763**	**3,736,484**
	TOTAL ALL EXPENSES:		**6,214,728**	**6,350,121**	**135,393**	**2%**	**5,743,648**	**3,822,454**
	NET INCOME (LOSS):		**(6,095,728)**	**(6,231,121)**	**(135,393)**	**2%**	**(5,637,881)**	**(3,777,889)**

Washington State Bar Association
Budget Comparison

DIVERSITY
Cost Center **FY24 FTE 2.69**
DIV **FY23 FTE 1.69**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**40300**	DONATIONS & GRANTS	135,000	135,000	-	0%	135,000	135,000
	TOTAL REVENUE		**135,000**	**135,000**	**-**	**0%**	**135,000**	**135,000**
DIRECT EXPENSES:	**50033**	CONSULTING SERVICES	54,625	45,000	(9,625)	-18%	25,722	13,575
	50100	STAFF TRAVEL/PARKING	2,000	1,500	(500)	-25%	541	774
	50110	STAFF CONFERENCE & TRAINING	5,000	5,200	200	4%	1,663	600
	50120	STAFF MEMBERSHIP DUES	360	550	190	53%	45	90
	50145	SURVEYS	16,500	-	(16,500)	-100%	5,000	16,500
	52680	COMMITTEE FOR DIVERSITY	3,800	3,800	-	0%	1,093	953
	52681	DIVERSITY EVENTS & PROJECTS	39,250	21,800	(17,450)	-44%	9,204	3,503
	TOTAL DIRECT EXPENSES		**121,535**	**77,850**	**(43,685)**	**-36%**	**43,328**	**35,995**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	144,941	212,559	67,618	47%	155,618	69,303
	51299	BENEFITS EXPENSE	43,533	65,321	21,788	50%	52,631	33,065
	51900	OTHER INDIRECT EXPENSE	52,260	83,242	30,983	59%	64,701	39,229
	TOTAL INDIRECT EXPENSES:		**240,734**	**361,123**	**120,389**	**50%**	**272,950**	**141,597**
	TOTAL ALL EXPENSES:		**362,269**	**438,973**	**76,704**	**21%**	**316,278**	**177,592**
	NET INCOME (LOSS):		**(227,269)**	**(303,973)**	**(76,704)**	**34%**	**(181,278)**	**(42,592)**

Washington State Bar Association
Budget Comparison

FINANCE
Cost Center **FY24 FTE 6.92**
FIN **FY23 FTE 6.92**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**40500**	INTEREST - INVESTMENTS	26,000	400,000	374,000	1438%	105,118	536,242
	TOTAL REVENUE		**26,000**	**400,000**	**374,000**	**1438%**	**105,118**	**536,242**
DIRECT EXPENSES:	**50033**	CONSULTING SERVICES	10,000	-	(10,000)	-100%	-	875
	50100	STAFF TRAVEL/PARKING	3,000	1,500	(1,500)	-50%	460	2,140
	50110	STAFF CONFERENCE & TRAINING	500	520	20	4%	-	-
	50120	STAFF MEMBERSHIP DUES	-	620	620		-	685
	TOTAL DIRECT EXPENSES		**13,500**	**2,640**	**(10,860)**	**-80%**	**460**	**3,700**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	661,642	712,444	50,802	8%	655,639	446,251
	51299	BENEFITS EXPENSE	205,235	211,971	6,737	3%	194,403	134,509
	51900	OTHER INDIRECT EXPENSE	213,844	214,141	297	0%	186,525	132,167
	TOTAL INDIRECT EXPENSES:		**1,080,720**	**1,138,555**	**57,835**	**5%**	**1,036,567**	**712,928**
	TOTAL ALL EXPENSES:		**1,094,220**	**1,141,195**	**46,975**	**4%**	**1,037,027**	**716,628**
	NET INCOME (LOSS):		**(1,068,220)**	**(741,195)**	**327,025**	**-31%**	**(931,909)**	**(180,385)**

Washington State Bar Association
Budget Comparison

FOUNDATION
Cost Center **FY24 FTE 1.05**
FOUND **FY23 FTE 1.05**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
DIRECT EXPENSES:	**50033**	CONSULTING SERVICES	3,000	3,000	-	0%	3,000	3,000
	50060	POSTAGE	300	350	50	17%	-	8
	50070	PRINTING & COPYING	450	700	250	56%	-	-
	50100	STAFF TRAVEL/PARKING	700	900	200	29%	337	-
	50110	STAFF CONFERENCE & TRAINING	300	312	12	4%	-	-
	50140	SUPPLIES	150	150	-	0%	75	24
	52940	BOARD OF TRUSTEES	750	3,250	2,500	333%	809	103
	TOTAL DIRECT EXPENSES		**5,650**	**8,662**	**3,012**	**53%**	**4,221**	**3,134**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	96,359	100,026	3,667	4%	81,103	63,848
	51299	BENEFITS EXPENSE	18,295	18,773	477	3%	15,473	11,523
	51900	OTHER INDIRECT EXPENSE	32,493	32,492	(0)	0%	26,864	19,879
	TOTAL INDIRECT EXPENSES:		**147,147**	**151,291**	**4,144**	**3%**	**123,441**	**95,250**
	TOTAL ALL EXPENSES:		**152,797**	**159,953**	**7,156**	**5%**	**127,662**	**98,384**
	NET INCOME (LOSS):		**(152,797)**	**(159,953)**	**(7,156)**	**5%**	**(127,662)**	**(98,384)**

Washington State Bar Association
Budget Comparison

HUMAN RESOURCES

Cost Center **FY24 FTE 4.00**
HR **FY23 FTE 4.00**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
DIRECT EXPENSES:	**50033**	CONSULTING SERVICES	2,000	2,000	-	0%	14,285	-
	50100	STAFF TRAVEL/PARKING	700	700	-	0%	419	43
	50120	STAFF MEMBERSHIP DUES	800	1,000	200	25%	219	458
	50130	SUBSCRIPTIONS	500	1,000	500	100%	423	1,348
	54512	STAFF TRAINING- GENERAL	15,000	5,000	(10,000)	-67%	3,826	2,066
	54520	RECRUITING AND ADVERTISING	6,600	8,000	1,400	21%	6,178	3,603
	54530	PAYROLL PROCESSING	50,000	50,000	-	0%	50,075	32,590
	54540	SALARY SURVEYS	1,500	1,500	-	0%	-	-
	54590	TRANSFER TO INDIRECT EXPENSE	(77,100)	(69,200)	7,900	-10%	(75,425)	(40,108)
	TOTAL DIRECT EXPENSES		**-**	**-**	**-**		**0**	**-**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	380,554	468,418	87,864	23%	295,990	257,342
	51299	BENEFITS EXPENSE	120,251	96,963	(23,288)	-19%	104,383	73,455
	51925	ALLOWANCE FOR OPEN POSITIONS	(200,000)	(200,000)	-	0%	-	-
	51900	OTHER INDIRECT EXPENSE	123,820	123,781	(40)	0%	80,971	69,298
	TOTAL INDIRECT EXPENSES:		**424,625**	**489,161**	**64,536**	**15%**	**481,345**	**400,096**
	TOTAL ALL EXPENSES:		**424,625**	**489,161**	**64,536**	**15%**	**481,345**	**400,096**
	NET INCOME (LOSS):		**(424,625)**	**(489,161)**	**(64,536)**	**15%**	**(481,345)**	**(400,096)**

Washington State Bar Association
Budget Comparison

LAW CLERK PROGRAM

Cost Center **FY24 FTE 1.23**
CLERK **FY23 FTE 1.23**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**42275**	LAW CLERK FEES	185,000	204,000	19,000	10%	194,104	192,833
	42286	LAW CLERK APPLICATION FEES	3,200	3,200	-	0%	3,700	1,600
	TOTAL REVENUE		**188,200**	**207,200**	**19,000**	**10%**	**197,804**	**194,433**
DIRECT EXPENSES:	**50015**	DEPRECIATION	-	4,675	4,675		-	-
	50100	STAFF TRAVEL/PARKING	-	500	500		-	-
	50130	SUBSCRIPTIONS	250	250	-	0%	250	-
	52245	CHARACTER & FITNESS INVESTI	100	100	-	0%	-	-
	52255	LAW CLERK BOARD	8,000	8,000	-	0%	-	4,953
	52258	LAW CLERK OUTREACH	550	5,000	4,450	809%	-	-
	TOTAL DIRECT EXPENSES		**8,900**	**18,525**	**9,625**	**108%**	**250**	**4,953**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	82,442	100,677	18,235	22%	72,744	54,457
	51299	BENEFITS EXPENSE	25,330	26,538	1,207	5%	21,617	16,013
	51900	OTHER INDIRECT EXPENSE	30,327	38,063	7,736	26%	24,972	18,536
	TOTAL INDIRECT EXPENSES:		**138,099**	**165,277**	**27,178**	**20%**	**119,334**	**89,006**
	TOTAL ALL EXPENSES:		**146,999**	**183,802**	**36,804**	**25%**	**119,584**	**93,959**
	NET INCOME (LOSS):		**41,201**	**23,398**	**(17,804)**	**-43%**	**78,220**	**100,473**

Washington State Bar Association
Budget Comparison

LEGISLATIVE

Cost Center **FY24 FTE** **1.70**
LEG **FY23 FTE** **1.70**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:	**50100**	STAFF TRAVEL/PARKING	3,133	2,500	(633)	-20%	188	124
	50110	STAFF CONFERENCE & TRAINING	2,400	2,496	96	4%	-	1,842
	50120	STAFF MEMBERSHIP DUES	450	450	-	0%	130	-
	50130	SUBSCRIPTIONS	2,000	2,000	-	0%	1,985	1,985
	52660	JUD RECOMMEND COMMITTEE	2,250	2,250	-	0%	-	-
	54910	RENT - OLYMPIA OFFICE	-	1,500	1,500		-	-
	54920	CONTRACT LOBBYIST	15,000	12,500	(2,500)	-17%	10,000	12,500
	54940	LEGISLATIVE COMMITTEE	1,250	1,250	-	0%	9	-
	54970	BOG LEGISLATIVE COMMITTEE	300	300	-	0%	-	-
	TOTAL DIRECT EXPENSES		**26,783**	**25,246**	**(1,537)**	**-6%**	**12,311**	**16,831**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	147,316	152,783	5,468	4%	115,007	95,288
	51299	BENEFITS EXPENSE	42,758	51,375	8,618	20%	52,819	27,577
	51900	OTHER INDIRECT EXPENSE	52,607	52,607	(1)	0%	45,783	32,236
	TOTAL INDIRECT EXPENSES:		**242,681**	**256,765**	**14,085**	**6%**	**213,608**	**155,101**
	TOTAL ALL EXPENSES:		**269,464**	**282,011**	**12,548**	**5%**	**225,920**	**171,932**
	NET INCOME (LOSS):		**(269,464)**	**(282,011)**	**(12,548)**	**5%**	**(225,920)**	**(171,932)**

Washington State Bar Association
Budget Comparison

LEGAL LUNCHBOX

Cost Center **FY24 FTE 0.43**
LLB **FY23 FTE 0.43**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**41450**	SPONSORSHIPS	9,000	9,000	-	0%	9,000	9,000
	43400	DIGITAL VIDEO SALES	14,000	20,000	6,000	43%	30,233	21,021
	43350	MP3 SALES	-	-	-		7,056	-
	TOTAL REVENUE		**23,000**	**29,000**	**6,000**	**26%**	**46,289**	**30,021**
DIRECT EXPENSES:	**53700**	SPEAKERS & PROGRAM DEVELOP	1,500	100	(1,400)	-93%	-	551
	53730	HONORARIUM	-	1,500	1,500		-	-
	55555	ON24 OVERAGE CHARGE	-	1,500	1,500		-	-
	55555	INSURANCE REBATE		(258)	(258)		-	-
	TOTAL DIRECT EXPENSES		**1,500**	**2,842**	**1,342**	**89%**	**-**	**551**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	27,897	28,998	1,101	4%	23,122	18,250
	51299	BENEFITS EXPENSE	10,037	6,094	(3,943)	-39%	10,257	5,918
	51900	OTHER INDIRECT EXPENSE	13,183	13,306	124	1%	11,363	8,059
	55555	INSURANCE REBATE		(4,060)	(4,060)		-	-
	TOTAL INDIRECT EXPENSES:		**51,117**	**44,338**	**(6,778)**	**-13%**	**44,742**	**32,227**
	TOTAL ALL EXPENSES:		**52,617**	**47,180**	**(5,436)**	**-10%**	**44,742**	**32,778**
	NET INCOME (LOSS):		**(29,617)**	**(18,180)**	**11,436**	**-39%**	**1,547**	**(2,757)**

Washington State Bar Association
Budget Comparison

LICENSING & MEMBERSHIP RECORDS

Cost Center **FY24 FTE 3.83**
LICMR **FY23 FTE 3.83**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**41100**	STATUS CERTIFICATE FEES	27,000	27,000	-	0%	29,548	19,425
	42288	INVESTIGATION FEES	21,000	20,000	(1,000)	-5%	22,300	18,000
	42290	PRO HAC VICE	400,000	400,000	-	0%	400,282	258,770
	45040	MEMBER CONTACT INFORMATION	4,000	3,700	(300)	-8%	3,325	1,489
	45060	PHOTO BAR CARD SALES	200	200	-	0%	240	168
	TOTAL REVENUE		**452,200**	**450,900**	**(1,300)**	**0%**	**455,695**	**297,852**
DIRECT EXPENSES:	**50015**	DEPRECIATION	1,151	-	(1,151)	-100%	-	-
	50060	POSTAGE	16,500	17,652	1,152	7%	24,352	18,061
	55010	LICENSING FORMS	2,000	-	(2,000)	-100%	915	2,401
	TOTAL DIRECT EXPENSES		**19,651**	**17,652**	**(1,999)**	**-10%**	**25,267**	**22,212**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	379,520	401,688	22,168	6%	365,027	264,987
	51299	BENEFITS EXPENSE	124,269	135,456	11,187	9%	118,663	81,069
	51900	OTHER INDIRECT EXPENSE	118,521	118,520	(1)	0%	103,296	72,800
	TOTAL INDIRECT EXPENSES:		**622,311**	**655,665**	**33,354**	**5%**	**586,985**	**418,855**
	TOTAL ALL EXPENSES:		**641,962**	**673,317**	**31,355**	**5%**	**612,252**	**441,067**
	NET INCOME (LOSS):		**(189,762)**	**(222,417)**	**(32,655)**	**17%**	**(156,557)**	**(143,215)**

Washington State Bar Association
Budget Comparison

LICENSE FEES
Cost Center
LIC

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**40600**	LICENSE FEES	17,053,467	16,692,574	267,032	2%	16,052,304	10,756,417
	40625	LICENSE FEES - NEW ADMITTEES	-	417,925	-		502,089	273,032
	40650	LICENSE FEES - LATE FEES	-	200,000	-		288,180	268,881
	40675	LICENSE FEES - REINSTATEMENTS	-	10,000	-		15,314	10,620
	TOTAL REVENUE		**17,053,467**	**17,320,499**	**267,032**	**2%**	**16,857,886**	**11,308,950**
	NET INCOME (LOSS):		**17,053,467**	**17,320,499**	**267,032**	**2%**	**16,857,886**	**11,308,950**

Washington State Bar Association
Budget Comparison

LIMITED LICENSE LEGAL TECHNICIAN PROGRAM

Cost Center **FY24 FTE 0.53**
LLLT **FY23 FTE 0.53**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**41800**	SEMINAR REGISTRATIONS	12,000	2,000	(10,000)	-83%	-	-
	42281	LLLT LICENSE FEES	16,622	18,562	1,940	12%	13,542	8,877
	42291	LLLT LATE LICENSE FEES	1,100	-	(1,100)	-100%	99	133
	45220	MEMBER LATE FEES	-	150	150		-	-
	TOTAL REVENUE		**29,722**	**20,712**	**(9,010)**	**-30%**	**19,041**	**9,110**
DIRECT EXPENSES:	**52683**	LLLT BOARD	15,000	14,240	(760)	-5%	5,333	3,909
	52689	LLLT EDUCATION	500	-	(500)	-100%	-	-
	TOTAL DIRECT EXPENSES		**15,500**	**14,240**	**(1,260)**	**-8%**	**14,333**	**3,909**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	51,548	51,460	(88)	0%	44,015	33,741
	51299	BENEFITS EXPENSE	17,299	10,108	(7,192)	-42%	14,235	10,743
	51900	OTHER INDIRECT EXPENSE	16,401	16,401	(0)	0%	12,865	10,208
	TOTAL INDIRECT EXPENSES:		**85,248**	**77,969**	**(7,280)**	**-9%**	**71,114**	**54,692**
	TOTAL ALL EXPENSES:		**100,748**	**92,209**	**(8,540)**	**-8%**	**85,447**	**58,600**
	NET INCOME (LOSS):		**(71,026)**	**(71,497)**	**(470)**	**1%**	**(66,406)**	**(49,490)**

Washington State Bar Association
Budget Comparison

LIMITED PRACTICE OFFICERS

Cost Center **FY24 FTE 0.78**
LPO **FY23 FTE 0.68**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**42288**	INVESTIGATION FEES	500	200	(300)	-60%	500	400
	45110	LPO EXAMINATION FEES	24,000	22,000	(2,000)	-8%	32,350	24,500
	45115	LPO Exam Late Fee	4,300	3,300	(1,000)	-23%	4,600	4,100
	45120	LPO LICENSE FEES	164,750	170,000	5,250	3%	170,168	108,083
	45125	LPO LATE LICENSE FEES	988	2,500	1,512	153%	2,820	2,220
	45140	LPO LICENSE FEES - REINSTATES	550	-	(550)	-100%	230	-
	45220	MEMBER LATE FEES	-	4,000	4,000		8,700	4,350
	TOTAL REVENUE		**195,088**	**202,000**	**6,912**	**4%**	**219,368**	**143,653**
DIRECT EXPENSES:	**50070**	PRINTING & COPYING	250	200	(50)	-20%	123	-
	50110	STAFF CONFERENCE & TRAINING	-	-	-		-	-
	50140	SUPPLIES	-	100	100		72	73
	52210	FACILITY, PARKING, FOOD	9,000	6,300	(2,700)	-30%	4,568	2,168
	52688	EXAM WRITING	9,000	9,000	-	0%	7,663	8,400
	55130	LPO BOARD EXPENSES	1,792	4,000	2,208	123%	-	2,301
	55165	LPO OUTREACH	1,000	1,000	-	0%	-	-
	54380	ONLINE LEGAL RESEARCH	-	-	-		1,908	-
	54390	LAW LIBRARY	-	-	-		3,368	-
	TOTAL DIRECT EXPENSES		**21,042**	**20,600**	**(442)**	**-2%**	**17,702**	**12,942**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	57,874	69,420	11,546	20%	59,420	38,437
	51299	BENEFITS EXPENSE	20,388	14,351	(6,037)	-30%	19,766	12,701
	51900	OTHER INDIRECT EXPENSE	21,043	24,137	3,094	15%	19,675	12,894
	TOTAL INDIRECT EXPENSES:		**99,305**	**107,909**	**8,603**	**9%**	**98,861**	**64,033**
	TOTAL ALL EXPENSES:		**120,347**	**128,509**	**8,161**	**7%**	**116,563**	**76,975**
	NET INCOME (LOSS):		**74,741**	**73,491**	**(1,249)**	**-2%**	**102,805**	**66,679**

Washington State Bar Association
Budget Comparison

MANDATORY CONTINUING LEGAL EDUCATION

Cost Center **FY24 FTE 5.88**
MCLE **FY23 FTE 4.88**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**45210**	ACCREDITED PROGRAM FEES	550,000	550,000	-	0%	615,700	458,100
	45215	FORM 1 LATE FEE	220,000	220,000	-	0%	226,200	175,900
	45220	MEMBER LATE FEES	190,000	190,000	-	0%	422,350	230,600
	45230	ANNUAL ACCREDITED SPONSOR FEES	38,250	36,000	(2,250)	-6%	34,500	38,750
	45250	ATTENDANCE LATE FEES	98,000	90,000	(8,000)	-8%	119,450	87,650
	45255	COMITY CERTIFICATES - REQUEST	14,000	13,800	(200)	-1%	16,825	11,625
	45260	COMITY CERTIFICATES - SUBMIT	15,000	14,000	(1,000)	-7%	29,325	17,425
	TOTAL REVENUE		**1,125,250**	**1,113,800**	**(11,450)**	**-1%**	**1,464,350**	**1,020,050**
DIRECT EXPENSES:	**50100**	STAFF TRAVEL/PARKING	50	50	-	0%	-	-
	50110	STAFF CONFERENCE & TRAINING	4,900	5,096	196	4%	100	250
	50120	STAFF MEMBERSHIP DUES	500	500	-	0%	500	500
	55210	MCLE BOARD EXPENSES	2,000	5,000	3,000	150%	-	-
	55220	DEPRECIATION-SOFTWARE	59,565	130,449	70,884	119%	24,455	5,848
	54380	ONLINE LEGAL RESEARCH	-	-	-		1,908	-
	54390	LAW LIBRARY	-	-	-		138	-
	TOTAL DIRECT EXPENSES		**67,015**	**141,095**	**74,080**	**111%**	**27,102**	**6,598**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	437,860	454,500	16,640	4%	409,522	338,440
	51299	BENEFITS EXPENSE	125,455	143,485	18,030	14%	118,014	81,557
	51900	OTHER INDIRECT EXPENSE	151,014	151,012	(2)	0%	131,306	92,947
	TOTAL INDIRECT EXPENSES:		**714,329**	**748,997**	**34,668**	**5%**	**658,842**	**512,945**
	TOTAL ALL EXPENSES:		**781,344**	**890,092**	**108,748**	**14%**	**685,944**	**519,543**
	NET INCOME (LOSS):		**343,906**	**223,708**	**(120,198)**	**-35%**	**778,406**	**500,507**

Washington State Bar Association
Budget Comparison

MEMBER WELLNESS PROGRAM

Cost Center **FY24 FTE 1.48**
MWP **FY23 FTE 1.48**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**40205**	DIVERSION	7,500	7,500	-	0%	9,375	6,000
	TOTAL REVENUE		**7,500**	**7,500**	**-**	**0%**	**9,375**	**6,000**
DIRECT EXPENSES:	**50100**	STAFF TRAVEL/PARKING	-	400	400		-	-
	50110	STAFF CONFERENCE & TRAINING	300	312	12	4%	165	401
	50120	STAFF MEMBERSHIP DUES	500	700	200	40%	226	226
	50130	SUBSCRIPTIONS	1,200	1,200	-	0%	1,100	851
	54760	PROF LIAB INSURANCE	-	-	-		825	-
	54514	WSBA CONNECTS	-	-	-		8,110	-
	54715	MEMBER WELLNESS COUNCIL	800	1,000	200	25%	-	-
	TOTAL DIRECT EXPENSES		**2,800**	**3,612**	**812**	**29%**	**10,426**	**1,479**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	133,673	133,585	(87)	0%	84,689	74,676
	51299	BENEFITS EXPENSE	55,402	51,955	(3,447)	-6%	51,826	35,536
	51900	OTHER INDIRECT EXPENSE	45,645	45,799	154	0%	39,729	28,206
	TOTAL INDIRECT EXPENSES:		**234,719**	**231,338**	**(3,380)**	**-1%**	**176,244**	**138,419**
	TOTAL ALL EXPENSES:		**237,519**	**234,950**	**(2,568)**	**-1%**	**186,670**	**139,897**
	NET INCOME (LOSS):		**(230,019)**	**(227,450)**	**2,568**	**-1%**	**(177,295)**	**(133,897)**

Washington State Bar Association
Budget Comparison

MEMBER SERVICES & ENGAGEMENT

Cost Center **FY24 FTE** **2.45**
MSE **FY23 FTE** **2.51**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**40900**	ROYALTIES	10,800	10,800	-	0%	13,200	10,738
	41450	SPONSORSHIPS	1,000	-	(1,000)	-100%	-	-
	TOTAL REVENUE		**11,800**	**10,800**	**(1,000)**	**-8%**	**13,200**	**10,738**
DIRECT EXPENSES:	**50070**	PRINTING & COPYING	1,200	1,300	100	8%	-	1,300
	50085	YLL SECTION PROGRAM	1,500	1,500	-	0%	550	545
	50095	CLE COMPS	1,000	1,000	-	0%	159	-
	50100	STAFF TRAVEL/PARKING	1,700	2,500	800	47%	206	189
	50110	STAFF CONFERENCE & TRAINING	250	260	10	4%	-	164
	50120	STAFF MEMBERSHIP DUES	850	845	(5)	-1%	649	300
	54610	LIBRARY MATERIALS/RESOURCES	4,000	4,000	-	0%	1,712	174
	55266	NEW LAWYER OUTREACH EVENTS	1,500	1,500	-	0%	891	250
	55270	NEW LAWYERS COMMITTEE	12,000	13,500	1,500	13%	2,003	1,178
	55285	OPEN SECTIONS NIGHT	3,500	-	(3,500)	-100%	-	-
	55555	MEMBER ENGAGEMENT COUNCIL		1,000	1,000		-	-
	55555	SMALL TOWN AND RURAL COMMITTEE OUTREACH AND ACTIVITIES	-	55,000	55,000		-	-
	55980	SMALL TOWN AND RURAL COMMITTEE	3,000	5,000	2,000	67%	-	2,659
	58450	RECEPTION/FORUM EXPENSE	3,000	1,000	(2,000)	-67%	95	-
	58500	NEW LAWYER OUTREACH	1,000	1,000	-	0%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	5,000	-	0%	-	-
	TOTAL DIRECT EXPENSES		**39,500**	**94,405**	**54,905**	**139%**	**6,265**	**6,759**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	165,522	167,808	2,287	1%	232,972	109,388
	51299	BENEFITS EXPENSE	59,907	54,555	(5,351)	-9%	76,065	38,612
	51900	OTHER INDIRECT EXPENSE	77,549	75,816	(1,734)	-2%	93,079	47,817
	TOTAL INDIRECT EXPENSES:		**302,978**	**298,180**	**(4,798)**	**-2%**	**402,117**	**195,816**
	TOTAL ALL EXPENSES:		**342,478**	**392,585**	**50,107**	**15%**	**408,382**	**202,575**
	NET INCOME (LOSS):		**(330,678)**	**(381,785)**	**(51,107)**	**15%**	**(395,182)**	**(191,837)**

Washington State Bar Association
Budget Comparison

MINI CLE

Cost Center **FY24 FTE 0.92**
MINI **FY23 FTE 0.92**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	64,627	66,852	2,225	3%	52,466	43,196
	51299	BENEFITS EXPENSE	21,315	15,699	(5,615)	-26%	22,322	13,334
	51900	OTHER INDIRECT EXPENSE	28,470	28,470	(0)	0%	24,594	17,461
	TOTAL INDIRECT EXPENSES:		**114,412**	**111,021**	**(3,391)**	**-3%**	**99,382**	**73,991**
	NET INCOME (LOSS):		**(114,412)**	**(111,021)**	**3,391**	**-3%**	**(99,382)**	**(73,991)**

Washington State Bar Association
Budget Comparison

NEW MEMBER EDUCATION

Cost Center **FY24 FTE** **0.84**
NME **FY23 FTE** **0.78**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**40950**	NMP PRODUCT SALES	65,000	40,000	(25,000)	-38%	39,844	18,872
	41800	SEMINAR REGISTRATIONS	8,000	15,000	7,000	88%	-	62,221
	47100	TRIAL ADVOCACY PROGRAM	12,000	12,000	-	0%	6,071	16,128
	TOTAL REVENUE		**85,000**	**67,000**	**(18,000)**	**-21%**	**45,915**	**97,221**
DIRECT EXPENSES:	**55265**	SPEAKERS & PROGRAM DEVELOPMENT	100	250	150	150%	-	-
	57320	TRIAL ADVOCACY EXPENSES	1,500	1,500	-	0%	-	-
	TOTAL DIRECT EXPENSES		**1,600**	**1,750**	**150**	**9%**	**-**	**-**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	53,555	59,225	5,670	11%	46,244	35,780
	51299	BENEFITS EXPENSE	17,577	12,784	(4,792)	-27%	18,340	10,788
	51900	OTHER INDIRECT EXPENSE	24,137	25,994	1,856	8%	21,189	14,775
	TOTAL INDIRECT EXPENSES:		**95,269**	**98,003**	**2,734**	**3%**	**85,773**	**61,343**
	TOTAL ALL EXPENSES:		**96,869**	**99,753**	**2,884**	**3%**	**85,773**	**61,343**
	NET INCOME (LOSS):		**(11,869)**	**(32,753)**	**(20,884)**	**176%**	**(39,858)**	**35,878**

Washington State Bar Association
Budget Comparison

OFFICE OF GENERAL COUNSEL

Cost Center **FY24 FTE 6.07**
OGC **FY23 FTE 6.17**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**40210**	RECORDS REQUEST FEES	963	-	(963)	-100%	1,126	-
	TOTAL REVENUE		**963**	**-**	**(963)**	**-100%**	**1,126**	**-**
DIRECT EXPENSES:	**50100**	STAFF TRAVEL/PARKING	500	-	(500)	-100%	262	28
	50110	STAFF CONFERENCE & TRAINING	6,400	6,656	256	4%	1,687	2,377
	50120	STAFF MEMBERSHIP DUES	1,150	2,868	1,718	149%	254	1,250
	50135	TRANSCRIPTION SERVICES	-	2,100	-		-	-
	52240	DISABILITY ACCOMMODATIONS	-	6,000	6,000		455	59
	54360	LITIGATION EXPENSES	200	200	-	0%	146	-
	55419	COURT RULES COMMITTEE	1,000	1,000	-	0%	0	-
	55615	WILLS	2,000	2,000	-	0%	-	-
	55620	CUSTODIANSHIP	8,150	5,000	(3,150)	-39%	245	199
	TOTAL DIRECT EXPENSES		**19,400**	**25,824**	**4,324**	**22%**	**16,377**	**3,913**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	656,837	675,398	18,561	3%	610,191	376,985
	51299	BENEFITS EXPENSE	188,816	193,104	4,288	2%	184,318	124,182
	51900	OTHER INDIRECT EXPENSE	192,481	187,837	(4,644)	-2%	164,213	118,199
	TOTAL INDIRECT EXPENSES:		**1,038,134**	**1,056,339**	**18,205**	**2%**	**958,722**	**619,366**
	TOTAL ALL EXPENSES:		**1,057,534**	**1,082,163**	**22,529**	**2%**	**975,098**	**623,278**
	NET INCOME (LOSS):		**(1,056,571)**	**(1,082,163)**	**(23,492)**	**2%**	**(973,973)**	**(623,278)**

Washington State Bar Association
Budget Comparison

OFFICE OF THE EXECUTIVE DIRECTOR

Cost Center **FY24 FTE 3.20**
OED **FY23 FTE 2.00**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
DIRECT EXPENSES:	**50100**	STAFF TRAVEL/PARKING	1,500	4,450	2,950	197%	628	1,422
	50110	STAFF CONFERENCE & TRAINING	8,925	9,282	357	4%	4,564	7,651
	50120	STAFF MEMBERSHIP DUES	1,000	1,890	890	89%	1,346	535
	54390	LAW LIBRARY	-	-	-		138	-
	50145	SURVEYS	350	-	(350)	-100%	331	681
	52125	LEADERSHIP TRAINING	20,000	20,000	-	0%	-	6,160
	52585	WASHINGTON LEADERSHIP INSTITUTE	80,000	80,000	-	0%	44,764	-
	52590	BAR LEADERS CONFERENCE	12,000	-	(12,000)	-100%	-	8,497
	52840	ED TRAVEL & OUTREACH	5,000	5,000	-	0%	1,529	1,358
	TOTAL DIRECT EXPENSES		**128,775**	**120,622**	**(8,153)**	**-6%**	**53,301**	**26,303**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	402,379	506,642	104,262	26%	314,330	261,280
	51299	BENEFITS EXPENSE	103,989	128,828	24,839	24%	89,784	68,101
	51900	OTHER INDIRECT EXPENSE	61,891	99,025	37,134	60%	54,095	38,146
	TOTAL INDIRECT EXPENSES:		**568,259**	**734,494**	**166,235**	**29%**	**458,209**	**367,527**
	TOTAL ALL EXPENSES:		**697,034**	**855,116**	**158,082**	**23%**	**511,510**	**393,831**
	NET INCOME (LOSS):		**(697,034)**	**(855,116)**	**(158,082)**	**23%**	**(511,510)**	**(393,831)**

Washington State Bar Association
Budget Comparison

OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD

Cost Center **FY24 FTE 1.40**
OGCDB **FY23 FTE 1.40**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
DIRECT EXPENSES:	**50120**	STAFF MEMBERSHIP DUES	100	100	-	0%	-	-
	54310	COURT REPORTERS	-	500	500		572	-
	55310	DISCIPLINARY BOARD EXPENSES	4,000	4,000	-	0%	1	-
	55320	CHIEF HEARING OFFICER	30,000	40,000	10,000	33%	30,000	20,000
	55330	HEARING OFFICER EXPENSES	17,500	4,000	(13,500)	-77%	2,763	891
	55340	HEARING OFFICER TRAINING	400	400	-	0%	-	-
	55370	OUTSIDE COUNSEL	60,000	48,000	(12,000)	-20%	48,000	32,000
	55380	DISCIPLINARY SELECTION PANEL	-	1,000	1,000		-	-
	54390	LAW LIBRARY	-	-	-		836	-
	TOTAL DIRECT EXPENSES		**112,000**	**98,000**	**(14,000)**	**-13%**	**82,171**	**52,891**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	133,790	136,708	2,918	2%	109,680	90,796
	51299	BENEFITS EXPENSE	40,026	38,683	(1,343)	-3%	31,616	25,720
	51900	OTHER INDIRECT EXPENSE	43,324	43,323	(0)	0%	35,189	26,595
	TOTAL INDIRECT EXPENSES:		**217,139**	**218,714**	**1,575**	**1%**	**176,484**	**143,110**
	TOTAL ALL EXPENSES:		**329,139**	**316,714**	**(12,425)**	**-4%**	**258,656**	**196,001**
	NET INCOME (LOSS):		**(329,139)**	**(316,714)**	**12,425**	**-4%**	**(258,656)**	**(196,001)**

Washington State Bar Association
Budget Comparison

PRACTICE OF LAW BOARD

Cost Center **FY24 FTE 0.55**
PLB **FY23 FTE 0.45**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
DIRECT EXPENSES:	**55510**	PRACTICE OF LAW BOARD	12,000	12,000	-	0%	-	2,220
	TOTAL DIRECT EXPENSES		**12,000**	**12,000**	**-**	**0%**	**-**	**2,220**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	35,965	47,419	11,454	32%	45,270	23,971
	51299	BENEFITS EXPENSE	13,465	12,513	(952)	-7%	12,250	8,149
	51900	OTHER INDIRECT EXPENSE	13,925	17,020	3,094	22%	12,865	8,865
	TOTAL INDIRECT EXPENSES:		**63,355**	**76,952**	**13,597**	**21%**	**70,384**	**40,985**
	TOTAL ALL EXPENSES:		**75,355**	**88,952**	**13,597**	**18%**	**70,384**	**43,205**
	NET INCOME (LOSS):		**(75,355)**	**(88,952)**	**(13,597)**	**18%**	**(70,384)**	**(43,205)**

Washington State Bar Association
Budget Comparison

PRACTICE MANAGEMENT ASSISTANCE

Cost Center **FY24 FTE 0.95**
PMA **FY23 FTE 0.95**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**40900**	ROYALTIES	50,000	62,000	12,000	24%	62,097	50,166
	TOTAL REVENUE		**50,000**	**62,000**	**12,000**	**24%**	**62,097**	**50,166**
					-			
DIRECT EXPENSES:	**50100**	STAFF TRAVEL/PARKING	-	350	350		-	-
	50110	STAFF CONFERENCE & TRAINING	250	260	10	4%	-	500
	50120	STAFF MEMBERSHIP DUES	150	150	-	0%	-	150
	50130	SUBSCRIPTIONS	-	-	-		132	-
	55250	CASEMAKER/FASTCASE	73,000	75,000	2,000	3%	75,064	72,966
	TOTAL DIRECT EXPENSES		**73,400**	**75,760**	**2,360**	**3%**	**75,196**	**73,616**
					-			
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	80,135	83,329	3,193	4%	-	53,320
	51299	BENEFITS EXPENSE	23,499	25,485	1,986	8%	-	14,906
	51900	OTHER INDIRECT EXPENSE	29,398	29,398	(0)	0%	-	17,998
	TOTAL INDIRECT EXPENSES:		**133,033**	**138,212**	**5,179**	**4%**	**-**	**86,225**
	TOTAL ALL EXPENSES:		**206,433**	**213,972**	**7,539**	**4%**	**75,196**	**159,841**
	NET INCOME (LOSS):		**(156,433)**	**(151,972)**	**4,461**	**-3%**	**(13,099)**	**(109,675)**

Washington State Bar Association
Budget Comparison

PROFESSIONAL RESPONSIBILITY PROGRAM

Cost Center **FY24 FTE 1.10**
PRP **FY23 FTE 1.10**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
DIRECT EXPENSES:	**50100**	STAFF TRAVEL/PARKING	750	750	-	0%	211	1,075
	50120	STAFF MEMBERSHIP DUES	500	500	-	0%	-	500
	55610	CPE COMMITTEE	1,000	1,000	-	0%	-	890
	54390	LAW LIBRARY	-	-	-		559	-
	TOTAL DIRECT EXPENSES		**2,250**	**2,250**	**-**	**0%**	**770**	**2,465**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	91,667	138,408	46,741	51%	155,587	91,427
	51299	BENEFITS EXPENSE	37,219	64,864	27,644	74%	59,507	37,195
	51900	OTHER INDIRECT EXPENSE	22,435	34,040	11,604	52%	43,123	20,953
	TOTAL INDIRECT EXPENSES:		**151,321**	**237,311**	**85,990**	**57%**	**258,216**	**149,575**
	TOTAL ALL EXPENSES:		**153,571**	**239,561**	**85,990**	**56%**	**258,987**	**152,040**
	NET INCOME (LOSS):		**(153,571)**	**(239,561)**	**(85,990)**	**56%**	**(258,987)**	**(152,040)**

Washington State Bar Association
Budget Comparison

PUBLIC SERVICE PROGRAMS

Cost Center **FY24 FTE 1.62**
PSP **FY23 FTE 1.62**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**40300**	DONATIONS & GRANTS	130,000	130,000	-	0%	130,000	130,000
	TOTAL REVENUE		**130,000**	**130,000**	**-**	**0%**	**130,000**	**130,000**
DIRECT EXPENSES:	**50037**	DONATIONS/SPONSORSHIPS/GRANTS	260,828	274,997	14,169	5%	248,960	97,237
	50100	STAFF TRAVEL/PARKING	1,500	500	(1,000)	-67%	188	-
	50110	STAFF CONFERENCE & TRAINING	1,000	1,040	40	4%	-	-
	50145	SURVEYS	100	100	-	0%	-	-
	52110	PRO BONO & LEGAL AID COMMITTEE	1,500	2,500	1,000	67%	126	393
	54130	PRO BONO CERTIFICATES	2,000	2,000	-	0%	1,655	457
	TOTAL DIRECT EXPENSES		**266,928**	**281,137**	**14,209**	**5%**	**250,929**	**98,087**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	128,588	128,379	(209)	0%	79,567	68,372
	51299	BENEFITS EXPENSE	40,609	53,137	12,528	31%	32,783	26,023
	51900	OTHER INDIRECT EXPENSE	50,132	50,131	(1)	0%	35,189	30,893
	TOTAL INDIRECT EXPENSES:		**219,329**	**231,647**	**12,319**	**6%**	**147,539**	**125,287**
	TOTAL ALL EXPENSES:		**486,257**	**512,784**	**26,528**	**5%**	**398,468**	**223,374**
	NET INCOME (LOSS):		**(356,257)**	**(382,784)**	**(26,528)**	**7%**	**(268,468)**	**(93,374)**

Washington State Bar Association
Budget Comparison

PUBLICATION & DESIGN SERVICES

Cost Center **FY24 FTE 0.89**
PUB **FY23 FTE 0.89**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
DIRECT EXPENSES:	**50110**	STAFF CONFERENCE & TRAINING	350	364	14	4%	-	-
	50130	SUBSCRIPTIONS	162	200	38	23%	100	100
	54026	IMAGE LIBRARY	4,100	4,100	-	0%	4,100	4,100
	TOTAL DIRECT EXPENSES		**4,612**	**4,664**	**52**	**1%**	**4,200**	**4,200**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	72,143	72,960	817	1%	64,015	48,721
	51299	BENEFITS EXPENSE	19,491	19,222	(269)	-1%	18,840	12,139
	51900	OTHER INDIRECT EXPENSE	27,542	27,541	(0)	0%	23,837	16,924
	TOTAL INDIRECT EXPENSES:		**119,175**	**119,724**	**548**	**0%**	**106,692**	**77,783**
	TOTAL ALL EXPENSES:		**123,787**	**124,388**	**600**	**0%**	**110,892**	**81,983**
	NET INCOME (LOSS):		**(123,787)**	**(124,388)**	**(600)**	**0%**	**(110,892)**	**(81,983)**

Washington State Bar Association
Budget Comparison

REGULATORY SERVICES FTE
Cost Center **FY24 FTE 2.60**
RSD FTE **FY23 FTE 2.70**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
	50100	STAFF TRAVEL/PARKING	-	650	-		-	168
DIRECT EXPENSES:	**50110**	STAFF CONFERENCE & TRAINING	23,550	24,492	942	4%	-	5,865
	TOTAL DIRECT EXPENSES		**23,550**	**25,142**	**942**	**4%**	**-**	**6,033**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	349,467	357,120	7,653	2%	318,261	235,110
	51299	BENEFITS EXPENSE	103,888	84,889	(19,000)	-18%	100,039	67,905
	51900	OTHER INDIRECT EXPENSE	83,553	80,457	(3,095)	-4%	74,918	51,309
	TOTAL INDIRECT EXPENSES:		**536,908**	**522,466**	**(14,442)**	**-3%**	**493,218**	**354,324**
	TOTAL ALL EXPENSES:		**560,458**	**547,608**	**(13,500)**	**-2%**	**493,218**	**360,357**
	NET INCOME (LOSS):		**(560,458)**	**(547,608)**	**13,500**	**-2%**	**(493,218)**	**(360,357)**

Washington State Bar Association
Budget Comparison

SECTIONS ADMINISTRATION

Cost Center **FY24 FTE** **2.58**
SECT **FY23 FTE** **2.58**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**48010**	REIMBURSEMENTS FROM SECTIONS	290,543	297,786	7,243	2%	273,426	353,989
	TOTAL REVENUE		**290,543**	**297,786**	**7,243**	**2%**	**273,426**	**353,989**
DIRECT EXPENSES:	**50100**	STAFF TRAVEL/PARKING	750	1,000	250	33%	209	14
	50110	STAFF CONFERENCE & TRAINING	500	520	20	4%	-	65
	50120	STAFF MEMBERSHIP DUES	250	200	(50)	-20%	-	45
	50130	SUBSCRIPTIONS	350	350	-	0%	331	331
	52540	SECTION/COMMITTEE CHAIR MTGS	1,000	1,000	-	0%	-	456
	58010	DUES STATEMENTS	5,000	-	(5,000)	-100%	4,593	-
	TOTAL DIRECT EXPENSES		**7,850**	**3,070**	**(4,780)**	**-61%**	**5,133**	**911**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	149,581	156,563	6,982	5%	137,704	100,517
	51299	BENEFITS EXPENSE	61,326	60,021	(1,306)	-2%	58,748	39,425
	51900	OTHER INDIRECT EXPENSE	79,839	79,839	(1)	0%	69,620	49,160
	TOTAL INDIRECT EXPENSES:		**290,746**	**296,422**	**5,675**	**2%**	**266,072**	**189,102**
	TOTAL ALL EXPENSES:		**298,596**	**299,492**	**895**	**0%**	**271,205**	**190,012**
	NET INCOME (LOSS):		**(8,053)**	**(1,706)**	**6,348**	**-79%**	**2,221**	**163,976**

Washington State Bar Association
Budget Comparison

SERVICE CENTER
Cost Center **FY24 FTE 5.78**
SC **FY23 FTE 5.71**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-	-	-	-
DIRECT EXPENSES:	**50100**	STAFF TRAVEL/PARKING	-	2,376	-		-	1,782
	50110	STAFF CONFERENCE & TRAINING	2,100	2,184	84	4%	46	-
	54400	TRANSLATION SERVICES	8,200	-	(8,200)	-100%	6,790	3,105
	TOTAL DIRECT EXPENSES		**10,300**	**4,560**	**(8,116)**	**-79%**	**7,016**	**4,887**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	383,690	394,527	10,837	3%	359,931	261,222
	51299	BENEFITS EXPENSE	142,992	159,924	16,932	12%	135,002	93,118
	51900	OTHER INDIRECT EXPENSE	176,699	178,863	2,164	1%	153,997	108,796
	TOTAL INDIRECT EXPENSES:		**703,381**	**733,314**	**29,933**	**4%**	**648,930**	**463,136**
	TOTAL ALL EXPENSES:		**713,681**	**737,874**	**21,817**	**3%**	**655,946**	**468,023**
	NET INCOME (LOSS):		**(713,681)**	**(737,874)**	**(21,817)**	**3%**	**(655,946)**	**(468,023)**

Washington State Bar Association
Budget Comparison

TECHNOLOGY
Cost Center **FY24 FTE 13.00**
TECH **FY23 FTE 13.00**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:	**50033**	CONSULTING SERVICES	110,000	114,800	4,800	4%	66,944	94,214
	50100	STAFF TRAVEL/PARKING	2,000	2,000	-	0%	2,077	230
	50110	STAFF CONFERENCE & TRAINING	10,000	10,400	400	4%	-	-
	50120	STAFF MEMBERSHIP DUES	450	450	-	0%	-	-
	50160	TELEPHONE	95,000	95,000	-	0%	81,303	59,637
	55555	CLOUD INFRASTRUCTURE	-	100,000	100,000		-	-
	56100	COMPUTER HARDWARE	65,000	71,000	6,000	9%	67,315	55,120
	56150	COMPUTER SOFTWARE	310,000	345,300	35,300	11%	184,289	168,302
	56225	HARDWARE SERVICE & WARRANTIES	60,000	65,000	5,000	8%	49,719	44,432
	56230	SOFTWARE MAINT & LICENSING	380,000	400,000	20,000	5%	375,274	297,623
	56500	COMPUTER SUPPLIES	2,000	-	(2,000)	-100%	3,103	-
	56550	THIRD PARTY SERVICES	40,000	20,000	(20,000)	-50%	22,446	28,227
	56900	TRANSFER TO INDIRECT EXPENSES	(1,074,450)	(1,223,950)	(149,500)	14%	(852,470)	(697,293)
	TOTAL DIRECT EXPENSES		**-**	**-**	**-**		**0**	**50,491**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	1,434,416	1,434,388	(29)	0%	1,277,147	940,451
	51299	BENEFITS EXPENSE	439,894	476,253	36,359	8%	391,726	289,606
	51955	CAPITAL LABOR & OVERHEAD	(280,000)	(210,000)	70,000	-25%	(267,632)	(185,558)
	51900	OTHER INDIRECT EXPENSE	402,292	402,287	(4)	0%	350,372	247,411
	TOTAL INDIRECT EXPENSES:		**1,996,602**	**2,102,928**	**106,326**	**5%**	**1,751,613**	**1,291,909**
	TOTAL ALL EXPENSES:		**1,996,602**	**2,102,928**	**106,326**	**5%**	**1,751,613**	**1,342,401**
	NET INCOME (LOSS):		**(1,996,602)**	**(2,102,928)**	**(106,326)**	**5%**	**(1,751,613)**	**(1,342,401)**

Washington State Bar Association
Budget Comparison

VOLUNTEER ENGAGEMENT

Cost Center **FY24 FTE** **0.60**
VE **FY23 FTE** **0.60**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:	**50015**	DEPRECIATION	-	-	-		-	-
	50110	STAFF CONFERENCE & TRAINING	2,500	2,600	100	4%	1,090	2,450
	50120	STAFF MEMBERSHIP DUES	350	450	100	29%	856	498
	50130	SUBSCRIPTIONS	-	750	750		-	-
	52520	ABA DELEGATES	15,000	14,000	(1,000)	-7%	5,828	4,324
	TOTAL DIRECT EXPENSES		**17,850**	**17,800**	**(50)**	**0%**	**7,773**	**7,272**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	59,415	60,485	1,071	2%	56,934	42,062
	51299	BENEFITS EXPENSE	19,657	17,554	(2,104)	-11%	19,270	12,236
	51900	OTHER INDIRECT EXPENSE	18,567	18,567	(0)	0%	15,903	11,551
	TOTAL INDIRECT EXPENSES:		**97,639**	**96,606**	**(1,033)**	**-1%**	**92,108**	**65,849**
	TOTAL ALL EXPENSES:		**115,489**	**114,406**	**(1,083)**	**-1%**	**99,881**	**73,122**
	NET INCOME (LOSS):		**(115,489)**	**(114,406)**	**1,083**	**-1%**	**(99,881)**	**(73,122)**

ATTACHMENT B

Washington State Bar Association
Budget Comparison

CLE - PRODUCTS
Cost Center **FY24 FTE 1.29**
CLEP **FY23 FTE 1.30**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**41000**	SHIPPING & HANDLING	100	300	200	200%	225	99
	43200	COURSEBOOK SALES	7,000	10,000	3,000	43%	1,790	770
	43400	DIGITAL VIDEO SALES	910,000	900,000	(10,000)	-1%	1,204,159	689,973
	43350	MP3 SALES	-	-	-		96,632	-
	TOTAL REVENUE		**917,100**	**910,300**	**(6,800)**	**-1%**	**1,302,806**	**690,842**
DIRECT EXPENSES:	**50110**	STAFF CONFERENCE & TRAINING	300	312	12	4%	-	-
	50120	STAFF MEMBERSHIP DUES	200	-	(200)	-100%	-	-
	52240	DISABILITY ACCOMMODATIONS	2,000	2,000	-	0%	-	-
	53220	COST OF SALES - COURSEBOOKS	690	1,100	410	59%	141	91
	53250	A/V DEVELOP COSTS (RECORDING)	1,250	-	(1,250)	-100%	-	-
	53255	CLE-EQUIP-DEPRECIATION	1,309	2,040	731	56%	1,312	2,233
	53285	ONLINE PRODUCT HOSTING EXPENSES	53,000	53,000	-	0%	51,091	31,932
	53330	POSTAGE & DELIVRY-COURSEBOOKS	-	500	500		173	34
	TOTAL DIRECT EXPENSES		**58,749**	**58,952**	**203**	**0%**	**52,716**	**34,289**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	93,769	95,891	2,122	2%	84,503	53,060
	51299	BENEFITS EXPENSE	36,718	29,670	(7,049)	-19%	34,904	23,364
	51900	OTHER INDIRECT EXPENSE	41,778	39,919	(1,859)	-4%	35,189	24,515
	TOTAL INDIRECT EXPENSES:		**172,265**	**165,480**	**(6,785)**	**-4%**	**154,596**	**100,938**
	TOTAL ALL EXPENSES:		**231,014**	**224,432**	**(6,582)**	**-3%**	**207,313**	**135,228**
	NET INCOME (LOSS):		**686,086**	**685,868**	**(218)**	**0%**	**1,095,493**	**555,614**

Washington State Bar Association
Budget Comparison

CLE - SEMINARS

Cost Center **FY24 FTE** **6.60**
CLES **FY23 FTE** **6.83**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**41800**	SEMINAR REGISTRATIONS	850,000	825,000	(25,000)	-3%	633,144	441,806
	41825	SEMINAR REVENUE-OTHER	20,000	20,000	-	0%	12,000	16,270
	41850	SEMINAR SPLITS W/ CLE	(133,375)	(150,000)	(16,625)	12%	(261,469)	-
	TOTAL REVENUE		**736,625**	**695,000**	**(41,625)**	**-6%**	**383,675**	**458,076**
DIRECT EXPENSES:	**50100**	STAFF TRAVEL/PARKING	15,000	15,000	-	0%	9,428	3,745
	50110	STAFF CONFERENCE & TRAINING	2,370	2,465	95	4%	-	-
	50120	STAFF MEMBERSHIP DUES	1,500	1,000	(500)	-33%	1,145	902
	50140	SUPPLIES	-	500	500		-	-
	52240	DISABILITY ACCOMMODATIONS	2,000	5,000	3,000	150%	-	-
	53610	COURSEBOOK PRODUCTION	1,000	500	(500)	-50%	-	-
	53620	POSTAGE - FLIERS/CATALOGS	5,000	-	(5,000)	-100%	149	-
	53640	ACCREDITATION FEES	3,000	3,000	-	0%	1,788	2,712
	53660	SEMINAR BROCHURES	20,000	-	(20,000)	-100%	-	-
	53690	FACILITIES	165,200	160,500	(4,700)	-3%	71,651	53,098
	53700	SPEAKERS & PROGRAM DEVELOP	32,000	45,000	13,000	41%	13,690	13,410
	53730	HONORARIUM	1,200	3,000	1,800	150%	3,000	-
	53740	CLE SEMINAR COMMITTEE	200	200	-	0%	-	-
	TOTAL DIRECT EXPENSES		**248,470**	**236,165**	**(12,305)**	**-5%**	**100,850**	**73,867**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	502,652	487,487	(15,166)	-3%	487,740	344,886
	51299	BENEFITS EXPENSE	183,351	157,513	(25,838)	-14%	184,581	119,675
	51900	OTHER INDIRECT EXPENSE	221,267	204,238	(17,029)	-8%	183,888	130,018
	TOTAL INDIRECT EXPENSES:		**907,270**	**849,237**	**(58,033)**	**-6%**	**856,210**	**594,579**
	TOTAL ALL EXPENSES:		**1,155,740**	**1,085,402**	**(70,338)**	**-6%**	**957,060**	**668,446**
	NET INCOME (LOSS):		**(419,115)**	**(390,402)**	**28,713**	**-7%**	**(573,385)**	**(210,370)**

Washington State Bar Association
Budget Comparison

DESKBOOKS
Cost Center **FY24 FTE 1.65**
DESK **FY23 FTE 1.50**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**43100**	DESKBOOK SALES (LEXISNEXIS PRINT)	150,000	30,000	(120,000)	-80%	20,218	31,198
	43450	SECTION PUBLICATION SALES	6,000	1,500	(4,500)	-75%	1,863	1,850
	43455	LEXIS/NEXIS ROYALTIES	35,000	75,000	40,000	114%	63,653	19,120
	43525	CASEMAKER ROYALTIES	50,000	30,000	(20,000)	-40%	28,934	15,607
	TOTAL REVENUE		**241,000**	**136,500**	**(104,500)**	**-43%**	**114,668**	**67,774**
DIRECT EXPENSES:	**50110**	STAFF CONFERENCE & TRAINING	1,000	1,040	40	4%	-	-
	50120	STAFF MEMBERSHIP DUES	225	225	-	0%	221	226
	50130	SUBSCRIPTIONS	-	50	50		-	39
	53210	COST OF SALES - DESKBOOKS	65,000	25,000	(40,000)	-62%	29,719	4,966
	53225	COST OF SALES - SECTION PUBLIC	1,500	500	(1,000)	-67%	2,437	832
	53265	SPLITS TO SECTIONS	300	300	-	0%	356	207
	53270	DESKBOOK ROYALTIES	300	300	-	0%	310	92
	53320	POSTAGE & DELIVRY-COURSEBOOKS	-	-	-		-	90
	54380	ONLINE LEGAL RESEARCH	-	-	-		1,908	-
	TOTAL DIRECT EXPENSES		**68,325**	**27,415**	**(40,910)**	**-60%**	**34,951**	**6,451**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	132,287	155,883	23,595	18%	127,561	89,861
	51299	BENEFITS EXPENSE	41,948	48,209	6,261	15%	40,522	26,890
	51900	OTHER INDIRECT EXPENSE	48,175	51,060	2,884	6%	40,486	28,475
	TOTAL INDIRECT EXPENSES:		**222,410**	**255,151**	**32,740**	**15%**	**208,568**	**145,226**
	TOTAL ALL EXPENSES:		**290,735**	**282,566**	**(8,170)**	**-3%**	**243,519**	**151,677**
	NET INCOME (LOSS):		**(49,735)**	**(146,066)**	**(96,330)**	**194%**	**(128,851)**	**(83,902)**

ATTACHMENT C

Washington State Bar Association
Budget Comparison

CLIENT PROTECTION FUND
Cost Center **FY24 FTE** **1.23**
CPF **FY23 FTE** **1.23**

			FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
REVENUE:	**40500**	INTEREST - INVESTMENTS	-	60,000	60,000		35,955	153,994
	44820	CPF RESTITUTION	40,000	10,000	(30,000)	-75%	8,906	6,063
	44840	CPF MEMBER ASSESSMENTS	690,000	525,930	(164,070)	-24%	704,366	700,830
	TOTAL REVENUE		**730,000**	**595,930**	**(134,070)**	**-18%**	**749,227**	**860,887**
DIRECT EXPENSES:	**50020**	BANK FEES	2,100	3,000	900	43%	2,145	1,647
	50120	STAFF MEMBERSHIP DUES	200	200	-	0%	-	-
	54810	GIFTS TO INJURED CLIENTS	500,000	500,000	-	0%	566,947	82,963
	54820	CPF BOARD	-	2,000	2,000		390	781
	TOTAL DIRECT EXPENSES		**502,300**	**505,200**	**2,900**	**1%**	**569,482**	**85,392**
INDIRECT EXPENSES:	**51199**	SALARY EXPENSE	104,797	110,717	5,920	6%	95,157	70,082
	51299	BENEFITS EXPENSE	37,207	35,519	(1,689)	-5%	34,036	23,587
	51900	OTHER INDIRECT EXPENSE	39,907	38,063	(1,845)	-5%	33,297	23,371
	TOTAL INDIRECT EXPENSES:		**181,912**	**184,298**	**2,386**	**1%**	**162,490**	**117,041**
	TOTAL ALL EXPENSES:		**684,212**	**689,498**	**5,286**	**1%**	**731,972**	**202,432**
	NET INCOME (LOSS):		**45,788**	**(93,568)**	**(139,356)**	**-304%**	**17,256**	**658,455**

ATTACHMENT D

Washington State Bar Association
Section Budget Comparison

All Sections

		FY2023 Budget	FY2024 Budget	FY24 vs FY23 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SECTOPS							
REVENUE:							
	SECTION DUES	440,225	385,680	(54,545)	-12%	416,055	564,144
	CLE SECTION SPLITS PROJECTIONS	0	-	-		(101,660)	-
	INTEREST INCOME	13,120	14,912	1,792	14%	10,935	-
	PUBLICATIONS REVENUE	2,000	1,500	(500)	-25%	1,923	1,029
	OTHER	46,880	76,590	29,710	63%	38,196	11,940
	SEMINAR PROFIT SHARE	147,470	118,325	(29,145)	-20%	396,244	-
		649,695	**597,007**	**(52,688)**	**-8%**	**761,693**	**577,113**
DIRECT EXPENSES:							
	DIRECT EXPENSES OF SECTION ACTIVITIES	632,503	606,700	-25,803	-4%	194,459	144,005
	REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES	272,143	246,782	-25,361	-9%	273,426	353,989
	SOCIAL MEDIA		500	500			
		904,646	**853,982**	**(50,664)**	**-6%**	**467,886**	**497,994**
		(254,951)	**(256,975)**	**(2,024)**	**1%**	**293,807**	**79,119**

Washington State Bar Association
Section Budget Comparison

SACPU	ANTITRUST, CONSUMER PROTECTION & UNFAIR BUSINESS PRACTICES SECTION	FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
40500	INTEREST - INVESTMENTS	630	548	(82)	-13%	376	-
41805	MINI-CLE REVENUE	240	240	-	0%	-	-
48200	SECTION DUES REVENUE	4,775	4,600	(175)	-4%	4,538	6,188
TOTAL REVENUE		**5,645**	**5,388**	**(257)**	**-5%**	**4,913**	**6,188**
58300	EXECUTIVE COMMITTEE EXPENSES	750	750	-	0%	-	-
58325	LDSHIP/PROF DEVELOP/RETREATS	500	500	-	0%	-	-
58350	MEMBERSHIP & RECRUITING EXP	100	100	-	0%	-	-
58400	PER MEMBER CHARGE	3,373	3,397	24	1%	3,382	4,430
58450	RECEPTION/FORUM EXPENSE	690	690	-	0%	-	-
58525	SCHOLARSHIPS/DONATIONS/GRANT	6,000	6,000	-	0%	-	-
58615	LAW SCHOOL OUTREACH	1,000	1,000	-	0%	-	-
58620	MINI-CLE EXPENSE	1,500	1,500	-	0%	-	-
TOTAL DIRECT EXPENSES		**13,913**	**13,937**	**24**	**0%**	**3,382**	**4,430**
NET INCOME (LOSS):		**(8,268)**	**(8,550)**	**(282)**	**3%**	**1,531**	**1,758**
NEW FUND BALANCE:		**49,363**	**40,813**	**(257)**	**-1%**	**57,631**	**59,388**

Washington State Bar Association
Section Budget Comparison

SADM	ADMINISTRATIVE LAW SECTION	FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
40500	INTEREST - INVESTMENTS	230	456	226	98%	278	-
40800	PUBLICATIONS REVENUE	2,000	1,500	(500)	-25%	1,923	1,029
41805	MINI-CLE REVENUE	4,750	3,000	(1,750)	-37%	5,790	1,130
48200	SECTION DUES REVENUE	7,500	7,500	-	0%	7,048	9,189
TOTAL REVENUE		**40,730**	**12,456**	**(2,024)**	**-5%**	**15,039**	**11,348**
58175	AWARDS	400	200	(200)	-50%	188	187
58325	LDSHIP/PROF DEVELOP/RETREATS	10,000	11,000	1,000	10%	285	5,374
58350	MEMBERSHIP & RECRUITING EXP	125	125	-	0%	-	-
58375	NEWSLETTER/PUBLICATION EXPENSE	1,200	1,200	-	0%	829	-
58400	PER MEMBER CHARGE	4,415	4,616	201	5%	4,387	5,489
58450	RECEPTION/FORUM EXPENSE	1,000	1,500	500	50%	390	1,150
58620	MINI-CLE EXPENSE	1,000	1,500	500	50%	448	1,192
TOTAL DIRECT EXPENSES		**18,140**	**20,141**	**2,001**	**11%**	**6,526**	**13,394**
NET INCOME (LOSS):		**22,590**	**(7,685)**	**(4,025)**	**-18%**	**8,513**	**(2,046)**
NEW FUND BALANCE:		**42,710**	**35,025**	**(2,024)**	**-5%**	**46,370**	**44,324**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SANIM	**ANIMAL LAW SECTION**							
	40500	INTEREST - INVESTMENTS	120	100	(20)	-16%	67	-
	41805	MINI-CLE REVENUE	260	250	(10)	-4%	-	-
	41875	SEMINAR SPLITS W/ OTHERS	100	-	(100)	-100%	-	-
	48200	SECTION DUES REVENUE	2,225	1,975	(250)	-11%	2,047	2,607
	TOTAL REVENUE		**2,705**	**2,325**	**(380)**	**-14%**	**2,114**	**2,607**
	58300	EXECUTIVE COMMITTEE EXPENSES	570	570	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	960	960	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	10	10	-	0%	-	-
	58400	PER MEMBER CHARGE	1,572	1,459	(113)	-7%	1,528	1,869
	58620	MINI-CLE EXPENSE	970	390	(580)	-60%	-	-
	TOTAL DIRECT EXPENSES		**4,082**	**3,389**	**(693)**	**-17%**	**1,528**	**1,869**
	NET INCOME (LOSS):		**(1,377)**	**(1,063)**	**314**	**-23%**	**587**	**738**
	NEW FUND BALANCE:		**9,107**	**8,044**	**(380)**	**-4%**	**10,484**	**11,222**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SBUS	**BUSINESS LAW SECTION**							
	40500	INTEREST - INVESTMENTS	470	527	57	12%	350	-
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		(800)	
	41805	MINI-CLE REVENUE	1,580	1,900	320	20%	1,645	1,940
	41850	SEMINAR SPLITS W/ CLE	1,150	1,500	350	30%	3,854	-
	48200	SECTION DUES REVENUE	30,825	30,750	(75)	0%	29,198	39,058
	TOTAL REVENUE		**34,025**	**34,677**	**652**	**2%**	**34,247**	**40,998**
	50165	CONFERENCE CALLS	210	-	(210)	-100%	-	-
	58125	ANNUAL OR OTHER MEETING EXPENS	1,000	1,000	-	0%	-	-
	58150	ATTENDANCE AT BOG MEETINGS	300	-	(300)	-100%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	500	-	(500)	-100%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	900	900	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	1,000	1,000	-	0%	351	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	2,000	2,000	-	0%	244	-
	58400	PER MEMBER CHARGE	21,775	22,709	934	4%	21,879	28,008
	58450	RECEPTION/FORUM EXPENSE	900	1,500	600	67%	-	-
	58500	NEW LAWYER OUTREACH	1,500	1,500	-	0%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	6,000	6,000	-	0%	3,000	-
	58550	SECTION COMMITTEE EXPENSE	2,500	2,500	-	0%	-	-
	58620	MINI-CLE EXPENSE	2,800	3,000	200	7%	2,384	5,753
	58625	SEMINAR EXPENSE - SECTIONS	2,000	2,500	500	25%	-	-
	TOTAL DIRECT EXPENSES		**43,385**	**44,609**	**1,224**	**3%**	**27,857**	**33,761**
	NET INCOME (LOSS):		**(9,360)**	**(9,932)**	**(572)**	**-1%**	**6,391**	**7,237**
	NEW FUND BALANCE:		**46,782**	**36,850**	**652**	**2%**	**56,142**	**63,379**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SCAN	**LIQUOR, CANNABIS, AND PSYCHEDELICS SECTION**							
	40500	INTEREST - INVESTMENTS	20	39	19	95%	22	-
	41805	MINI-CLE REVENUE	250	1,000	750	300%	-	630
	48200	SECTION DUES REVENUE	1,750	2,125	375	21%	1,777	2,392
	TOTAL REVENUE		**2,020**	**3,164**	**1,144**	**57%**	**1,799**	**3,022**
	58300	EXECUTIVE COMMITTEE EXPENSES	-	500	500		-	-
	58350	MEMBERSHIP & RECRUITING EXP	50	500	450	900%	-	-
	58400	PER MEMBER CHARGE	1,236	1,569	333	27%	1,323	1,712
	58620	MINI-CLE EXPENSE	225	500	275	122%	37	12
	TOTAL DIRECT EXPENSES		**1,511**	**3,069**	**1,558**	**103%**	**1,360**	**1,724**
	NET INCOME (LOSS):		**509**	**95**	**(414)**	**-81%**	**439**	**1,298**
	NEW FUND BALANCE:		**4,062**	**4,156**	**1,144**	**28%**	**3,553**	**4,850**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SCD	**CREDITOR DEBTOR RIGHTS SECTION**							
	40500	INTEREST - INVESTMENTS	330	403	73	22%	218	-
	41850	SEMINAR SPLITS W/ CLE	2,400	2,800	400	17%	9,436	-
	48200	SECTION DUES REVENUE	15,960	13,590	(2,370)	-15%	13,118	19,953
	TOTAL REVENUE		**18,690**	**16,793**	**(1,897)**	**-10%**	**22,771**	**19,953**
	50165	CONFERENCE CALLS	-	-	-		28	-
	58125	ANNUAL OR OTHER MEETING EXPENS	140	-	(140)	-100%	-	-
	58175	AWARDS	360	350	(10)	-3%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	340	1,000	660	194%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	210	300	90	43%	729	-
	58400	PER MEMBER CHARGE	8,053	8,364	311	4%	8,191	10,607
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	5,000	-	0%	5,000	5,000
	TOTAL DIRECT EXPENSES		**14,103**	**15,014**	**911**	**6%**	**13,948**	**15,607**
	NET INCOME (LOSS):		**4,587**	**1,779**	**(2,808)**	**-61%**	**8,823**	**4,346**
	NEW FUND BALANCE:		**8,140**	**5,841**	**(1,897)**	**-23%**	**37,070**	**41,415**

Washington State Bar Association
Section Budget Comparison

SCON			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
	CONSTRUCTION LAW SECTION							
	40500	INTEREST - INVESTMENTS	440	572	132	30%	344	-
	41805	MINI-CLE REVENUE	1,800	-	(1,800)	-100%	-	-
	41875	SEMINAR SPLITS W/ OTHERS	10,580	6,000	(4,580)	-43%	12,331	-
	48200	SECTION DUES REVENUE	12,350	12,156	(194)	-2%	11,817	16,014
	TOTAL REVENUE		**25,170**	**18,729**	**(6,441)**	**-26%**	**24,492**	**16,014**
	50165	CONFERENCE CALLS	-	-	-		-	1
	58175	AWARDS	1,000	500	(500)	-50%	-	204
	58300	EXECUTIVE COMMITTEE EXPENSES	2,370	1,000	(1,370)	-58%	205	-
	58315	HONORARIUM	-	500	500		750	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	1,860	2,500	640	34%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	-	500	500		-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	3,000	800	(2,200)	-73%	531	446
	58400	PER MEMBER CHARGE	8,724	8,980	256	3%	8,850	11,480
	58450	RECEPTION/FORUM EXPENSE	8,000	8,000	-	0%	2,646	3,350
	58525	SCHOLARSHIPS/DONATIONS/GRANT	80	5,000	4,920	6150%	-	-
	58600	SECTION SPECIAL PROJECTS	2,000	1,000	(1,000)	-50%	-	-
	58620	MINI-CLE EXPENSE	1,800	1,800	-	0%	-	-
	58625	SEMINAR EXPENSE - SECTIONS	314	1,000	686	218%	-	-
	TOTAL DIRECT EXPENSES		**29,148**	**31,580**	**2,432**	**8%**	**12,982**	**15,481**
	NET INCOME (LOSS):		**(3,978)**	**(12,852)**	**(8,874)**	**223%**	**11,510**	**533**
	NEW FUND BALANCE:		**53,940**	**41,089**	**(6,441)**	**-12%**	**57,918**	**58,452**

Washington State Bar Association
Section Budget Comparison

SCRIM CRIMINAL LAW SECTION

		FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
40500	INTEREST - INVESTMENTS	820	801	(19)	-2%	545	-
41850	SEMINAR SPLITS W/ CLE	7,000	7,000	-	0%	13,542	-
41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		(2,700)	-
48200	SECTION DUES REVENUE	11,220	11,010	(210)	-2%	10,430	13,827
TOTAL REVENUE		**19,040**	**18,811**	**(229)**	**-1%**	**21,817**	**13,827**
50165	CONFERENCE CALLS	100	150	50	50%	-	-
58125	ANNUAL OR OTHER MEETING EXPENS	5,500	5,500	-	0%	-	-
58300	EXECUTIVE COMMITTEE EXPENSES	5,000	1,500	(3,500)	-70%	-	649
58305	EXECUTIVE COMM EXP - OTHER	550	1,000	450	82%	-	-
58325	LDSHIP/PROF DEVELOP/RETREATS	4,130	3,500	(630)	-15%	-	-
58350	MEMBERSHIP & RECRUITING EXP	500	1,000	500	100%	-	-
58400	PER MEMBER CHARGE	6,605	6,776	171	3%	6,524	8,267
58450	RECEPTION/FORUM EXPENSE	2,500	2,500	-	0%	-	-
58500	NEW LAWYER OUTREACH	500	500	-	0%	-	-
58525	SCHOLARSHIPS/DONATIONS/GRANT	4,000	4,000	-	0%	-	-
58615	LAW SCHOOL OUTREACH	500	500	-	0%	-	-
58620	MINI-CLE EXPENSE	2,000	500	(1,500)	-75%	-	-
58625	SEMINAR EXPENSE - SECTIONS	11,000	7,500	(3,500)	-32%	-	-
58675	WEBSITE EXPENSES	-	500	500		-	-
TOTAL DIRECT EXPENSES		**42,885**	**35,426**	**(7,459)**	**-17%**	**6,524**	**8,916**
NET INCOME (LOSS):		**(23,845)**	**(16,615)**	**7,230**	**-30%**	**15,293**	**4,911**
NEW FUND BALANCE:		**66,332**	**49,717**	**(229)**	**0%**	**90,177**	**95,087**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SCRL	**CIVIL RIGHTS LAW SECTION**							
	40500	INTEREST - INVESTMENTS	120	141	21	17%	89	-
	41805	MINI-CLE REVENUE	1,500	1,020	(480)	-32%	-	-
	41850	SEMINAR SPLITS W/ CLE	875	200	(675)	-77%	2,280	-
	48200	SECTION DUES REVENUE	5,220	11,010	5,790	111%	4,975	6,788
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		(400)	-
	TOTAL REVENUE		**7,715**	**12,371**	**4,656**	**60%**	**6,945**	**6,788**
	50165	CONFERENCE CALLS	240	170	(70)	-29%	-	-
	58175	AWARDS	310	610	300	97%	581	-
	58300	EXECUTIVE COMMITTEE EXPENSES	750	-	(750)	-100%	-	-
	58315	HONORARIUM	500	410	(90)	-18%	500	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	1,500	1,550	50	3%	1,675	-
	58350	MEMBERSHIP & RECRUITING EXP	30	-	(30)	-100%	-	-
	58400	PER MEMBER CHARGE	3,073	6,776	3,703	120%	3,105	4,055
	58450	RECEPTION/FORUM EXPENSE	760	620	(140)	-18%	-	-
	58615	LAW SCHOOL OUTREACH	500	210	(290)	-58%	-	-
	58620	MINI-CLE EXPENSE	500	80	(420)	-84%	99	-
	TOTAL DIRECT EXPENSES		**8,163**	**10,426**	**2,263**	**28%**	**5,960**	**4,055**
	NET INCOME (LOSS):		**(448)**	**1,945**	**2,393**	**-534%**	**985**	**2,734**
	NEW FUND BALANCE:		**13,526**	**15,471**	**4,656**	**34%**	**13,974**	**16,708**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SCORP	**CORPORATE COUNSEL SECTION**							
	40500	INTEREST - INVESTMENTS	480	655	175	36%	365	-
	41805	MINI-CLE REVENUE	8,000	8,000	-	0%	-	-
	41850	SEMINAR SPLITS W/ CLE	6,850	5,850	(1,000)	-15%	18,041	-
	41875	SEMINAR SPLITS W/ OTHERS	3,620	4,000	380	10%	-	-
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		(5,345)	-
	48200	SECTION DUES REVENUE	21,250	24,000	2,750	13%	20,561	27,394
	TOTAL REVENUE		**40,200**	**42,505**	**2,305**	**6%**	**33,621**	**27,394**
	50165	CONFERENCE CALLS	75	-	(75)	-100%	-	-
	58175	AWARDS	200	200	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	500	500	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	500	500	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	1,000	1,000	-	0%	500	-
	58400	PER MEMBER CHARGE	19,002	22,857	3,855	20%	19,273	24,561
	58450	RECEPTION/FORUM EXPENSE	-	500	500		500	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	5,000	-	0%	1,000	-
	58620	MINI-CLE EXPENSE	8,750	8,750	-	0%	-	-
	58625	SEMINAR EXPENSE - SECTIONS	-	500	500		-	-
	TOTAL DIRECT EXPENSES		**35,027**	**39,807**	**4,780**	**14%**	**21,273**	**24,561**
	NET INCOME (LOSS):		**5,173**	**2,698**	**(2,475)**	**-48%**	**12,349**	**2,833**
	NEW FUND BALANCE:		**66,583**	**69,281**	**2,305**	**3%**	**61,410**	**64,242**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SDR	**DISPUTE RESOLUTION SECTION**							
	40500	INTEREST - INVESTMENTS	390	389	(1)	0%	270	-
	41700	CONFERENCES & INSTITUTES	5,000	38,000	33,000	660%	3,632	-
	41805	MINI-CLE REVENUE	360	360	-	0%	-	-
	48200	SECTION DUES REVENUE	11,165	11,165	-	0%	10,539	13,348
	TOTAL REVENUE		**16,915**	**49,914**	**32,999**	**195%**	**14,441**	**13,348**
	50165	CONFERENCE CALLS	150	110	(40)	-27%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	1,000	950	(50)	-5%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	5,500	6,000	500	9%	5,029	-
	58350	MEMBERSHIP & RECRUITING EXP	1,500	1,500	-	0%	-	-
	58400	PER MEMBER CHARGE	5,634	5,890	256	5%	5,640	6,842
	58525	SCHOLARSHIPS/DONATIONS/GRANT	570	-	(570)	-100%	-	-
	58600	SECTION SPECIAL PROJECTS	-	220	220		-	-
	58620	MINI-CLE EXPENSE	2,000	2,000	-	0%	-	112
	58625	SEMINAR EXPENSE - SECTIONS	-	42,000	42,000		9,526	-
	58675	WEBSITE EXPENSES	250	250	-	0%	240	100
	TOTAL DIRECT EXPENSES		**16,604**	**58,920**	**42,316**	**255%**	**20,434**	**7,054**
	NET INCOME (LOSS):		**311**	**(9,006)**	**(9,317)**	**-2996%**	**(5,994)**	**6,294**
	NEW FUND BALANCE:		**38,151**	**29,145**	**32,999**	**86%**	**37,840**	**44,134**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SELD	**ELDER LAW SECTION**							
	40500	INTEREST - INVESTMENTS	770	1,136	366	47%	666	-
	41850	SEMINAR SPLITS W/ CLE	20,300	5,625	(14,675)	-72%	27,734	-
	48200	SECTION DUES REVENUE	20,895	21,385	490	2%	20,292	27,677
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		(10,400)	-
	TOTAL REVENUE		**41,965**	**28,146**	**(13,819)**	**-33%**	**38,292**	**27,677**
	50165	CONFERENCE CALLS	360	170	(190)	-53%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	1,500	1,500	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	5,000	5,000	-	0%	288	222
	58326	LEGISLATIVE/LOBBYING	1,500	1,500	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	100	100	-	0%	-	-
	58400	PER MEMBER CHARGE	10,543	11,281	738	7%	10,849	14,168
	58450	RECEPTION/FORUM EXPENSE	3,000	3,000	-	0%	-	1,312
	58525	SCHOLARSHIPS/DONATIONS/GRANT	15,000	15,000	-	0%	8,000	-
	58600	SECTION SPECIAL PROJECTS	2,500	2,500	-	0%	-	300
	58625	SEMINAR EXPENSE - SECTIONS	1,500	1,500	-	0%	-	-
	TOTAL DIRECT EXPENSES		**41,003**	**41,551**	**548**	**1%**	**19,137**	**16,002**
	NET INCOME (LOSS):		**962**	**(13,405)**	**(14,367)**	**-1493%**	**19,155**	**11,674**
	NEW FUND BALANCE:		**111,427**	**98,022**	**(13,819)**	**-12%**	**110,465**	**122,139**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SELU	**ENVIRONMENTAL & LAND USE LAW SECTION**							
	40500	INTEREST - INVESTMENTS	290	645	355	122%	385	-
	41800	SEMINAR REGISTRATIONS	1,450	-	(1,450)	-100%	-	-
	41805	MINI-CLE REVENUE	1,050	1,500	450	43%	3,875	1,605
	41850	SEMINAR SPLITS W/ CLE	2,975	6,000	3,025	102%	21,419	-
	48200	SECTION DUES REVENUE	30,520	30,000	(520)	-2%	28,740	39,238
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		(7,580)	-
	TOTAL REVENUE		**36,285**	**38,145**	**1,860**	**5%**	**46,839**	**40,843**
	50165	CONFERENCE CALLS	150	175	25	17%	124	165
	58175	AWARDS	2,500	2,000	(500)	-20%	-	-
	58200	BREAKFAST/LUNCH/DINNER MTG EXP	300	500	200	67%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	10,000	15,000	5,000	50%	492	6,394
	58305	EXECUTIVE COMM EXP - OTHER	500	500	-	0%	7,246	-
	58400	PER MEMBER CHARGE	13,475	13,847	372	3%	13,458	17,580
	58525	SCHOLARSHIPS/DONATIONS/GRANT	6,000	9,000	3,000	50%	11,000	-
	58600	SECTION SPECIAL PROJECTS	500	-	(500)	-100%	-	-
	58615	LAW SCHOOL OUTREACH	1,000	2,000	1,000	100%	891	1,152
	58620	MINI-CLE EXPENSE	2,000	5,500	3,500	175%	336	112
	58625	SEMINAR EXPENSE - SECTIONS	1,500	1,500	-	0%	-	-
	58675	WEBSITE EXPENSES	130	130	-	0%	126	123
	58750	SEMINAR SCHOLARSHIPS	2,000	2,000	-	0%	-	2,000
	TOTAL DIRECT EXPENSES		**40,055**	**52,152**	**12,097**	**30%**	**33,673**	**27,526**
	NET INCOME (LOSS):		**(3,770)**	**(14,007)**	**(10,237)**	**272%**	**13,166**	**13,316**
	NEW FUND BALANCE:		**61,097**	**47,090**	**1,860**	**3%**	**64,867**	**78,184**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SFAM	**FAMILY LAW SECTION**							
	40500	INTEREST - INVESTMENTS	850	1,701	851	100%	1,040	-
	41850	SEMINAR SPLITS W/ CLE	10,600	26,050	15,450	146%	42,318	-
	48200	SECTION DUES REVENUE	34,230	34,125	(105)	0%	32,794	44,339
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		(15,550)	-
	TOTAL REVENUE		**45,680**	**61,876**	**16,196**	**35%**	**60,603**	**44,339**
	50165	CONFERENCE CALLS	240	200	(40)	-17%	-	-
	58125	ANNUAL OR OTHER MEETING EXPENS	1,500	1,500	-	0%	150	-
	58150	ATTENDANCE AT BOG MEETINGS	1,360	1,350	(10)	-1%	593	-
	58175	AWARDS	2,000	2,000	-	0%	276	-
	58300	EXECUTIVE COMMITTEE EXPENSES	16,000	16,000	-	0%	-	272
	58305	EXECUTIVE COMM EXP - OTHER	10,000	10,000	-	0%	3,120	-
	58350	MEMBERSHIP & RECRUITING EXP	1,000	1,000	-	0%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	-	2,000	2,000		-	-
	58400	PER MEMBER CHARGE	17,271	18,001	730	4%	17,562	22,710
	58450	RECEPTION/FORUM EXPENSE	910	1,000	90	10%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	15,000	15,000	-	0%	-	-
	58620	MINI-CLE EXPENSE	-	2,000	2,000		-	-
	58625	SEMINAR EXPENSE - SECTIONS	2,000	3,000	1,000	50%	-	1,529
	TOTAL DIRECT EXPENSES		**67,281**	**73,051**	**5,770**	**9%**	**21,702**	**24,511**
	NET INCOME (LOSS):		**(21,601)**	**(11,175)**	**10,426**	**-48%**	**38,901**	**19,828**
	NEW FUND BALANCE:		**155,385**	**144,210**	**16,196**	**10%**	**176,986**	**196,814**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SHEA	**HEALTH LAW SECTION**							
	40500	INTEREST - INVESTMENTS	770	449	(321)	-42%	474	-
	41805	MINI-CLE REVENUE	600	-	(600)	-100%	1,060	-
	41850	SEMINAR SPLITS W/ CLE	500	4,200	3,700	740%	3,979	-
	48200	SECTION DUES REVENUE	7,780	7,780	-	0%	7,365	9,855
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		(350)	-
	TOTAL REVENUE		**9,650**	**12,429**	**2,779**	**29%**	**12,528**	**9,855**
	50070	PRINTING & COPYING	1,000	-	(1,000)	-100%	-	-
	50165	CONFERENCE CALLS	500	-	(500)	-100%	500	-
	58125	ANNUAL OR OTHER MEETING EXPENS	5,000	-	(5,000)	-100%	-	-
	58175	AWARDS	2,000	-	(2,000)	-100%	-	-
	58200	BREAKFAST/LUNCH/DINNER MTG EXP	1,500	-	(1,500)	-100%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	5,000	2,500	(2,500)	-50%	-	-
	58305	EXECUTIVE COMM EXP - OTHER	2,500	2,500	-	0%	139	-
	58315	HONORARIUM	5,000	3,000	(2,000)	-40%	860	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	5,000	4,000	(1,000)	-20%	-	562
	58350	MEMBERSHIP & RECRUITING EXP	5,000	6,000	1,000	20%	1,926	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	500	-	(500)	-100%	-	-
	58400	PER MEMBER CHARGE	6,870	7,182	312	5%	6,891	8,831
	58450	RECEPTION/FORUM EXPENSE	1,500	-	(1,500)	-100%	-	-
	58500	NEW LAWYER OUTREACH	1,500	-	(1,500)	-100%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	1,500	3,500	2,000	133%	-	1,479
	58550	SECTION COMMITTEE EXPENSE	500	-	(500)	-100%	-	-
	58600	SECTION SPECIAL PROJECTS	1,500	-	(1,500)	-100%	-	-
	58615	LAW SCHOOL OUTREACH	3,500	-	(3,500)	-100%	-	1,225
	58620	MINI-CLE EXPENSE	1,200	1,500	300	25%	112	-
	58625	SEMINAR EXPENSE - SECTIONS	15,000	15,000	-	0%	-	-
	58750	SEMINAR SCHOLARSHIPS	1,500	2,500	1,000	67%	-	-
	TOTAL DIRECT EXPENSES		**67,570**	**47,682**	**(19,888)**	**-29%**	**10,428**	**12,097**
	NET INCOME (LOSS):		**(57,920)**	**(35,253)**	**22,667**	**58%**	**2,100**	**(2,242)**
	NEW FUND BALANCE:		**14,918**	**(20,335)**	**2,779**	**29%**	**72,838**	**70,596**

Washington State Bar Association
Section Budget Comparison

SRPPT	REAL PROPERTY, PROBATE & TRUST SECTION	FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
40500	INTEREST - INVESTMENTS	650	-	(650)	-100%	1,265	-
41850	SEMINAR SPLITS W/ CLE	44,745	-	(44,745)	-100%	137,661	-
48200	SECTION DUES REVENUE	56,650	-	(56,650)	-100%	53,839	73,321
41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		(38,140)	-
TOTAL REVENUE		**102,045**	**-**	**(102,045)**	**-100%**	**154,625**	**73,321**
50165	CONFERENCE CALLS	200	-	(200)	-100%	165	165
58300	EXECUTIVE COMMITTEE EXPENSES	10,000	-	(10,000)	-100%	-	-
58305	EXECUTIVE COMM EXP - OTHER	23,000	-	(23,000)	-100%	13,031	
58325	LDSHIP/PROF DEVELOP/RETREATS	30,000	-	(30,000)	-100%	16,548	10,912
58350	MEMBERSHIP & RECRUITING EXP	1,000	-	(1,000)	-100%	-	-
58375	NEWSLETTER/PUBLICATION EXPENSE	2,000	-	(2,000)	-100%	-	680
58400	PER MEMBER CHARGE	40,018	-	(40,018)	-100%	40,358	52,569
58500	NEW LAWYER OUTREACH	1,500	-	(1,500)	-100%	1,000	316
58525	SCHOLARSHIPS/DONATIONS/GRANT	8,000	-	(8,000)	-100%	1,000	-
58615	LAW SCHOOL OUTREACH	1,000	-	(1,000)	-100%	-	316
58625	SEMINAR EXPENSE - SECTIONS	1,180	-	(1,180)	-100%	6,000	-
58675	WEBSITE EXPENSES	4,040	-	(4,040)	-100%	2,850	2,963
TOTAL DIRECT EXPENSES		**121,938**	**-**	**(121,938)**	**-100%**	**80,952**	**67,922**
NET INCOME (LOSS):		**(19,893)**	**-**	**19,893**	**-100%**	**73,673**	**5,399**
NEW FUND BALANCE:		**208,421**	**-**	**(102,045)**	**-49%**	**228,314**	**233,714**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SIND	**INDIAN LAW SECTION**							
	40500	INTEREST - INVESTMENTS	680	669	(11)	-2%	399	-
	41850	SEMINAR SPLITS W/ CLE	2,200	1,750	(450)	-20%	8,366	-
	41875	SEMINAR SPLITS W/ OTHERS	-	-	-		20,785	-
	48200	SECTION DUES REVENUE	9,600	9,600	-	0%	9,290	12,924
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		(2,750)	-
	TOTAL REVENUE		**12,480**	**12,019**	**(461)**	**-4%**	**36,090**	**12,924**
	58300	EXECUTIVE COMMITTEE EXPENSES	400	400	-	0%	133	-
	58315	HONORARIUM	500	600	100	20%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	800	1,600	800	100%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	1,250	1,250	-	0%	-	-
	58400	PER MEMBER CHARGE	5,651	5,908	257	5%	5,801	7,719
	58450	RECEPTION/FORUM EXPENSE	2,000	4,000	2,000	100%	-	1,803
	58525	SCHOLARSHIPS/DONATIONS/GRANT	10,000	20,000	10,000	100%	10,000	9,194
	58625	SEMINAR EXPENSE - SECTIONS	2,000	-	(2,000)	-100%	-	-
	TOTAL DIRECT EXPENSES		**22,601**	**33,758**	**11,157**	**49%**	**15,934**	**18,715**
	NET INCOME (LOSS):		**(10,121)**	**(21,739)**	**(11,618)**	**115%**	**20,157**	**(5,791)**
	NEW FUND BALANCE:		**60,331**	**38,592**	**(461)**	**-1%**	**70,452**	**64,661**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SINTL	**INTERNATIONAL PRACTICE SECTION**							
	40500	INTEREST - INVESTMENTS	270	387	117	43%	230	-
	41450	SPONSORSHIPS	2,000	2,000	-	0%	2,000	-
	41805	MINI-CLE REVENUE	2,000	2,750	750	38%	5,059	2,625
	48200	SECTION DUES REVENUE	8,435	8,156	(279)	-3%	9,048	11,391
	TOTAL REVENUE		**12,705**	**13,293**	**588**	**5%**	**16,337**	**14,016**
	50165	CONFERENCE CALLS	200	200	-	0%	198	-
	58125	ANNUAL OR OTHER MEETING EXPENS	5,000	5,000	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	500	250	(250)	-50%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	500	250	(250)	-50%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	50	-	(50)	-100%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	500	500	-	0%	-	-
	58400	PER MEMBER CHARGE	4,256	4,154	(102)	-2%	4,233	5,632
	58450	RECEPTION/FORUM EXPENSE	-	2,000	2,000		3,015	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	1,360	1,000	(360)	-26%	1,000	-
	58620	MINI-CLE EXPENSE	1,500	1,200	(300)	-20%	932	646
	58675	WEBSITE EXPENSES	-	-	-		32	-
	TOTAL DIRECT EXPENSES		**13,866**	**14,554**	**688**	**5%**	**9,410**	**6,278**
	NET INCOME (LOSS):		**(1,161)**	**(1,261)**	**(100)**	**9%**	**6,927**	**7,738**
	NEW FUND BALANCE:		**37,186**	**35,925**	**588**	**2%**	**38,347**	**46,086**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SIP	**INTELLECTUAL PROPERTY LAW SECTION**							
	40500	INTEREST - INVESTMENTS	900	1,053	153	17%	664	-
	41805	MINI-CLE REVENUE	1,240	700	(540)	-44%	1,295	105
	41850	SEMINAR SPLITS W/ CLE	7,900	19,100	11,200	142%	19,600	-
	48200	SECTION DUES REVENUE	21,375	20,250	(1,125)	-5%	20,100	27,000
	41855		-	-	-		(4,900)	-
	TOTAL REVENUE		**31,415**	**41,103**	**9,688**	**31%**	**36,758**	**27,105**
	58175	AWARDS	50	-	(50)	-100%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	2,000	1,000	(1,000)	-50%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	-	500	500		-	-
	58350	MEMBERSHIP & RECRUITING EXP	2,780	2,000	(780)	-28%	-	-
	58400	PER MEMBER CHARGE	15,099	14,955	(144)	-1%	15,067	19,362
	58450	RECEPTION/FORUM EXPENSE	3,750	2,000	(1,750)	-47%	-	6,188
	58525	SCHOLARSHIPS/DONATIONS/GRANT	12,000	15,000	3,000	25%	-	15,000
	58600	SECTION SPECIAL PROJECTS	-	2,000	2,000		-	-
	58615	LAW SCHOOL OUTREACH	1,000	500	(500)	-50%	-	-
	58620	MINI-CLE EXPENSE	1,500	3,000	1,500	100%	112	108
	58625	SEMINAR EXPENSE - SECTIONS	9,500	6,500	(3,000)	-32%	537	141
	TOTAL DIRECT EXPENSES		**47,679**	**47,455**	**(224)**	**0%**	**15,716**	**40,799**
	NET INCOME (LOSS):		**(16,264)**	**(6,352)**	**9,912**	**-61%**	**21,042**	**(13,694)**
	NEW FUND BALANCE:		**94,753**	**88,401**	**9,688**	**10%**	**111,017**	**97,322**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SJUV	**JUVENILE LAW SECTION**							
	40500	INTEREST - INVESTMENTS	120	116	(4)	-3%	86	-
	41805	MINI-CLE REVENUE	-	-	-		1,120	-
	48200	SECTION DUES REVENUE	4,830	4,655	(175)	-4%	4,536	6,062
	TOTAL REVENUE		**4,950**	**4,771**	**(179)**	**-4%**	**5,741**	**6,062**
	50165	CONFERENCE CALLS	150	150	-	0%	150	163
	58300	EXECUTIVE COMMITTEE EXPENSES	500	760	260	52%	-	-
	58315	HONORARIUM	2,000	2,000	-	0%	1,000	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	1,500	3,000	1,500	100%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	250	250	-	0%	-	-
	58400	PER MEMBER CHARGE	2,437	2,456	19	1%	2,429	3,105
	58525	SCHOLARSHIPS/DONATIONS/GRANT	2,060	3,000	940	46%	-	1,500
	58620	MINI-CLE EXPENSE	500	400	(100)	-20%	224	-
	58625	SEMINAR EXPENSE - SECTIONS	800	1,180	380	48%	-	-
	TOTAL DIRECT EXPENSES		**10,197**	**13,196**	**2,999**	**29%**	**3,803**	**4,769**
	NET INCOME (LOSS):		**(5,247)**	**(8,425)**	**(3,178)**	**61%**	**1,939**	**1,293**
	NEW FUND BALANCE:		**8,716**	**291**	**(179)**	**-2%**	**13,963**	**15,256**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SLAMP	**LEGAL ASSISTANCE TO MILITARY PERSONNEL SECTION**							
	40500	INTEREST - INVESTMENTS	190	202	12	6%	129	-
	41805	MINI-CLE REVENUE	130	320	190	146%	710	-
	48200	SECTION DUES REVENUE	2,800	2,625	(175)	-6%	2,566	3,480
	TOTAL REVENUE		**3,120**	**3,147**	**27**	**1%**	**3,405**	**3,480**
	50165	CONFERENCE CALLS	200	10	(190)	-95%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	50	70	20	40%	144	-
	58350	MEMBERSHIP & RECRUITING EXP	30	-	(30)	-100%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	100	-	(100)	-100%	-	-
	58400	PER MEMBER CHARGE	1,413	1,385	(28)	-2%	1,367	1,780
	58525	SCHOLARSHIPS/DONATIONS/GRANT	2,000	-	(2,000)	-100%	-	-
	58620	MINI-CLE EXPENSE	500	310	(190)	-38%	386	-
	TOTAL DIRECT EXPENSES		**4,293**	**1,775**	**(2,518)**	**-59%**	**1,898**	**1,780**
	NET INCOME (LOSS):		**(1,173)**	**1,372**	**2,545**	**-217%**	**1,508**	**1,700**
	NEW FUND BALANCE:		**19,141**	**20,513**	**27**	**0%**	**20,314**	**22,014**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SLB	**LOW BONO SECTION**							
	40500	INTEREST - INVESTMENTS	70	172	102	145%	111	-
	41805	MINI-CLE REVENUE	3,000	2,200	(800)	-27%	2,170	-
	41875	SEMINAR SPLITS W/ OTHERS	-	1,000	1,000		-	-
	48200	SECTION DUES REVENUE	2,400	2,438	38	2%	2,242	2,757
	TOTAL REVENUE		**5,470**	**5,809**	**339**	**6%**	**4,523**	**2,757**
	50165	CONFERENCE CALLS	140	150	10	7%	-	-
	58125	ANNUAL OR OTHER MEETING EXPENS	300	2,000	1,700	567%	-	-
	58150	ATTENDANCE AT BOG MEETINGS	300	100	(200)	-67%	-	-
	58175	AWARDS	300	-	(300)	-100%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	350	100	(250)	-71%	-	126
	58325	LDSHIP/PROF DEVELOP/RETREATS	1,400	500	(900)	-64%	486	597
	58350	MEMBERSHIP & RECRUITING EXP	200	200	-	0%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	2,000	-	(2,000)	-100%	-	-
	58400	PER MEMBER CHARGE	1,413	1,499	86	6%	1,408	1,652
	58500	NEW LAWYER OUTREACH	200	200	-	0%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	900	200	(700)	-78%	-	-
	58600	SECTION SPECIAL PROJECTS	-	500	500		-	-
	58615	LAW SCHOOL OUTREACH	200	-	(200)	-100%	-	-
	58620	MINI-CLE EXPENSE	224	60	(164)	-73%	112	-
	58625	SEMINAR EXPENSE - SECTIONS	100	100	-	0%	-	-
	55555	SOCIAL MEDIA	-	500	500			
	TOTAL DIRECT EXPENSES		**8,027**	**6,109**	**(1,918)**	**-24%**	**2,006**	**2,376**
	NET INCOME (LOSS):		**(2,557)**	**(300)**	**2,257**	**-88%**	**2,518**	**382**
	NEW FUND BALANCE:		**15,482**	**15,182**	**339**	**2%**	**18,039**	**18,421**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SLE	**LABOR & EMPLOYMENT LAW SECTION**							
	40500	INTEREST - INVESTMENTS	850	913	63	7%	656	-
	41805	MINI-CLE REVENUE	1,390	300	(1,090)	-78%	1,425	1,005
	41850	SEMINAR SPLITS W/ CLE	13,450	20,250	6,800	51%	33,862	-
	48200	SECTION DUES REVENUE	28,860	29,400	540	2%	27,281	38,781
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		(9,145)	-
	TOTAL REVENUE		**44,550**	**50,863**	**6,313**	**14%**	**54,079**	**39,786**
	50070	PRINTING & COPYING	200	200	-	0%	-	-
	50165	CONFERENCE CALLS	180	170	(10)	-6%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	2,000	2,000	-	0%	937	-
	58315	HONORARIUM	1,000	1,000	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	15,000	15,000	-	0%	1,885	7,303
	58400	PER MEMBER CHARGE	16,989	18,093	1,104	6%	17,045	23,158
	58450	RECEPTION/FORUM EXPENSE	3,000	-	(3,000)	-100%	-	(904)
	58525	SCHOLARSHIPS/DONATIONS/GRANT	22,500	22,500	-	0%	22,500	7,500
	58615	LAW SCHOOL OUTREACH	1,000	1,000	-	0%	-	664
	58620	MINI-CLE EXPENSE	8,000	11,000	3,000	38%	1,724	-
	58625	SEMINAR EXPENSE - SECTIONS	5,000	3,000	(2,000)	-40%	-	2,311
	TOTAL DIRECT EXPENSES		**74,869**	**73,963**	**(906)**	**-1%**	**44,090**	**40,032**
	NET INCOME (LOSS):		**(30,319)**	**(23,101)**	**7,218**	**-24%**	**9,989**	**(246)**
	NEW FUND BALANCE:		**74,001**	**50,901**	**6,313**	**9%**	**104,320**	**104,074**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SLGBT	**LGBT LAW SECTION**							
	40500	INTEREST - INVESTMENTS	90	102	12	13%	71	-
	41805	MINI-CLE REVENUE	200	200	-	0%	930	240
	48200	SECTION DUES REVENUE	3,570	3,300	(270)	-8%	3,285	4,083
	TOTAL REVENUE		**3,860**	**3,602**	**(258)**	**-7%**	**4,286**	**4,323**
	50165	CONFERENCE CALLS	110	150	40	36%	150	-
	58125	ANNUAL OR OTHER MEETING EXPENS	200	200	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	200	200	-	0%	-	-
	58315	HONORARIUM	500	500	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	2,000	2,000	-	0%	278	-
	58400	PER MEMBER CHARGE	2,102	2,031	(71)	-3%	2,042	2,439
	58525	SCHOLARSHIPS/DONATIONS/GRANT	200	500	300	150%	-	-
	58615	LAW SCHOOL OUTREACH	-	500	500		-	-
	58620	MINI-CLE EXPENSE	1,500	1,500	-	0%	62	112
	58750	SEMINAR SCHOLARSHIPS	500	500	-	0%	-	-
	TOTAL DIRECT EXPENSES		**7,312**	**8,081**	**769**	**11%**	**2,531**	**2,551**
	NET INCOME (LOSS):		**(3,452)**	**(4,479)**	**(1,027)**	**30%**	**1,755**	**1,771**
	NEW FUND BALANCE:		**8,196**	**3,717**	**(258)**	**-3%**	**11,648**	**13,419**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SLIT	**LITIGATION SECTION**							
	40500	INTEREST - INVESTMENTS	820	1,155	335	41%	689	-
	41850	SEMINAR SPLITS W/ CLE	11,350	6,100	(5,250)	-46%	18,679	-
	48200	SECTION DUES REVENUE	30,660	28,800	(1,860)	-6%	28,661	39,284
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		(3,000)	-
	TOTAL REVENUE		**42,830**	**36,055**	**(6,775)**	**-16%**	**45,029**	**39,284**
	50165	CONFERENCE CALLS	170	170	-	0%	70	18
	58175	AWARDS	1,500	1,500	-	0%	-	-
	58200	BREAKFAST/LUNCH/DINNER MTG EXP	5,500	5,500	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	12,750	12,750	-	0%	464	2,213
	58325	LDSHIP/PROF DEVELOP/RETREATS	420	520	100	24%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	1,000	1,000	-	0%	-	-
	58400	PER MEMBER CHARGE	18,049	17,724	(325)	-2%	17,904	23,469
	58500	NEW LAWYER OUTREACH	600	600	-	0%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	6,000	6,000	-	0%	4,000	-
	58615	LAW SCHOOL OUTREACH	1,500	1,500	-	0%	386	-
	58625	SEMINAR EXPENSE - SECTIONS	750	750	-	0%	-	-
	TOTAL DIRECT EXPENSES		**48,239**	**48,014**	**(225)**	**0%**	**22,824**	**25,700**
	NET INCOME (LOSS):		**(5,409)**	**(11,959)**	**(6,550)**	**121%**	**22,204**	**13,583**
	NEW FUND BALANCE:		**110,092**	**98,133**	**(6,775)**	**-6%**	**115,501**	**129,084**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SSEN	**SENIOR LAWYERS SECTION**							
	40500	INTEREST - INVESTMENTS	90	166	76	84%	95	-
	41805	MINI-CLE REVENUE	2,720	2,850	130	5%	1,645	-
	48200	SECTION DUES REVENUE	5,550	5,781	231	4%	5,372	6,841
	TOTAL REVENUE		**8,360**	**8,797**	**437**	**5%**	**7,112**	**6,841**
	50165	CONFERENCE CALLS	250	150	(100)	-40%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	500	230	(270)	-54%	-	50
	58350	MEMBERSHIP & RECRUITING EXP	-	610	610		-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	1,800	4,000	2,200	122%	1,216	2,850
	58400	PER MEMBER CHARGE	3,921	4,264	343	9%	4,029	4,910
	58620	MINI-CLE EXPENSE	-	-	-		112	-
	TOTAL DIRECT EXPENSES		**6,471**	**9,254**	**2,783**	**43%**	**5,358**	**7,810**
	NET INCOME (LOSS):		**1,889**	**(457)**	**(2,346)**	**-124%**	**1,754**	**(970)**
	NEW FUND BALANCE:		**17,118**	**16,661**	**437**	**3%**	**15,229**	**14,259**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SSSP	**SOLO & SMALL PRACTICE SECTION**							
	40500	INTEREST - INVESTMENTS	900	989	89	10%	639	-
	41805	MINI-CLE REVENUE	5,000	5,000	-	0%	4,805	2,660
	48200	SECTION DUES REVENUE	31,500	31,500	-	0%	29,144	39,272
	TOTAL REVENUE		**37,400**	**37,489**	**89**	**0%**	**34,588**	**41,932**
	50165	CONFERENCE CALLS	190	200	10	5%	199	101
	58150	ATTENDANCE AT BOG MEETINGS	-	100	100		-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	270	300	30	11%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	5,000	5,000	-	0%	1,348	4,078
	58350	MEMBERSHIP & RECRUITING EXP	3,000	5,000	2,000	67%	6,874	400
	58400	PER MEMBER CHARGE	15,894	16,616	722	5%	15,602	20,203
	58525	SCHOLARSHIPS/DONATIONS/GRANT	1,200	-	(1,200)	-100%	-	-
	58600	SECTION SPECIAL PROJECTS	1,500	2,000	500	33%	-	-
	58620	MINI-CLE EXPENSE	2,500	3,000	500	20%	1,222	336
	58625	SEMINAR EXPENSE - SECTIONS	5,000	5,000	-	0%	4,500	-
	58675	WEBSITE EXPENSES	4,000	5,000	1,000	25%	-	111
	58750	SEMINAR SCHOLARSHIPS	2,000	3,000	1,000	50%	1,950	-
	TOTAL DIRECT EXPENSES		**40,554**	**45,216**	**4,662**	**11%**	**31,695**	**25,228**
	NET INCOME (LOSS):		**(3,154)**	**(7,727)**	**(4,573)**	**145%**	**2,894**	**16,704**
	NEW FUND BALANCE:		**95,092**	**87,366**	**89**	**0%**	**98,247**	**114,951**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
STAX	**TAXATION SECTION**							
	40500	INTEREST - INVESTMENTS	560	200	(360)	-64%	257	-
	41500	ANNUAL OR OTHER MEETING REV	2,000	4,500	2,500	125%	-	-
	41805	MINI-CLE REVENUE	360	500	140	39%	835	-
	48200	SECTION DUES REVENUE	12,460	12,460	-	0%	11,696	16,019
	TOTAL REVENUE		**15,380**	**17,660**	**2,280**	**15%**	**12,788**	**16,019**
	50165	CONFERENCE CALLS	100	100	-	0%	-	-
	58125	ANNUAL OR OTHER MEETING EXPENS	10,000	9,000	(1,000)	-10%	-	1,800
	58175	AWARDS	400	400	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	2,000	2,000	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	1,500	1,500	-	0%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	-	1,500	1,500		-	-
	58400	PER MEMBER CHARGE	11,002	11,502	500	5%	10,954	14,353
	58450	RECEPTION/FORUM EXPENSE	4,500	4,500	-	0%	530	1,306
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	9,000	4,000	80%	6,000	-
	58600	SECTION SPECIAL PROJECTS	6,000	6,000	-	0%	3,500	150
	58620	MINI-CLE EXPENSE	500	500	-	0%	236	-
	58625	SEMINAR EXPENSE - SECTIONS	4,000	4,000	-	0%	850	-
	TOTAL DIRECT EXPENSES		**45,002**	**50,002**	**5,000**	**11%**	**22,070**	**17,609**
					-			
	NET INCOME (LOSS):		**(29,622)**	**(32,342)**	**(2,720)**	**9%**	**(9,282)**	**(1,591)**
	NEW FUND BALANCE:		**4,711**	**(27,631)**	**2,280**	**48%**	**34,333**	**32,743**

Washington State Bar Association
Section Budget Comparison

			FY2023 Budget	FY2024 Budget	FY23 vs FY24 Comparison	% Change	FY2022 Actuals YTD	FY2023 Actuals YTD
SWP	**WORLD PEACE THROUGH LAW SECTION**							
	40500	INTEREST - INVESTMENTS	200	228	28	14%	155	-
	41850	SEMINAR SPLITS W/ CLE	875	900	25	3%	2,358	-
	48200	SECTION DUES REVENUE	3,870	3,544	(326)	-8%	3,758	5,063
	TOTAL REVENUE		**4,945**	**4,672**	**(273)**	**-6%**	**6,470**	**5,063**
	50165	CONFERENCE CALLS	10	10	-	0%	-	-
	58175	AWARDS	500	500	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	150	150	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	1,000	1,000	-	0%	-	-
	58400	PER MEMBER CHARGE	2,278	2,492	214	9%	2,348	3,025
	58450	RECEPTION/FORUM EXPENSE	500	500	-	0%	-	-
	58500	NEW LAWYER OUTREACH	-	520	520		-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	3,000	3,000	-	0%	-	250
	58600	SECTION SPECIAL PROJECTS	200	200	-	0%	-	-
	58615	LAW SCHOOL OUTREACH	100	100	-	0%	-	-
	58620	MINI-CLE EXPENSE	1,490	1,880	390	26%	539	938
	58625	SEMINAR EXPENSE - SECTIONS	1,500	1,500	-	0%	-	-
	TOTAL DIRECT EXPENSES		**10,728**	**11,852**	**1,124**	**10%**	**2,887**	**4,213**
					-			
	NET INCOME (LOSS):		**(5,783)**	**(7,180)**	**(1,397)**	**24%**	**3,584**	**849**
	NEW FUND BALANCE:		**19,419**	**12,238**	**(273)**	**-1%**	**25,202**	**26,051**

ATTACHMENT E

WASHINGTON STATE BAR ASSOCIATION

TO: WSBA President, President-elect, Board of Governors, Executive Director

FROM: WSBA World Peace Through Law Section Chair, Chair-Elect, and Secretary/T

SUBJECT: Request for Change in Section Member Dues in 2024

DATE: 07/02/2023

The World Peace Through Law Section requests your approval to change (increase

or decrease) our section member dues from $ $ 30.00 to $ $ 25.00 effective January 1, 2024.

The new amount has been included in our budget for the 2024 fiscal year which begins October 1, 2023.

Reason for request to change dues:

The World Peace Through Law Section reviewed the list of WSBA sections' 2023 dues rates and found that ours was higher than most. We have accrued section funds covering about two years of expenses and, as a way of spending down this balance, would like to reduce our dues rate to better align with what most other sections are charging. This will also hopefully make involvement in our section a bit more accessible to a greater number of WSBA members.

ATTACHMENT F

2024 WSBA BUDGET WORKSHEET
CAPITAL BUDGET

	COST CENTER	UNIT COST	QTY	AMOUNT	USEFUL LIFE (YRS)	ESTIMATED IN SERVICE DATE	ANNUAL DEPRECIATION EXPENSE	BUDGET FY 2024
Capital Software (General Indirects)								
Discipline System (GILDA) replacement	DISC	40,000	1	40,000	5	Jan-24	8,000	6,000
				-				-
Total				**40,000**			**8,000**	**6,000**
Capital Labor (WSBA Developer Resources)								
Law Clerk Database	CLERK	93,510	1	93,510	5	Jul-24	4,675	4,675
MCLE System Enhancements	MCLE	67,370	1	67,370	5	Jan-24	13,474	10,106
Discipline System (GILDA) replacement	DISC	49,120	1	49,120	5	Jan-24	9,824	7,368
Total		**210,000**		**210,000**			**27,974**	**22,149**
Capital Hardware (General Indirects):								
Replacement of network infrastructure hardware	INDIRECT	40,000	1	40,000	5	Oct-23	13,333	13,333
Total				**40,000**			**13,333**	**13,333**
Leasehold Improvements (General Indirects)								
Leasehold Improvements (accessibility)	INDIRECT	50,000	1	50,000	3.25	Oct-23	15,385	15,385
Total				**50,000**			**15,385**	**15,385**
GRAND TOTAL				**340,000**			**64,692**	**56,867**

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors

From: Tiffany Lynch, Director of Finance
Terra Nevitt, Executive Director

cc: Budget and Audit Committee

Re: 2025 License Fees

Date: July 21, 2023

BACKGROUND

Member license fees are established by the Board of Governors and reviewed for reasonableness by the Washington Supreme Court. Since 2012, license fees have been set on an annual basis and on a timeline that allows for the referendum process (if initiated) to be completed prior to the annual licensing renewal season, which runs from November through February. Prior to 2012, license fees were approved in a variety of different lengths ranging from 1 to 4-year increments. The current full active lawyer fee was set at $458 for 2020 and remained unchanged through 2024.

License fees are the primary source of revenue for the General Fund, which supports the majority of WSBA's operations. WSBA has been able to maintain a flat license fee rate for five years by outperforming its budget resulting in net income and not using reserves to the level originally expected. As a result, unrestricted reserve funds have continued to build, which allows WSBA to balance a budget that projects a loss. Below is a 10-year historical look at the General Fund:

Fiscal Year	Budgeted Gain or Loss	Actual	Overall Difference Actual vs. Budget	Unrestricted Reserve Funds Balance[1]
2013	($456,559)	$215,655	$672,214	$3,606,861
2014	($1,928,485)	($1,085,827)	$842,658	$2,625,488
2015	($3,125,741)	($2,679,392)	$446,349	$0
2016	($2,325,568)	($1,183,997)	$1,141,571	$0
2017	($1,997,345)	($554,785)	$1,442,560	$1,663,751
2018	($732,275)	$432,107	$1,164,382	$1,845,858
2019	($101,616)	$940,679	$1,042,295	$2,686,537
2020	($591,915)	$791,697	$1,383,612	$3,478,234
2021	($202,779)	$1,543,940	$1,746,719	$4,522,174
2022	($89,563)	$1,641,094	$1,730,657	$4,013,268

[1] Unrestricted reserve funds are separate from other Board designated general fund reserves including the Operating Reserve ($2.0M) and Facilities Reserve ($2.7M) balances as of July 2023.

WSBA has a conservative budget approach, to account for uncertainty, while ensuring that funds are available to cover the multitude of costs that are needed to deliver programs that promote our mission and serve our members and the public. This approach typically leads to positive variances between budget and actual figures. These variances result from a variety of different sources that change from year to year, however there are some consistent patterns. For example, WSBA has consistently been able to earn higher than budgeted revenue from regulatory fees such as those charged for attorney licensing and mandatory continuing legal education. Those fees are budgeted based on projected membership counts and members who are assessed late fees, both of which are figures that can be difficult to predict. WSBA also has funds invested in fixed income instruments and in prior years it also had equity investments. Any interest income, gain, or loss on investments depends on market conditions and individual investment performance which leads to significant fluctuations each year. On the expense side, WSBA's largest annual expense is for staff (salaries, benefits, and payroll taxes) which starts with an assumption that all positions are filled for the entire year. We account for savings from attrition and vacancies with an offset, however these trends are also difficult to predict. Lastly, direct expenses (those that support program and service delivery) vary greatly depending on the body of work and corresponding predictability of expenses. For example, during the COVID-19 pandemic (FY2020-FY2022) direct expense budgets were developed with assumptions of returning to in-person activities at varying degrees, however the recovery and return to in-person functions has taken much longer to resume than expected and has still not returned to pre-pandemic levels. From FY2013-FY2019, the average direct expense variance from budget was approximately $134,000, compared to an average of $501,000 from FY2020-FY2022.

RECOMMENDATION

We recommend that the Board keep license fees at $458 for 2025 and utilize unrestricted reserves to cover costs, which are anticipated to exceed revenue in FY24.

Since FY2016, WSBA's unrestricted reserve balance has steadily increased due to positive budget variances. This has allowed the Board to maintain a consistent license fee rate for 5 consecutive years, while keeping up with the rising cost of labor, rent, insurance, and general inflation, and adding to our unrestricted reserves. For the current fiscal year (FY23), the General Fund is budgeted to use unrestricted reserves of approximately $562,000, however, similar to historical performance, we do not expect to use unrestricted reserves as budgeted and instead will earn a net income. Unlike in some prior years, this year we have been more accurate in terms of projected license fee revenue and staffing costs, however we continue to see a trend of lower direct costs and have benefited from higher than anticipated interest income on our investments.

When developing a recommendation for 2025 license fees, we considered the impact of the FY24 budget on FY25 and FY26 projections and unrestricted reserve balances. The second draft of the FY24 budget anticipates the use of approximately $985,000 of unrestricted reserves. Presented in the chart below is the projected balance of unrestricted reserves through 2026 with two different scenarios; one assumes actual financial results match the budget and the other includes an annual offset of $600,000 to the projected net income or loss, which takes into account WSBA's history of outperforming the budget. This provides a guide to the possible range of unrestricted reserve balances from the most conservative (meeting budget expectations) to a balance that considers historical performance.

YEAR	REVENUE	EXPENSE	NET INCOME/(LOSS)	UNRESTRICTED RESERVES	NET INCOME/(LOSS) w/$600K	UNRESTRICTED RESERVES w/$600K
FY23 PROJECTION	$22.5M	$21.7M	$800K	$4.8M		
FY24 BUDGET	$22.5M	$23.5M	($985K)	$3.8M	($385K)	$4.4M
FY25 PROJECTION	$22.5M	$24.7M	($2.2M)	$1.6M	($1.65M)	$2.78M
FY26 PROJECTION	$22.8M	$25.7M	($3.0M)	($1.4M)	($2.4M)	$388K

Budgeting a net loss reflects the purposeful use of the WSBA's reserves, which are available and can appropriately be used to offset increased operating costs. It is both prudent and responsible for WSBA to plan to use the unrestricted reserves which have grown over time and based on the projections provided, it is likely that WSBA will have sufficient unrestricted reserves to support maintaining a static license fee for another year. It is for these reasons that we recommend that the Board keep license fees at $458 for 2025.

FUTURE LICENSE FEES

Decisions the Board makes for this year's budget and license fees will impact the level of license fees needed to support the organization and its work in the future. We can expect costs to rise every year. Over the past 12 to 18 months, the inflation rate and cost of labor have increased dramatically. For example, as of April 2023, the Seattle area Consumer Price Index (CPI), which measures the average change over time in the prices paid by urban consumers for consumer goods and services, increased 6.9% from the prior year and 1% over the previous 2 months, whereas inflation rates between 2019-2020 were in the range of 1.5-3%. Seattle (where WSBA is headquartered) has housing and food costs that run much higher than the national average, which impacts our staffing costs and requires the ability to provide market rate compensation packages for our employees.

On the revenue side, historically we have benefited from increased revenue resulting from net increases in membership. Up until 2022, the net increase in membership was somewhat steady, however starting in 2022 and continuing in 2023, that growth has begun to decline. Based on the WSBA's membership demographics, and observing trends around the country, it is expected that at some point there will be a more significant decline in membership as more members exit the profession than the number of new members joining.

As costs continue to rise and revenue remains somewhat flat, WSBA will continue to need to rely on the use of unrestricted reserves to support this gap until those funds have been fully utilized.

Current projections indicate that we could exhaust unrestricted reserves by FY2026 (assuming we use all budgeted funds each year) unless we reduce expenses, increase revenue, or reallocate available funds from other Board designated General Fund reserves. However, there are outstanding factors that could have an impact on the projections, such as a decision regarding the future of WSBA office space.

If and when license fees do increase, we believe it is critical that WSBA provide ample notice, information, and opportunities for engagement with our members.

NEXT STEPS

Below are the procedural steps and timeline for the 2025 license fee:

1. At its August 18, 2023 meeting, the Budget and Audit Committee will vote on its 2025 license fee recommendation to the Board.

2. At the September 8-9, 2023 Board of Governors meeting, the Board will vote on the Committee's recommendation.

3. The Washington Supreme Court will then review the fees set by the Board for reasonableness.

WASHINGTON STATE
BAR ASSOCIATION

Financial Reports

(Unaudited)

Year to Date June 30, 2023

Prepared by
Maggie Yu, Controller

Submitted by
Tiffany Lynch, Director of Finance
July 18, 2023

WASHINGTON STATE BAR ASSOCIATION

To: Board of Governors
Budget and Audit Committee

From: Terra Nevitt, Executive Director; Tiffany Lynch, Director of Finance; Maggie Yu, Controller

Re: Key Financial Benchmarks for the Preliminary Fiscal Year to Date (YTD) through June 30, 2023
As % of Completion to Annual Budget

	% of Year	Current Year % YTD	Current Year $ Difference Favorable/(Unfavorable)	Prior Year YTD	Comments
Total Salaries & Benefits	**75%**	**74%**	**$136,050**	**75%**	**Favorable to budget due to vacant positions.**
Other Indirect Expenses*	**75%**	**68%**	**$315,571**	**73%**	**Favorable to budget due to timing of payments.**
Total Indirect Expenses	**75%**	**73%**	**$451,621**	**74%**	**Favorable to budget resulting from a combination of reasons described above. Expected to be favorable to budget for year.**
General Fund Revenues	**75%**	**80%**	**$1,141,107**	**80%**	**Favorable to budget due to high interest income, product sales, seminar registrations for member services & engagement and new member education, MCLE payments, and timing of bar exam, law clerk fees, and Foundation donation collection. Expected to be favorable to budget.**
General Fund Indirect Expenses	**75%**	**73%**	**$411,470**	**74%**	**Favorable to budget as described under indirect expenses above. Expected to be favorable to budget.**
General Fund Direct Expenses	**75%**	**46%**	**$759,292**	**47%**	**Favorable to budget due to timing of program activities and meetings/events. Expected to be favorable to budget.**
General Fund Net	**75%**	**337%**	**$2,311,868**	**866%**	**Favorable to budget for the reasons described above. Expected to be favorable to budget.**
CLE Revenue	**75%**	**70%**	**($94,112)**	**72%**	**Unfavorable to budget due to less attendees to live seminars and lower sale of deskbook royalties. Expected to remain unfavorable to budget.**
CLE Direct Expenses	**75%**	**34%**	**$154,424**	**30%**	**Favorable to budget due to timing of scheduled seminar expense payments. Expected to be remain favorable through year-end.**
CLE Indirect Expenses	**75%**	**72%**	**$34,781**	**76%**	**Favorable to budget as described under indirect expenses above and expected to remain favorable through year-end.**
CLE Net	**75%**	**119%**	**$95,083**	**87%**	**Favorable to budget for the reasons described above. Expected to be on budget.**

*Workplace benefits, Human Resources, meeting support, rent, taxes, furniture & maintenance, office supplies, depreciation, insurance, equipment, professional fees (legal & audit), internet & telephone, postage, storage, bank fees, Technology

Washington State Bar Association Financial Summary
Compared to Fiscal Year 2023 Budget
For the Period from June 1, 2023 to June 30, 2023

Category	Actual Revenues	Budgeted Revenues	Actual Indirect Expenses	Budgeted Indirect Expenses	Actual Direct Expenses	Budgeted Direct Expenses	Actual Total Expenses	Budgeted Total Expenses	Actual Net Result	Budgeted Net Result
Access to Justice	-	-	174,332	237,082	67,400	121,820	241,733	358,902	(241,733)	(358,902)
Admissions/Bar Exam	1,123,154	1,362,940	656,532	892,773	169,159	414,079	825,690	1,306,852	297,464	56,088
Advancement FTE		-	261,009	354,465	3,004	8,100	264,013	362,565	(264,013)	(362,565)
Bar News	415,751	602,700	244,291	332,507	255,700	363,460	499,991	695,967	(84,239)	(93,267)
Board of Governors	-	-	147,036	191,700	198,922	371,900	345,958	563,600	(345,958)	(563,600)
Character & Fitness Board	-	-	102,164	139,623	1,142	27,000	103,306	166,623	(103,306)	(166,623)
Communications Strategies	1,962	3,500	493,752	674,814	29,525	116,015	523,277	790,829	(521,316)	(787,329)
Communications Strategies FTE		-	180,183	243,400	-	-	180,183	243,400	(180,183)	(243,400)
Discipline	55,903	119,000	4,213,803	6,007,729	92,351	206,999	4,306,154	6,214,728	(4,250,251)	(6,095,728)
Diversity	135,000	135,000	146,875	240,734	35,995	130,035	182,869	370,769	(47,869)	(235,769)
Finance	636,016	26,000	796,812	1,080,720	3,772	6,500	800,584	1,087,220	(164,569)	(1,061,220)
Foundation	-	-	106,851	147,147	3,134	5,650	109,985	152,797	(109,985)	(152,797)
Human Resources	-	-	458,678	424,625	-	-	458,678	424,625	(458,678)	(424,625)
Law Clerk Program	196,633	188,200	99,735	138,099	5,680	8,900	105,415	146,999	91,218	41,201
Legislative	-	-	174,250	242,681	16,831	26,783	191,081	269,464	(191,081)	(269,464)
Legal Lunchbox	30,609	23,000	36,133	51,117	551	1,500	36,684	52,617	(6,075)	(29,617)
Licensing and Membership Records	333,326	452,200	468,210	622,311	22,212	23,651	490,422	645,962	(157,096)	(193,762)
Licensing Fees	12,702,188	17,053,467	-	-	-	-	0	-	12,702,188	17,053,467
Limited License Legal Technician	10,388	29,722	61,270	85,248	3,909	15,500	65,178	100,748	(54,790)	(71,026)
Limited Practice Officers	156,805	195,088	72,194	99,305	12,942	21,042	85,136	120,347	71,669	74,741
Mandatory CLE	1,111,250	1,125,250	564,459	714,329	7,193	67,015	571,652	781,344	539,597	343,906
Member Wellness Program	6,000	7,500	156,892	234,719	1,589	2,550	158,481	237,269	(152,481)	(229,769)
Member Services & Engagement	11,938	11,800	219,559	302,978	6,769	39,500	226,328	342,478	(214,390)	(330,678)
Mini CLE	-	-	82,854	114,412	-	-	82,854	114,412	(82,854)	(114,412)
New Member Education	97,858	85,000	68,690	95,269	-	1,600	68,690	96,869	29,168	(11,869)
Office of General Counsel	-	963	693,034	1,038,134	4,070	19,400	697,104	1,057,534	(697,104)	(1,056,571)
Office of the Executive Director	-	-	413,883	568,259	27,143	128,775	441,027	697,034	(441,027)	(697,034)
OGC-Disciplinary Board	-	-	160,054	217,139	59,391	103,500	219,445	320,639	(219,445)	(320,639)
Practice of Law Board	-	-	45,891	63,355	2,220	12,000	48,111	75,355	(48,111)	(75,355)
Practice Management Assistance	50,166	50,000	96,516	133,033	73,616	73,650	170,133	206,683	(119,967)	(156,683)
Professional Responsibility Program	-	-	167,788	151,321	2,465	2,250	170,253	153,571	(170,253)	(153,571)
Public Service Programs	130,000	130,000	142,140	219,329	98,105	266,928	240,245	486,257	(110,245)	(356,257)
Publication and Design Services	-	-	87,003	119,175	4,200	4,612	91,203	123,787	(91,203)	(123,787)
Regulatory Services FTE			396,783	536,908	6,033	23,550	402,816	560,458	(402,816)	(560,458)
Sections Administration	355,066	290,543	211,850	290,746	911	7,850	212,760	298,596	142,306	(8,053)
Service Center	-	-	517,939	703,381	5,199	10,300	523,138	713,681	(523,138)	(713,681)
Volunteer Engagement	-	-	73,482	97,639	7,272	17,850	80,754	115,489.27	(80,754)	(115,489)
Technology	-	-	1,447,710	1,996,602	-	-	1,447,710	1,996,602	(1,447,710)	(1,996,602)
Subtotal General Fund	**17,560,011**	21,891,872	**14,440,636**	**19,802,808**	**1,228,406**	2,650,264	**15,669,042**	22,453,072	**1,890,969**	**(561,199)**
Expenses using reserve funds									-	-
Total General Fund - Net Result from Operations									**1,890,969**	**(561,199)**
Percentage of Budget	**80%**		**73%**		**46%**		**70%**			
CLE-Seminars and Products	1,242,055	1,653,725	779,212	1,079,536	120,640	307,219	899,853	1,386,755	342,202	266,970
CLE - Deskbooks	84,867	241,000	162,467	222,410	6,594	68,325	169,061	290,735	(84,194)	(49,735)
Total CLE	1,326,922	1,894,725	941,679	1,301,946	127,234	375,544	1,068,914	1,677,490	258,009	217,235
Percentage of Budget	**70%**		**72%**		**34%**		**64%**			
Total All Sections	586,781	649,695	-	-	509,307	904,646	509,307	904,646	77,474	(254,951)
Client Protection Fund-Restricted	887,436	730,000	131,064	181,912	85,642	502,300	216,706	684,212	670,730	45,788
Totals	**20,361,150**	**25,166,292**	**15,513,380**	**21,286,666**	**1,950,589**	**4,432,754**	**17,463,968**	**25,719,419**	**2,897,181**	**(553,127)**
Percentage of Budget	**81%**		**73%**		**44%**		**68%**			

Summary of Fund Balances:	Fund Balances Sept. 30, 2022	2023 Budgeted Fund Balances	Fund Balances Year to date
Restricted Funds:			
Client Protection Fund	4,063,501	4,109,289	4,734,231
Board-Designated Funds (Non-General Fund):			
CLE Fund Balance	1,042,049	1,259,284	1,300,058
Section Funds	1,802,650	1,547,699	1,880,123
Board-Designated Funds (General Fund):			
Operating Reserve Fund	2,000,000	2,000,000	2,000,000
Facilities Reserve Fund	1,000,000	1,000,000	2,700,000
Unrestricted Funds (General Fund):			
Unrestricted General Fund	5,713,268	5,152,068	5,904,236
Total General Fund Balance	**8,713,268**	**8,152,068**	**10,604,236**
Net Change in Total General Fund Balance		**(561,199)**	**1,890,969**
Total Fund Balance	**15,621,468**	**15,068,341**	**18,518,649**
Net Change In Fund Balance		**(553,127)**	**2,897,181**

Washington State Bar Association
Analysis of Cash Investments
As of June 30, 2023

Checking & Savings Accounts

General Fund

Checking

Bank	Account		Amount
Wells Fargo	General	$	712,498
		Total	

Investments	Rate		Amount
Wells Fargo Money Market	0.62%	$	5,376,442
UBS Financial Money Market	0.23%	$	1,104,558
Morgan Stanley Money Market	0.47%	$	3,492,115
Merrill Lynch Money Market	1.71%	$	762,994
CDs/Treasuries	see list	$	10,713,373
	General Fund Total	**$**	**22,161,981**

Client Protection Fund

Checking

Bank		Amount
Wells Fargo	$	1,350,172

Investments	Rate		Amount
Wells Fargo Money Market	0.65%	$	2,058,181
Morgan Stanley Money Market	0.39%	$	110,763
CDs/Treasuries	see list	$	1,495,088
	Client Protection Fund Total	**$**	**5,014,205**

Grand Total Cash & Investments	**$**	**27,176,186**

Washington State Bar Association
Analysis of Cash Investments
As of June 30, 2023

General Fund

Bank	Yield	Term Months	Settle Date	Maturity Date	Amount
Wells Fargo CDs					
US Treasury Bill	4.65%	9	1/12/2023	7/13/2023	244,331
FAMCA CD	4.75%	6	2/2/2023	8/3/2023	246,738
State Bank of India NY CD	3.10%	12	8/8/2022	8/8/2023	250,000
FHLBD CD	4.72%	7	2/10/2023	8/30/2023	247,690
Morgan Stanley Bank CD	5.06%	6	3/9/2023	9/18/2023	250,000
Morgan Stanley Private Bank CD	5.06%	6	3/9/2023	9/18/2023	250,000
Valley National Bank CD	5.15%	6	3/17/2023	9/18/2023	250,000
Fifth Third Bank CD	5.10%	6	3/21/2023	9/21/2023	250,000
Barclays Bank CD	5.10%	6	3/22/2023	9/22/2023	250,000
Wells Fargo bank	4.70%	9	12/23/2022	9/25/2023	250,000
Webster Bank CD	5.00%	6	3/29/2023	9/29/2023	250,000
Flagstar Bank CD	5.15%	6	3/30/2023	10/2/2023	250,000
Comerica Bank CD	5.10%	6	3/30/2023	10/2/2023	250,000
American Commercial Bank CD	5.10%	6	4/5/2023	10/5/2023	250,000
SOFI Bank CD	4.55%	9	1/23/2023	10/23/2023	250,000
Fairfield County Bank CD	4.65%	9	2/3/2023	11/3/2023	250,000
FHLB CD	4.75%	9	2/13/2023	11/7/2023	250,484
Independent Bank CD	4.75%	9	2/24/2023	11/24/2023	250,000
FHDN CD	5.25%	6	5/31/2023	11/24/2023	243,793
DFC Note	4.75%	11	2/2/2023	12/14/2023	252,332
NexBank CD	5.25%	9	3/22/2023	12/20/2023	250,000
Citizens Bank CD	5.15%	9	3/22/2023	12/22/2023	250,000
Bank of Hope CD	5.25%	9	3/24/2023	12/26/2023	250,000
Hancock Whitney Bank CD	5.35%	9	3/23/2023	12/26/2023	250,000
CrossFirst Bank CD	5.20%	9	3/24/2023	12/26/2023	250,000
Zions BankCorp CD	5.30%	9	3/31/2023	12/29/2023	250,000
FHDN CD	4.75%	11	2/13/2023	1/11/2024	239,533
FFCB CD	4.75%	12	2/2/2023	1/18/2024	241,148
JP Morgan Chase Bank CD	4.95%	11	2/28/2023	1/31/2024	250,000
FHLBDN CD	4.75%	12	2/13/2023	2/2/2024	250,325
TowneBank CD	4.65%	12	2/8/2023	2/8/2024	250,000
Millyard Bank CD	4.65%	12	2/9/2023	2/9/2024	250,000
Encore Bank CD	5.35%	9	6/7/2023	3/7/2024	250,000
Customers Bank CD	5.20%	12	3/30/2023	3/28/2024	250,000
Truist Bank CD	5.25%	12	6/2/2023	5/31/2024	250,000
				Total from WF	***8,716,373***
Merrill Lynch CDs					
The bank of east asia, limited NY CD	5.10%	1	6/12/2023	7/12/2023	248,000
City National bank of florida CD	5.30%	3	6/12/2023	9/12/2023	246,000
US Treasury Bill	5.34%	3	6/15/2023	9/14/2023	270,000
US Bank, National Assoc. CD	5.25%	6	6/12/2023	12/7/2023	243,000
US Treasury Bill	5.43%	6	6/15/2023	12/14/2023	270,000
TBK bank CD	5.25%	9	6/12/2023	3/11/2024	240,000
Banner bank CD	5.25%	12	6/12/2023	6/11/2024	237,000
Bank hapoalim B.M CD	5.20%	18	6/12/2023	12/9/2024	243,000
				Total from ML	**1,997,000**
				Total	**10,713,373**

Washington State Bar Association
Analysis of Cash Investments
As of June 30, 2023

Client Fund Protection Fund

Bank	Yield	Term Months	Settle Date	Maturity Date	Amount
Washington Trust CD	4.80%	6	3/8/2023	9/8/2023	250,000
Renasant Bank CD	5.10%	6	3/22/2023	9/22/2023	250,000
Bremer Bank CD	5.10%	6	3/22/2023	9/22/2023	250,000
CapStar Bank CD	4.80%	9	3/3/2023	12/4/2023	250,000
US Treasury Note	4.95%	11	3/2/2023	1/31/2024	245,088
Western Alliance Bank CD	5.00%	12	3/9/2023	3/8/2024	250,000
				Total	**1,495,088**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LICENSE FEES						
REVENUE:						
LICENSE FEES	17,053,467	1,393,238	12,702,188	4,351,279	74%	(87,912)
TOTAL REVENUE:	**17,053,467**	**1,393,238**	**12,702,188**	**4,351,279**	**74%**	**(87,912)**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ACCESS TO JUSTICE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
SURVEYS	100	-	331	(231)	331%	(256)
ATJ BOARD RETREAT	2,000	-	2,130	(130)	107%	(630)
LEADERSHIP TRAINING	2,000	-	2,175	(175)	109%	(675)
ATJ BOARD EXPENSE	78,400	5,874	44,498	33,902	57%	14,302
STAFF TRAVEL/PARKING	3,000	-	1,119	1,881	37%	1,131
STAFF CONFERENCE & TRAINING	1,675	-	375	1,300	22%	881
PUBLIC DEFENSE	4,000	-	810	3,190	20%	2,190
CONFERENCE/INSTITUTE EXPENSE	23,145	(275)	15,214	7,931	66%	2,145
RECEPTION/FORUM EXPENSE	7,500	-	748	6,752	10%	4,877
TOTAL DIRECT EXPENSES:	**121,820**	**5,599**	**67,400**	**54,420**	**55%**	**23,965**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.64 FTE)	138,139	11,444	104,778	33,361	76%	(1,174)
BENEFITS EXPENSE	48,192	4,136	35,106	13,086	73%	1,038
OTHER INDIRECT EXPENSE	50,751	3,200	34,448	16,302	68%	3,615
TOTAL INDIRECT EXPENSES:	**237,082**	**18,780**	**174,332**	**62,749**	**74%**	**3,479**
TOTAL ALL EXPENSES:	**358,902**	**24,379**	**241,733**	**117,169**	**67%**	**27,443**
NET INCOME (LOSS):	**(358,902)**	**(24,379)**	**(241,733)**	**(117,169)**	**67%**	**27,443**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

ADMISSIONS

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
EXAM SOFTWARE REVENUE	27,000	-	6,715	20,285	25%	(13,535)
BAR EXAM FEES	1,253,000	35,295	1,083,664	169,336	86%	143,914
RULE 9/LEGAL INTERN FEES	12,000	1,350	11,350	650	95%	2,350
SPECIAL ADMISSIONS	70,940	1,240	21,425	49,515	30%	(31,780)
TOTAL REVENUE:	**1,362,940**	**37,885**	**1,123,154**	**239,786**	**82%**	**100,949**
DIRECT EXPENSES:						
POSTAGE	750	-	493	257	66%	70
STAFF TRAVEL/PARKING	23,000	-	9,105	13,895	40%	8,145
STAFF MEMBERSHIP DUES	600	250	400	200	67%	50
SUPPLIES	2,750	-	784	1,966	28%	1,279
FACILITY, PARKING, FOOD	101,000	-	45,564	55,436	45%	30,186
EXAMINER FEES	36,000	-	12,500	23,500	35%	14,500
UBE EXMINATIONS	123,000	-	32,208	90,792	26%	60,042
BOARD OF BAR EXAMINERS **	21,850	731	13,305	8,545	61%	3,082
BAR EXAM PROCTORS	39,000	-	16,132	22,868	41%	13,118
DISABILITY ACCOMMODATIONS	27,000	2,450	18,438	8,562	68%	1,812
CHARACTER & FITNESS INVESTIGATIONS	2,000	-	-	2,000	0%	1,500
LAW SCHOOL VISITS	1,700	20	249	1,451	15%	1,026
DEPRECIATION-SOFTWARE	24,929	2,038	18,337	6,592	74%	360
STAFF CONFERENCE & TRAINING	10,500	(1,039)	1,644	8,856	16%	6,231
TOTAL DIRECT EXPENSES:	**414,079**	**4,450**	**169,159**	**244,921**	**41%**	**141,401**
INDIRECT EXPENSES:						
SALARY EXPENSE (6.75 FTE)	512,745	40,662	369,535	143,210	72%	15,023
BENEFITS EXPENSE	171,146	17,117	145,406	25,740	85%	(17,047)
OTHER INDIRECT EXPENSE	208,882	13,183	141,590	67,292	68%	15,072
TOTAL INDIRECT EXPENSES:	**892,773**	**70,962**	**656,532**	**236,242**	**74%**	**13,048**
TOTAL ALL EXPENSES:	**1,306,852**	**75,411**	**825,690**	**481,162**	**63%**	**154,449**
NET INCOME (LOSS):	**56,088**	**(37,526)**	**297,464**	**(241,376)**	**530%**	**255,398**

***Budget reallocations apply to this line item. For details, see FY23 Budget Reallocations memo(s) included in the Board of Governors meeting materials.*

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ADVANCEMENT FTE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF CONFERENCE & TRAINING	8,100	590	3,004	5,096	37%	3,071
TOTAL DIRECT EXPENSES:	**8,100**	**590**	**3,004**	**5,096**	**37%**	**3,071**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.88 FTE)	233,777	19,260	175,505	58,272	75%	(172)
BENEFITS EXPENSE	62,511	5,414	46,196	16,315	74%	687
OTHER INDIRECT EXPENSE	58,178	3,667	39,309	18,869	68%	4,325
TOTAL INDIRECT EXPENSES:	**354,465**	**28,341**	**261,009**	**93,456**	**74%**	**4,840**
TOTAL ALL EXPENSES:	**362,565**	**28,931**	**264,013**	**98,552**	**73%**	**7,911**
NET INCOME (LOSS):	**(362,565)**	**(28,931)**	**(264,013)**	**(98,552)**	**73%**	**7,911**

Washington State Bar Association

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For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
BAR NEWS						
REVENUE:						
DISPLAY ADVERTISING	400,000	45,000	309,000	91,000	77%	9,000
SUBSCRIPT/SINGLE ISSUES	200	-	36	164	18%	(114)
CLASSIFIED ADVERTISING	2,500	611	6,390	(3,890)	256%	4,515
JOB TARGET ADVERSTISING	200,000	14,246	100,326	99,674	50%	(49,674)
TOTAL REVENUE:	**602,700**	**59,857**	**415,751**	**186,949**	**69%**	**(36,274)**
DIRECT EXPENSES:						
POSTAGE	110,000	15,907	86,839	23,161	79%	(4,339)
PRINTING, COPYING & MAILING	250,000	23,327	168,088	81,912	67%	19,412
DIGITAL/ONLINE DEVELOPMENT	1,000	-	1,121	(121)	112%	(371)
GRAPHICS/ARTWORK	100	-	-	100	0%	75
STAFF CONFERENCE & TRAINING	2,000	-	-	2,000	0%	1,500
STAFF MEMBERSHIP DUES	135	-	-	135	0%	101
SUBSCRIPTIONS	225	-	(347)	572	-154%	516
TOTAL DIRECT EXPENSES:	**363,460**	**39,233**	**255,700**	**107,760**	**70%**	**16,895**
INDIRECT EXPENSES:						
SALARY EXPENSE (2.23 FTE)	209,396	17,119	157,634	51,762	75%	(587)
BENEFITS EXPENSE	54,103	4,698	39,855	14,248	74%	722
OTHER INDIRECT EXPENSE	69,008	4,358	46,802	22,207	68%	4,955
TOTAL INDIRECT EXPENSES:	**332,507**	**26,175**	**244,291**	**88,217**	**73%**	**5,090**
TOTAL ALL EXPENSES:	**695,967**	**65,408**	**499,991**	**195,976**	**72%**	**21,985**
NET INCOME (LOSS):	**(93,267)**	**(5,551)**	**(84,239)**	**(9,028)**	**90%**	**(14,289)**

Washington State Bar Association

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75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
BOARD OF GOVERNORS						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
BOG MEETINGS	205,000	29,090	105,281	99,719	51%	48,469
BOG COMMITTEES' EXPENSES **	3,000	-	145	2,855	5%	2,105
BOG RETREAT	50,000	2,332	21,874	28,126	44%	15,626
BOG CONFERENCE ATTENDANCE	43,000	2,162	22,248	20,752	52%	10,002
BOG TRAVEL & OUTREACH **	14,000	894	17,095	(3,095)	122%	(6,595)
LEADERSHIP TRAINING	20,000	56	7,738	12,262	39%	7,262
BOG ELECTIONS	26,900	4,700	18,400	8,500	68%	1,775
PRESIDENT'S DINNER	10,000	-	-	10,000	0%	7,500
CONSULTING SERVICES	-	-	6,143	(6,143)		(6,143)
TOTAL DIRECT EXPENSES:	**371,900**	**39,235**	**198,922**	**172,978**	**53%**	**80,003**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.40 FTE)	112,271	11,236	91,628	20,643	82%	(7,425)
BENEFITS EXPENSE	36,105	3,079	26,083	10,023	72%	996
OTHER INDIRECT EXPENSE	43,324	2,730	29,325	13,999	68%	3,168
TOTAL INDIRECT EXPENSES:	**191,700**	**17,045**	**147,036**	**44,664**	**77%**	**(3,261)**
TOTAL ALL EXPENSES:	**563,600**	**56,280.36**	**345,958**	**217,642**	**61%**	**76,742**
NET INCOME (LOSS):	**(563,600)**	**(56,280)**	**(345,958)**	**(217,642)**	**61%**	**76,742**

***Budget reallocations have been applied to this line item. For details, see FY23 Budget Reallocations memo(s) included in the Board of Governors meeting materials.*

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CHARACTER & FITNESS BOARD						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CHARACTER & FITNESS BOARD EXP	12,000	273	273	11,727	2%	8,727
COURT REPORTERS	15,000	-	869	14,131	6%	10,381
TOTAL DIRECT EXPENSES:	**27,000**	**272.76**	**1,141.76**	**25,858**	**4%**	**19,108**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.75 FTE)	90,551	7,297	67,638	22,913	75%	275
BENEFITS EXPENSE	25,863	2,184	18,625	7,238	72%	772
OTHER INDIRECT EXPENSE	23,209	1,464	15,901	7,308	69%	1,506
TOTAL INDIRECT EXPENSES:	**139,623**	**10,945**	**102,164**	**37,459**	**73%**	**2,553**
TOTAL ALL EXPENSES:	**166,623**	**11,218**	**103,306**	**63,317**	**62%**	**21,661**
NET INCOME (LOSS):	**(166,623)**	**(11,218)**	**(103,306)**	**(63,317)**	**62%**	**21,661**

Washington State Bar Association

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75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LAW CLERK PROGRAM						
REVENUE:						
LAW CLERK FEES	185,000	1,000	193,833	(8,833)	105%	55,083
LAW CLERK APPLICATION FEES	3,200	1,200	2,800	400	88%	400
TOTAL REVENUE:	**188,200**	**2,200**	**196,633**	**(8,433)**	**104%**	**55,483**
DIRECT EXPENSES:						
SUBSCRIPTIONS	250	-	-	250	0%	188
CHARACTER & FITNESS INVESTIGATIONS	100	-	-	100	0%	75
LAW CLERK BOARD EXPENSE	8,000	1,147	5,680	2,320	71%	320
LAW CLERK OUTREACH	550	-	-	550	0%	413
TOTAL DIRECT EXPENSES:	**8,900**	**1,147**	**5,680**	**3,220**	**64%**	**995**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.98 FTE)	82,442	6,683	61,140	21,301	74%	691
BENEFITS EXPENSE	25,330	2,142	18,156	7,175	72%	842
OTHER INDIRECT EXPENSE	30,327	1,903	20,439	9,888	67%	2,306
TOTAL INDIRECT EXPENSES:	**138,099**	**10,729**	**99,735**	**38,364**	**72%**	**3,839**
TOTAL ALL EXPENSES:	**146,999**	**11,876**	**105,415**	**41,584**	**72%**	**4,834**
NET INCOME (LOSS):	**41,201**	**(9,676)**	**91,218**	**(50,017)**	**221%**	**60,317**

Washington State Bar Association

Statement of Activities
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75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CONTINUING LEGAL EDUCATION (CLE)						
REVENUE:						
SEMINAR REGISTRATIONS	850,000	52,303	494,108	355,892	58%	(143,392)
SEMINAR REVENUE-OTHER	20,000	11,730	20,970	(970)	105%	5,970
SEMINAR SPLITS W/ CLE	(133,375)	-	-	(133,375)	0%	100,031
SHIPPING & HANDLING	100	9	108	(8)	108%	33
COURSEBOOK SALES	7,000	45	815	6,185	12%	(4,435)
MP3 AND VIDEO SALES	910,000	36,081	726,054	183,946	80%	43,554
TOTAL REVENUE:	**1,653,725**	**100,168**	**1,242,055**	**411,670**	**75%**	**(37,390)**
DIRECT EXPENSES:						
COURSEBOOK PRODUCTION	1,000	-	-	1,000	0%	750
POSTAGE - FLIERS/CATALOGS	5,000	-	-	5,000	0%	3,750
DEPRECIATION	1,309	279	2,512	(1,203)	192%	(1,530)
ONLINE EXPENSES	53,000	4,229	36,161	16,839	68%	3,589
ACCREDITATION FEES	3,000	(84)	2,628	372	88%	(378)
SEMINAR BROCHURES	20,000	-	-	20,000	0%	15,000
FACILITIES	165,200	800	53,898	111,302	33%	70,002
DISABILITY ACCOMMODATIONS	4,000	-	-	4,000	0%	3,000
SPEAKERS & PROGRAM DEVELOP	32,000	9,815	17,446	14,554	55%	6,554
HONORARIA	1,200	-	-	1,200	0%	900
CLE SEMINAR COMMITTEE	200	-	-	200	0%	150
STAFF TRAVEL/PARKING	15,000	4,144	6,969	8,031	46%	4,281
STAFF CONFERENCE & TRAINING	2,370	-	-	2,370	0%	1,778
STAFF MEMBERSHIP DUES	1,700	-	902	798	53%	373
COST OF SALES - COURSEBOOKS	690	1	92	598	13%	426
A/V DEVELOP COSTS (RECORDING)	1,250	-	-	1,250	0%	938
POSTAGE & DELIVERY-COURSEBOOKS	-	-	34	(34)		(34)
STAFF TRAVEL/PARKING	300	-	-	300	0%	225
TOTAL DIRECT EXPENSES:	**307,219**	**19,184**	**120,640**	**186,579**	**39%**	**109,774**
INDIRECT EXPENSES:						
SALARY EXPENSE (8.13 FTE)	596,422	48,668	446,614	149,807	75%	702
BENEFITS EXPENSE	220,069	19,142	162,181	57,888	74%	2,871
OTHER INDIRECT EXPENSE	263,045	15,884	170,417	92,628	65%	26,867
TOTAL INDIRECT EXPENSES:	**1,079,536**	**83,695**	**779,212**	**300,323**	**72%**	**30,439**
TOTAL ALL EXPENSES:	**1,386,755**	**102,879**	**899,853**	**486,902**	**65%**	**140,213**
NET INCOME (LOSS):	**266,970**	**(2,711)**	**342,202**	**(75,232)**	**128%**	**141,975**

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75% OF YEAR COMPLETE

COMMUNICATION STRATEGIES FTE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
INDIRECT EXPENSES:						
SALARY EXPENSE (1.00 FTE)	168,213	13,670	126,747	41,466	75%	(587)
BENEFITS EXPENSE	44,241	3,782	32,405	11,836	73%	776
OTHER INDIRECT EXPENSE	30,946	1,958	21,031	9,915	68%	2,178
TOTAL INDIRECT EXPENSES:	**243,400**	**19,410**	**180,183**	**63,217**	**74%**	**2,367**
NET INCOME (LOSS):	**(243,400)**	**(19,410)**	**(180,183)**	**(63,217)**	**74%**	**2,367**

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75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
COMMUNICATION STRATEGIES						
REVENUE:						
SPONSORSHIPS	1,000	-	-	1,000	0%	(750)
50 YEAR MEMBER PLAQUE	2,500	1,620	1,962	538	78%	87
TOTAL REVENUE:	**3,500**	**1,620**	**1,962**	**1,538**	**56%**	**(663)**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,395	198	1,782	1,613	52%	764
STAFF MEMBERSHIP DUES	1,120	583	1,297	(177)	116%	(457)
SUBSCRIPTIONS	4,000	168	1,891	2,109	47%	1,109
APEX DINNER	47,000	17,500	17,500	29,500	37%	17,750
50 YEAR MEMBER TRIBUTE LUNCH	20,000	3,300	3,428	16,572	17%	11,572
BAR OUTREACH	18,000	-	566	17,434	3%	12,934
COMMUNICATIONS OUTREACH	15,000	-	1,245	13,755	8%	10,005
STAFF CONFERENCE & TRAINING	7,500	-	1,817	5,683	24%	3,808
TOTAL DIRECT EXPENSES:	**116,015**	**21,749**	**29,525**	**86,490**	**25%**	**57,486**
INDIRECT EXPENSES:						
SALARY EXPENSE (5.20 FTE)	387,612	31,691	290,901	96,712	75%	(191)
BENEFITS EXPENSE	126,285	11,054	93,549	32,736	74%	1,165
OTHER INDIRECT EXPENSE	160,917	10,177	109,303	51,614	68%	11,385
TOTAL INDIRECT EXPENSES:	**674,814**	**52,923**	**493,752**	**181,061**	**73%**	**12,358**
TOTAL ALL EXPENSES:	**790,829**	**74,671**	**523,277**	**267,551**	**66%**	**69,844**
NET INCOME (LOSS):	**(787,329)**	**(73,052)**	**(521,316)**	**(266,013)**	**66%**	**69,181**

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75% OF YEAR COMPLETE

CLIENT PROTECTION FUND

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
CPF RESTITUTION	40,000	976	6,795	33,205	17%	(23,205)
CPF MEMBER ASSESSMENTS	690,000	3,100	703,930	(13,930)	102%	186,430
INTEREST INCOME **	-	22,716	176,710	(176,710)		176,710
TOTAL REVENUE:	**730,000**	**26,792**	**887,436**	**(157,436)**	**122%**	**339,936**
DIRECT EXPENSES:						
BANK FEES - WELLS FARGO	2,100	250	1,898	202	90%	(323)
GIFTS TO INJURED CLIENTS	500,000	-	82,963	417,037	17%	292,037
CPF BOARD EXPENSES **	-	-	781	(781)		(781)
STAFF MEMBERSHIP DUES	200	-	-	200	0%	150
TOTAL DIRECT EXPENSES:	**502,300**	**250**	**85,642**	**416,658**	**17%**	**291,083**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.23 FTE)	104,797	8,475	78,557	26,240	75%	41
BENEFITS EXPENSE	37,207	3,149	26,736	10,471	72%	1,169
OTHER INDIRECT EXPENSE	39,907	2,399	25,771	14,137	65%	4,160
TOTAL INDIRECT EXPENSES:	**181,912**	**14,023**	**131,064**	**50,848**	**72%**	**5,370**
TOTAL ALL EXPENSES:	**684,212**	**14,274**	**216,706**	**467,506**	**32%**	**296,453**
NET INCOME (LOSS):	**45,788**	**12,519**	**670,730**	**(624,942)**	**1465%**	**636,389**

***Budget reallocations apply to this line item. For details, see FY23 Budget Reallocations memo(s) included in the Board of Governors meeting materials.*

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	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DESKBOOKS						
REVENUE:						
DESKBOOK SALES	150,000	-	31,198	118,802	21%	(81,302)
LEXIS/NEXIS ROYALTIES	35,000	8,531	27,650	7,350	79%	1,400
SECTION PUBLICATION SALES	6,000	-	1,850	4,151	31%	(2,651)
FASTCASE ROYALTIES	50,000	8,562	24,169	25,831	48%	(13,331)
TOTAL REVENUE:	**241,000**	**17,093**	**84,867**	**156,133**	**35%**	**(95,883)**
DIRECT EXPENSES:						
COST OF SALES - DESKBOOKS	65,000	-	4,966	60,034	8%	43,784
COST OF SALES - SECTION PUBLICATION	1,500	-	832	668	55%	293
SPLITS TO SECTIONS	300	113	320	(20)	107%	(95)
DESKBOOK ROYALTIES	300	-	92	208	31%	133
STAFF CONFRENCES & TRAINING	1,000	-	-	1,000	0%	750
POSTAGE & DELIVER-DESKBOOKS	-	-	90	(90)		(90)
STAFF MEMBERSHIP DUES	225	30	256	(31)	114%	(87)
SUBSCRIPTIONS	-	-	39	(39)		(39)
TOTAL DIRECT EXPENSES:	**68,325**	**143**	**6,594**	**61,731**	**10%**	**44,650**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.50 FTE)	132,287	10,727	100,588	31,700	76%	(1,372)
BENEFITS EXPENSE	41,948	3,591	30,481	11,467	73%	980
OTHER INDIRECT EXPENSE	48,175	2,924	31,399	16,777	65%	4,733
TOTAL INDIRECT EXPENSES:	**222,410**	**17,241**	**162,467**	**59,943**	**73%**	**4,341**
TOTAL ALL EXPENSES:	**290,735**	**17,384**	**169,061**	**121,674**	**58%**	**48,990**
NET INCOME (LOSS):	**(49,735)**	**(291)**	**(84,194)**	**34,458**	**169%**	**(46,892)**

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75% OF YEAR COMPLETE

DISCIPLINE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
AUDIT REVENUE	1,000	-	701	299	70%	(49)
RECOVERY OF DISCIPLINE COSTS	100,000	10,817	41,103	58,897	41%	(33,897)
DISCIPLINE HISTORY SUMMARY	18,000	1,200	14,099	3,901	78%	599
TOTAL REVENUE:	**119,000**	**12,017**	**55,903**	**63,097**	**47%**	**(33,347)**
DIRECT EXPENSES:						
DEPRECIATION-SOFTWARE	45,835	-	-	45,835	0%	34,376
PUBLICATIONS PRODUCTION	200	-	169	31	84%	(19)
STAFF TRAVEL/PARKING	20,000	989	5,670	14,330	28%	9,330
STAFF MEMBERSHIP DUES	7,610	-	1,920	5,690	25%	3,788
TELEPHONE	2,359	-	2,426	(67)	103%	(656)
COURT REPORTERS	60,000	7,317	44,348	15,652	74%	652
OUTSIDE COUNSEL/AIC	1,500	-	-	1,500	0%	1,125
LITIGATION EXPENSES	25,000	8,283	18,643	6,357	75%	107
DISABILITY EXPENSES	9,000	174	198	8,802	2%	6,552
TRANSLATION SERVICES	1,200	-	150	1,050	13%	750
STAFF CONFERENCE & TRAINING	33,295	4,838	18,827	14,468	57%	6,144
PRACTICE MONITOR EXPENSE	1,000	-	-	1,000	0%	750
TOTAL DIRECT EXPENSES:	**206,999**	**21,602**	**92,351**	**114,648**	**45%**	**62,898**
INDIRECT EXPENSES:						
SALARY EXPENSE (37.80 FTE)	3,764,781	308,941	2,616,774	1,148,007	70%	206,811
BENEFITS EXPENSE	1,073,208	94,490	803,473	269,735	75%	1,433
OTHER INDIRECT EXPENSE	1,169,740	73,888	793,556	376,184	68%	83,749
TOTAL INDIRECT EXPENSES:	**6,007,729**	**477,318**	**4,213,803**	**1,793,926**	**70%**	**291,994**
TOTAL ALL EXPENSES:	**6,214,728**	**498,920**	**4,306,154**	**1,908,574**	**69%**	**354,892**
NET INCOME (LOSS):	**(6,095,728)**	**(486,903)**	**(4,250,251)**	**(1,845,477)**	**70%**	**321,545**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DIVERSITY						
REVENUE:						
DONATIONS	135,000	-	135,000	-	100%	33,750
TOTAL REVENUE:	**135,000**	**-**	**135,000**	**-**	**100%**	**33,750**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	2,000	-	774	1,226	39%	726
STAFF MEMBERSHIP DUES	360	-	90	270	25%	180
COMMITTEE FOR DIVERSITY	3,800	-	953	2,847	25%	1,897
DIVERSITY EVENTS & PROJECTS **	19,250	-	3,503	15,747	18%	10,935
SURVEYS **	45,000	7,000	16,500	28,500	37%	17,250
STAFF CONFERENCE & TRAINING **	5,000	-	600	4,400	12%	3,150
CONSULTING SERVICES	54,625	-	13,575	41,050	25%	27,394
TOTAL DIRECT EXPENSE:	**130,035**	**7,000**	**35,995**	**94,040**	**28%**	**61,532**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.69 FTE)	144,941	11,223	80,526	64,415	56%	28,180
BENEFITS EXPENSE	43,533	(2,262)	30,803	12,730	71%	1,847
OTHER INDIRECT EXPENSE	52,260	(3,684)	35,546	16,714	68%	3,649
TOTAL INDIRECT EXPENSES:	**240,734**	**5,278**	**146,875**	**93,859**	**61%**	**33,676**
TOTAL ALL EXPENSES:	**370,769**	**12,278**	**182,869**	**187,899**	**49%**	**95,207**
NET INCOME (LOSS):	**(235,769)**	**(12,278)**	**(47,869)**	**(187,899)**	**20%**	**128,957**

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Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
FINANCE						
(Previously ADMINISTRATION cost center)						
REVENUE:						
INTEREST INCOME **	26,000	99,773	636,016	(610,016)	2446%	616,516
TOTAL REVENUE:	**26,000**	**99,773**	**636,016**	**(610,016)**	**2446%**	**616,516**
DIRECT EXPENSES:						
CONSULTING SERVICES **	3,000	875	875	2,125	29%	1,375
STAFF TRAVEL/PARKING	3,000	90	2,212	788	74%	38
STAFF CONFERENCE & TRAINING	500	-	-	500	0%	375
STAFF MEMBERSHIP DUES	-	-	685	(685)		(685)
TOTAL DIRECT EXPENSES:	**6,500**	**965**	**3,772**	**2,728**	**58%**	**1,103**
INDIRECT EXPENSES:						
SALARY EXPENSE (6.92 FTE)	661,642	52,372	498,623	163,019	75%	(2,392)
BENEFITS EXPENSE	205,235	17,943	152,452	52,782	74%	1,474
OTHER INDIRECT EXPENSE	213,844	13,570	145,737	68,107	68%	14,646
TOTAL INDIRECT EXPENSES:	**1,080,720**	**83,885**	**796,812**	**283,908**	**74%**	**13,728**
TOTAL ALL EXPENSES:	**1,087,220**	**84,850**	**800,584**	**286,636**	**74%**	**14,831**
NET INCOME (LOSS):	**(1,061,220)**	**14,923**	**(164,569)**	**(896,652)**	**16%**	**631,346**

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Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
FOUNDATION						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	3,000	-	3,000	-	100%	(750)
PRINTING & COPYING	450	-	-	450	0%	338
STAFF TRAVEL/PARKING	700	-	-	700	0%	525
SUPPLIES	150	-	24	126	16%	88
BOARD OF TRUSTEES	750	64	103	647	14%	460
POSTAGE	300	-	8	292	3%	217
STAFF CONFERENCE & TRAINING	300	-	-	300	0%	225
TOTAL DIRECT EXPENSES:	**5,650**	**64**	**3,134**	**2,516**	**55%**	**1,103**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.05 FTE)	96,359	8,012	71,860	24,500	75%	410
BENEFITS EXPENSE	18,295	1,549	13,072	5,224	71%	650
OTHER INDIRECT EXPENSE	32,493	2,041	21,920	10,573	67%	2,450
TOTAL INDIRECT EXPENSES:	**147,147**	**11,601**	**106,851**	**40,296**	**73%**	**3,510**
TOTAL ALL EXPENSES:	**152,797**	**11,665**	**109,985**	**42,812**	**72%**	**4,613**
NET INCOME (LOSS):	**(152,797)**	**(11,665)**	**(109,985)**	**(42,812)**	**72%**	**4,613**

Washington State Bar Association

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For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
HUMAN RESOURCES						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	700	-	43	657	6%	482
STAFF MEMBERSHIP DUES	800	-	458	342	57%	142
SUBSCRIPTIONS	500	-	1,348	(848)	270%	(973)
STAFF TRAINING- GENERAL **	15,000	-	2,066	12,934	14%	9,184
RECRUITING AND ADVERTISING	6,600	368	3,971	2,629	60%	979
PAYROLL PROCESSING	50,000	3,590	36,180	13,820	72%	1,320
SALARY SURVEYS	1,500	-	-	1,500	0%	1,125
CONSULTING SERVICES	2,000	-	-	2,000	0%	1,500
TRANSFER TO INDIRECT EXPENSE	(77,100)	(3,958)	(44,066)	(33,034)	57%	(13,759)
TOTAL DIRECT EXPENSES:	-	-	-	-		-
INDIRECT EXPENSES:						
SALARY EXPENSE (4.00 FTE)	380,554	27,283	284,625	95,929	75%	790
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(150,000)
BENEFITS EXPENSE	120,251	16,473	89,928	30,323	75%	260
OTHER INDIRECT EXPENSE	123,820	14,826	84,125	39,696	68%	8,741
TOTAL INDIRECT EXPENSES:	**424,625**	**58,582**	**458,678**	**(34,053)**	**108%**	**(140,209)**
TOTAL ALL EXPENSES:	**424,625**	**58,582**	**458,678**	**(34,053)**	**108%**	**(140,209)**
NET INCOME (LOSS):	**(424,625)**	**(58,582)**	**(458,678)**	**34,053**	**108%**	**(140,209)**

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Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LEGISLATIVE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,133	-	124	3,009	4%	2,226
STAFF MEMBERSHIP DUES	450	-	-	450	0%	338
JUD RECOMMEND COMMITTEE	2,250	-	-	2,250	0%	1,688
SUBSCRIPTIONS	2,000	-	1,985	16	99%	(485)
TELEPHONE	-	-	381	(381)		(381)
CONTRACT LOBBYIST	15,000	-	12,500	2,500	83%	(1,250)
LEGISLATIVE COMMITTEE	1,250	-	-	1,250	0%	938
BOG LEGISLATIVE COMMITTEE	300	-	-	300	0%	225
STAFF CONFERENCE & TRAINING	2,400	-	1,842	558	77%	(42)
TOTAL DIRECT EXPENSES:	**26,783**	**-**	**16,831**	**9,952**	**63%**	**3,256**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.70 FTE)	147,316	12,152	107,440	39,876	73%	3,047
BENEFITS EXPENSE	42,758	3,688	31,265	11,493	73%	804
OTHER INDIRECT EXPENSE	52,607	3,310	35,546	17,062	68%	3,910
TOTAL INDIRECT EXPENSES:	**242,681**	**19,149**	**174,250**	**68,431**	**72%**	**7,761**
TOTAL ALL EXPENSES:	**269,464**	**19,149**	**191,081**	**78,383**	**71%**	**11,017**
NET INCOME (LOSS):	**(269,464)**	**(19,149)**	**(191,081)**	**(78,383)**	**71%**	**11,017**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LICENSING & MEMBERSHIP RECORDS						
REVENUE:						
STATUS CERTIFICATE FEES	27,000	2,075	21,500	5,500	80%	1,250
INVESTIGATION FEES	21,000	2,100	20,100	900	96%	4,350
PRO HAC VICE	400,000	29,312	288,082	111,918	72%	(11,918)
MEMBER CONTACT INFORMATION	4,000	1,975	3,464	536	87%	464
PHOTO BAR CARD SALES	200	12	180	20	90%	30
TOTAL REVENUE:	**452,200**	**35,474**	**333,326**	**118,874**	**74%**	**(5,824)**
DIRECT EXPENSES:						
DEPRECIATION	1,151	-	-	1,151	0%	863
POSTAGE	16,500	-	18,061	(1,561)	109%	(5,686)
LICENSING FORMS	2,000	-	2,401	(401)	120%	(901)
CONSULTING SERVICES **	4,000	-	-	4,000	0%	3,000
SUPPLIES - BAR CARDS	-	-	1,750	(1,750)		(1,750)
TOTAL DIRECT EXPENSES:	**23,651**	**-**	**22,212**	**1,439**	**94%**	**(4,474)**
INDIRECT EXPENSES:						
SALARY EXPENSE (3.83 FTE)	379,520	31,084	296,071	83,449	78%	(11,431)
BENEFITS EXPENSE	124,269	10,796	91,865	32,404	74%	1,337
OTHER INDIRECT EXPENSE	118,521	7,474	80,274	38,247	68%	8,617
TOTAL INDIRECT EXPENSES:	**622,311**	**49,354**	**468,210**	**154,101**	**75%**	**(1,477)**
TOTAL ALL EXPENSES:	**645,962**	**49,354**	**490,422**	**155,540**	**76%**	**(5,950)**
NET INCOME (LOSS):	**(193,762)**	**(13,880)**	**(157,096)**	**(36,666)**	**81%**	**(11,774)**

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Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LIMITED LICENSE LEGAL TECHNICIAN PROGRAM						
REVENUE:						
SEMINAR REGISTRATIONS	12,000	-	-	12,000	0%	(9,000)
LLLT LICENSE FEES	16,622	1,278	10,155	6,467	61%	(2,311)
LLLT LATE LICENSE FEES	1,100	-	133	967	12%	(692)
INVESTIGATION FEES	-	-	100	(100)		100
TOTAL REVENUE:	**29,722**	**1,278**	**10,388**	**19,334**	**35%**	**(11,903)**
DIRECT EXPENSES:						
LLLT BOARD	15,000	598	3,909	11,091	26%	7,341
LLLT EDUCATION	500	-	-	500	0%	375
TOTAL DIRECT EXPENSES:	**15,500**	**598**	**3,909**	**11,591**	**25%**	**7,716**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.53 FTE)	51,548	4,098	37,838	13,710	73%	823
BENEFITS EXPENSE	17,299	1,432	12,175	5,124	70%	799
OTHER INDIRECT EXPENSE	16,401	1,048	11,256	5,145	69%	1,045
TOTAL INDIRECT EXPENSES:	**85,248**	**6,578**	**61,270**	**23,979**	**72%**	**2,667**
TOTAL ALL EXPENSES:	**100,748**	**7,176**	**65,178**	**35,570**	**65%**	**10,383**
NET INCOME (LOSS):	**(71,026)**	**(5,899)**	**(54,790)**	**35,570**	**77%**	**(1,520)**

Washington State Bar Association

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75% OF YEAR COMPLETE

LIMITED PRACTICE OFFICERS

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
INVESTIGATION FEES	500	100	500	-	100%	125
MEMBER LATE FEES	-	-	4,350	(4,350)		4,350
LPO EXAMINATION FEES	28,300	(300)	28,300	-	100%	7,075
LPO LICENSE FEES	164,750	13,352	121,435	43,315	74%	(2,127)
LPO LATE LICENSE FEES	988	-	2,220	(1,232)	225%	1,479
LPO LICENSE FEES - REINSTATES	550	-	-	550	0%	(413)
TOTAL REVENUE:	**195,088**	**13,152**	**156,805**	**38,283**	**80%**	**10,489**
DIRECT EXPENSES:						
FACILITY, PARKING, FOOD	9,000	-	2,168	6,832	24%	4,582
EXAM WRITING	9,000	4,200	8,400	600	93%	(1,650)
LPO BOARD	1,792	-	2,301	(509)	128%	(957)
LPO OUTREACH	1,000	-	-	1,000	0%	750
PRINTING & COPYING	250	-	-	250	0%	188
SUPPLIES	-	-	73	(73)		(73)
TOTAL DIRECT EXPENSES:	**21,042**	**4,200**	**12,942**	**8,100**	**62%**	**2,840**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.68 FTE)	57,874	5,141	43,578	14,296	75%	(172)
BENEFITS EXPENSE	20,388	1,697	14,398	5,990	71%	893
OTHER INDIRECT EXPENSE	21,043	1,324	14,218	6,825	68%	1,564
TOTAL INDIRECT EXPENSES:	**99,305**	**8,162**	**72,194**	**27,111**	**73%**	**2,285**
TOTAL ALL EXPENSES:	**120,347**	**12,362**	**85,136**	**35,211**	**71%**	**5,124**
NET INCOME (LOSS):	**74,741**	**790**	**71,669**	**3,071**	**96%**	**15,614**

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75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MANDATORY CONTINUING LEGAL EDUCATION						
REVENUE:						
ACCREDITED PROGRAM FEES	550,000	54,400	512,500	37,500	93%	100,000
FORM 1 LATE FEES	220,000	22,000	197,900	22,100	90%	32,900
MEMBER LATE FEES	190,000	1,050	231,650	(41,650)	122%	89,150
ANNUAL ACCREDITED SPONSOR FEES	38,250	-	38,750	(500)	101%	10,063
ATTENDANCE LATE FEES	98,000	13,250	100,900	(2,900)	103%	27,400
COMITY CERTIFICATES	29,000	500	29,550	(550)	102%	7,800
TOTAL REVENUE:	**1,125,250**	**91,200**	**1,111,250**	**14,000**	**99%**	**267,312**
DIRECT EXPENSES:						
DEPRECIATION	59,565	595	6,443	53,122	11%	38,231
STAFF MEMBERSHIP DUES	500	-	500	-	100%	(125)
MCLE BOARD	2,000	-	-	2,000	0%	1,500
STAFF TRAVEL/PARKING	50	-	-	50	0%	38
STAFF CONFERENCE & TRAINING	4,900	-	250	4,650	5%	3,425
TOTAL DIRECT EXPENSES:	**67,015**	**595**	**7,193**	**59,822**	**11%**	**43,068**
INDIRECT EXPENSES:						
SALARY EXPENSE (4.88 FTE)	437,860	33,169	369,481	68,379	84%	(41,086)
BENEFITS EXPENSE	125,455	10,931	92,488	32,967	74%	1,603
OTHER INDIRECT EXPENSE	151,014	9,543	102,490	48,524	68%	10,771
TOTAL INDIRECT EXPENSES:	**714,329**	**53,643**	**564,459**	**149,870**	**79%**	**(28,712)**
TOTAL ALL EXPENSES:	**781,344**	**54,238**	**571,652**	**209,692**	**73%**	**14,356**
NET INCOME (LOSS):	**343,906**	**36,962**	**539,597**	**(195,691)**	**157%**	**281,668**

Washington State Bar Association

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75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MEMBER SERVICES & ENGAGEMENT TEAM						
REVENUE:						
ROYALTIES	10,800	1,200	11,938	(1,138)	111%	3,838
NMP PRODUCT SALES	65,000	837	19,709	45,291	30%	(29,041)
DIGITAL VIDEO SALES	14,000	588	21,609	(7,609)	154%	11,109
SPONSORSHIPS	10,000	(1,000)	9,000	1,000	90%	1,500
SEMINAR REGISTRATIONS	8,000	-	62,221	(54,221)	778%	56,221
TRIAL ADVOCACY PROGRAM	12,000	(200)	15,928	(3,928)	133%	6,928
TOTAL REVENUE:	**119,800**	**1,425**	**140,405**	**(20,605)**	**117%**	**50,555**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	1,700	-	189	1,512	11%	1,087
STAFF CONFERENCE & TRAINING	250	-	164	86	66%	23
SMALL TOWN AND RURAL COMMITTEE	3,700	-	2,659	1,041	72%	116
PRINTING & COPYING	1,200	-	1,300	(100)	108%	(400)
NEW LAWYER OUTREACH	1,000	-	-	1,000	0%	750
YLL SECTION PROGRAM	1,500	-	545	955	36%	580
WYLC CLE COMPS	1,000	-	-	1,000	0%	750
WYLC OUTREACH EVENTS	1,500	-	250	1,250	17%	875
SPEAKERS & PROGRAM DEVELOP	1,500	-	551	949	37%	574
WYL COMMITTEE	12,000	-	1,178	10,822	10%	7,822
OPEN SECTIONS NIGHT	3,500	-	-	3,500	0%	2,625
TRIAL ADVOCACY EXPENSES	1,500	-	-	1,500	0%	1,125
RECEPTION/FORUM EXPENSE	2,300	-	-	2,300	0%	1,725
WYLC SCHOLARSHIPS/DONATIONS/GRANT	5,000	-	-	5,000	0%	3,750
STAFF MEMBERSHIP DUES	850	-	300	550	35%	338
LENDING LIBRARY	4,000	10	184	3,816	5%	2,816
NMP SPEAKERS & PROGRAM DEVELOPMENT	100	-	-	100	0%	75
TOTAL DIRECT EXPENSES:	**42,600**	**10**	**7,320**	**35,280**	**17%**	**24,630**
INDIRECT EXPENSES:						
SALARY EXPENSE (4.64 FTE)	311,600	25,592	232,205	79,396	75%	1,496
BENEFITS EXPENSE	108,835	9,222	77,874	30,961	72%	3,752
OTHER INDIRECT EXPENSE	143,340	9,046	97,158	46,182	68%	10,347
TOTAL INDIRECT EXPENSES:	**563,775**	**43,860**	**407,237**	**156,538**	**72%**	**15,594**
TOTAL ALL EXPENSES:	**606,375**	**43,870**	**414,557**	**191,818**	**68%**	**40,224**
NET INCOME (LOSS):	**(486,575)**	**(42,445)**	**(274,152)**	**(212,423)**	**56%**	**90,779**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MEMBER WELLNESS PROGRAM						
REVENUE:						
DIVERSIONS	7,500	-	6,000	1,500	80%	375
TOTAL REVENUE:	**7,500**	**-**	**6,000**	**1,500**	**80%**	**375**
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	500	-	226	274	45%	149
MEMBER WELLNESS COUNCIL **	550	-	-	550	0%	413
STAFF CONFERENCE & TRAINING	300	126	401	(101)	134%	(176)
SUBSCRIPTIONS	1,200	110	962	239	80%	(62)
TOTAL DIRECT EXPENSES:	**2,550**	**236**	**1,589**	**961**	**62%**	**324**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.48 FTE)	133,673	10,845	85,522	48,151	64%	14,733
BENEFITS EXPENSE	55,402	4,732	40,268	15,134	73%	1,283
OTHER INDIRECT EXPENSE	45,645	2,896	31,102	14,542	68%	3,131
TOTAL INDIRECT EXPENSES:	**234,719**	**18,473**	**156,892**	**77,827**	**67%**	**19,147**
TOTAL ALL EXPENSES:	**237,269**	**18,710**	**158,481**	**78,788**	**67%**	**19,471**
NET INCOME (LOSS):	**(229,769)**	**(18,710)**	**(152,481)**	**(77,288)**	**66%**	**19,846**

***Budget reallocations apply to this line item. For details, see FY23 Budget Reallocations memo(s) included in the Board of Governors meeting materials.*

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
OFFICE OF THE EXECUTIVE DIRECTOR						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
LEADERSHIP TRAINING	20,000	100	6,160	13,840	31%	8,840
WASHINGTON LEADERSHIP INSTITUTE	80,000	-	-	80,000	0%	60,000
ED TRAVEL & OUTREACH	5,000	-	1,358	3,642	27%	2,392
BAR LEADERS CONFERENCE	12,000	-	8,497	3,503	71%	503
STAFF TRAVEL/PARKING	1,500	198	1,422	78	95%	(297)
STAFF CONFERENCE & TRAINING	8,925	-	7,651	1,274	86%	(957)
STAFF MEMBERSHIP DUES	1,000	840	1,375	(375)	138%	(625)
SURVEY	350	-	681	(331)	195%	(418)
TOTAL DIRECT EXPENSES:	**128,775**	**1,138**	**27,143**	**101,632**	**21%**	**69,438**
INDIRECT EXPENSES:						
SALARY EXPENSE (2.00 FTE)	402,379	33,466	294,747	107,632	73%	7,038
BENEFITS EXPENSE	103,989	8,973	77,074	26,915	74%	917
OTHER INDIRECT EXPENSE	61,891	3,916	42,062	19,829	68%	4,356
TOTAL INDIRECT EXPENSES:	**568,259**	**46,356**	**413,883**	**154,376**	**73%**	**12,311**
TOTAL ALL EXPENSES:	**697,034**	**47,494**	**441,027**	**256,007**	**63%**	**81,749**
NET INCOME (LOSS):	**(697,034)**	**(47,494)**	**(441,027)**	**256,007**	**63%**	**81,749**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

OFFICE OF GENERAL COUNSEL

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
RECORDS REQUEST FEES	963	-	-	963	0%	(722)
TOTAL REVENUE:	**963**	**-**	**-**	**963**	**0%**	**(722)**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	500	-	28	472	6%	347
STAFF MEMBERSHIP DUES	1,150	200	1,250	(100)	109%	(388)
COURT RULES COMMITTEE	1,000	-	-	1,000	0%	750
CUSTODIANSHIPS	8,150	-	199	7,951	2%	5,914
WILLS	2,000	-	-	2,000	0%	1,500
LITIGATION EXPENSES	200	-	-	200	0%	150
DISABILITY ACCOMMODATIONS **	-	158	216	(216)		(216)
STAFF CONFERENCE & TRAINING	6,400	-	2,377	4,023	37%	2,423
TOTAL DIRECT EXPENSES:	**19,400**	**358**	**4,070**	**15,330**	**21%**	**10,480**
INDIRECT EXPENSES:						
SALARY EXPENSE (6.17 FTE)	656,837	45,005	421,990	234,847	64%	70,637
BENEFITS EXPENSE	188,816	16,528	140,710	48,106	75%	902
OTHER INDIRECT EXPENSE	192,481	12,135	130,334	62,147	68%	14,027
TOTAL INDIRECT EXPENSES:	**1,038,134**	**73,668**	**693,034**	**345,100**	**67%**	**85,567**
TOTAL ALL EXPENSES:	**1,057,534**	**74,026**	**697,104**	**360,430**	**66%**	**96,047**
NET INCOME (LOSS):	**(1,056,571)**	**(74,026)**	**(697,104)**	**(359,467)**	**66%**	**95,324**

***Budget reallocations apply to this line item. For details, see FY23 Budget Reallocations memo(s) included in the Board of Governors meeting materials.*

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSE:						
STAFF MEMBERSHIP DUES	100	-	-	100	0%	75
DISCIPLINARY BOARD EXPENSES	4,000	-	-	4,000	0%	3,000
CHIEF HEARING OFFICER	30,000	2,500	22,500	7,500	75%	-
HEARING OFFICER EXPENSES	17,500	-	891	16,609	5%	12,234
HEARING OFFICER TRAINING	400	-	-	400	0%	300
OUTSIDE COUNSEL **	51,500	4,000	36,000	15,500	70%	2,625
TOTAL DIRECT EXPENSES:	**103,500**	**6,500**	**59,391**	**44,109**	**57%**	**18,234**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.40 FTE)	133,790	10,783	101,578	32,211	76%	(1,236)
BENEFITS EXPENSE	40,026	3,430	29,150	10,876	73%	869
OTHER INDIRECT EXPENSE	43,324	2,730	29,325	13,999	68%	3,168
TOTAL INDIRECT EXPENSES:	**217,139**	**16,944**	**160,054**	**57,085**	**74%**	**2,801**
TOTAL ALL EXPENSES:	**320,639**	**23,444**	**219,445**	**101,194**	**68%**	**21,034**
NET INCOME (LOSS):	**(320,639)**	**(23,444)**	**(219,445)**	**(101,194)**	**68%**	**21,034**

***Budget reallocations apply to this line item. For details, see FY23 Budget Reallocations memo(s) included in the Board of Governors meeting materials.*

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PRACTICE OF LAW BOARD						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
PRACTICE OF LAW BOARD	12,000	267	2,220	9,780	19%	6,780
TOTAL DIRECT EXPENSES:	**12,000**	**267**	**2,220**	**9,780**	**19%**	**6,780**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.45 FTE)	35,965	2,905	26,876	9,089	75%	98
BENEFITS EXPENSE	13,465	1,091	9,240	4,224	69%	858
OTHER INDIRECT EXPENSE	13,925	910	9,775	4,150	70%	669
TOTAL INDIRECT EXPENSES:	**63,355**	**4,906**	**45,891**	**17,464**	**72%**	**1,625**
TOTAL ALL EXPENSES:	**75,355**	**5,173**	**48,111**	**27,244**	**64%**	**8,405**
NET INCOME (LOSS):	**(75,355)**	**(5,173)**	**(48,111)**	**(27,244)**	**64%**	**8,405**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PRACTICE MANAGEMENT ASSISTANCE						
REVENUE:						
ROYALTIES	50,000	-	50,166	(166)	100%	12,666
TOTAL REVENUE:	**50,000**	**-**	**50,166**	**(166)**	**100%**	**12,666**
DIRECT EXPENSE:						
STAFF MEMBERSHIP DUES	150	-	150	-	100%	(38)
FASTCASE	73,000	-	72,966	34	100%	(18,216)
STAFF CONFERENCE & TRAINING **	500	-	500	-	100%	(125)
TOTAL DIRECT EXPENSES:	**73,650**	**-**	**73,616**	**34**	**100%**	**(18,379)**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.95 FTE)	80,135	6,449	59,769	20,366	75%	332
BENEFITS EXPENSE	23,499	1,995	16,901	6,599	72%	724
OTHER INDIRECT EXPENSE	29,398	1,848	19,846	9,552	68%	2,202
TOTAL INDIRECT EXPENSES:	**133,033**	**10,292**	**96,516**	**36,517**	**73%**	**3,258**
TOTAL ALL EXPENSES:	**206,683**	**10,292**	**170,133**	**36,550**	**82%**	**(15,120)**
NET INCOME (LOSS):	**(156,683)**	**(10,292)**	**(119,967)**	**(36,716)**	**77%**	**(2,455)**

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Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PROFESSIONAL RESPONSIBILITY PROGRAM						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	750	721	1,075	(325)	143%	(512)
STAFF MEMBERSHIP DUES	500	-	500	-	100%	(125)
CPE COMMITTEE	1,000	97	890	110	89%	(140)
TOTAL DIRECT EXPENSES:	**2,250**	**818**	**2,465**	**(215)**	**110%**	**(778)**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.10 FTE)	91,667	11,133	102,559	(10,893)	112%	(33,809)
BENEFITS EXPENSE	37,219	4,929	42,124	(4,905)	113%	(14,209)
OTHER INDIRECT EXPENSE	22,435	2,151	23,105	(669)	103%	(6,278)
TOTAL INDIRECT EXPENSES:	**151,321**	**18,213**	**167,788**	**(16,466)**	**111%**	**(54,297)**
TOTAL ALL EXPENSES:	**153,571**	**19,031**	**170,253**	**(16,682)**	**111%**	**(55,075)**
NET INCOME (LOSS):	**(153,571)**	**(19,031)**	**(170,253)**	**16,682**	**111%**	**(55,075)**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

PUBLIC SERVICE PROGRAMS

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
DONATIONS & GRANTS	130,000	-	130,000	-	100%	32,500
TOTAL REVENUE:	**130,000**	**-**	**130,000**	**-**	**100%**	**32,500**
DIRECT EXPENSES:						
DONATIONS/SPONSORSHIPS/GRANTS	260,828	-	97,237	163,591	37%	98,384
STAFF TRAVEL/PARKING	1,500	19	19	1,481	1%	1,106
SURVEYS	100	-	-	100	0%	75
PRO BONO & PUBLIC SERVICE COMMITTEE	1,500	-	393	1,107	26%	732
STAFF CONFERENCE & TRAINING	1,000	-	-	1,000	0%	750
PRO BONO CERTIFICATES	2,000	-	457	1,543	23%	1,043
TOTAL DIRECT EXPENSES:	**266,928**	**19**	**98,105**	**168,823**	**37%**	**102,091**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.62 FTE)	128,588	10,196	78,568	50,020	61%	17,873
BENEFITS EXPENSE	40,609	3,485	29,507	11,102	73%	950
OTHER INDIRECT EXPENSE	50,132	3,172	34,065	16,067	68%	3,534
TOTAL INDIRECT EXPENSES:	**219,329**	**16,853**	**142,140**	**77,189**	**65%**	**22,357**
TOTAL ALL EXPENSES:	**486,257**	**16,872**	**240,245**	**246,012**	**49%**	**124,447**
NET INCOME (LOSS):	**(356,257)**	**(16,872)**	**(110,245)**	**(246,012)**	**31%**	**156,947**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

PUBLICATION & DESIGN SERVICES

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF CONFERENCE & TRAINING	350	-	-	350	0%	263
SUBSCRIPTIONS	162	-	100	62	62%	22
IMAGE LIBRARY	4,100	-	4,100	-	100%	(1,025)
TOTAL DIRECT EXPENSES:	**4,612**	**-**	**4,200**	**412**	**91%**	**(741)**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.89 FTE)	72,143	5,852	54,573	17,570	76%	(466)
BENEFITS EXPENSE	19,491	1,630	13,768	5,723	71%	850
OTHER INDIRECT EXPENSE	27,542	1,738	18,661	8,880	68%	1,995
TOTAL INDIRECT EXPENSES:	**119,175**	**9,219**	**87,003**	**32,172**	**73%**	**2,379**
TOTAL ALL EXPENSES:	**123,787**	**9,219**	**91,203**	**32,584**	**74%**	**1,638**
NET INCOME (LOSS):	**(123,787)**	**(9,219)**	**(91,203)**	**(32,584)**	**74%**	**1,638**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

REGULATORY SERVICES FTE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF CONFERENCE & TRAINING	23,550	750	5,865	17,685	25%	11,797
STAFF TRAVEL/PARKING	-	-	168	(168)		(168)
TOTAL DIRECT EXPENSES:	**23,550**	**750**	**6,033**	**17,517**	**26%**	**11,629**
INDIRECT EXPENSES:						
SALARY EXPENSE (2.70 FTE)	349,467	28,187	263,297	86,170	75%	(1,197)
BENEFITS EXPENSE	103,888	9,004	76,909	26,979	74%	1,007
OTHER INDIRECT EXPENSE	83,553	5,268	56,577	26,976	68%	6,088
TOTAL INDIRECT EXPENSES:	**536,908**	**42,459**	**396,783**	**140,125**	**74%**	**5,898**
TOTAL ALL EXPENSES:	**560,458**	**43,209**	**402,816**	**157,642**	**72%**	**17,528**
NET INCOME (LOSS):	**(560,458)**	**(43,209)**	**(402,816)**	**(157,642)**	**72%**	**17,528**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SERVICE CENTER						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	-	396	1,782	(1,782)		(1,782)
TRANSLATION SERVICES	8,200	312	3,417	4,783	42%	2,733
STAFF CONFERENCE & TRAINING	2,100	-	-	2,100	0%	1,575
TOTAL DIRECT EXPENSES:	**10,300**	**708**	**5,199**	**5,101**	**50%**	**2,526**
INDIRECT EXPENSES:						
SALARY EXPENSE (5.71 FTE)	383,690	31,147	292,368	91,322	76%	(4,601)
BENEFITS EXPENSE	142,992	12,486	105,604	37,388	74%	1,640
OTHER INDIRECT EXPENSE	176,699	11,170	119,966	56,732	68%	12,558
TOTAL INDIRECT EXPENSES:	**703,381**	**54,803**	**517,939**	**185,442**	**74%**	**9,597**
TOTAL ALL EXPENSES:	**713,681**	**55,511**	**523,138**	**190,543**	**73%**	**12,123**
NET INCOME (LOSS):	**(713,681)**	**(55,511)**	**(523,138)**	**(190,543)**	**73%**	**12,123**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SECTIONS ADMINISTRATION						
REVENUE:						
REIMBURSEMENTS FROM SECTIONS	290,543	1,077	355,066	(64,523)	122%	137,159
TOTAL REVENUE:	**290,543**	**1,077**	**355,066**	**(64,523)**	**122%**	**137,159**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	750	-	14	736	2%	549
SUBSCRIPTIONS	350	-	331	19	95%	(68)
SECTION/COMMITTEE CHAIR MTGS	1,000	-	456	544	46%	294
DUES STATEMENTS	5,000	-	-	5,000	0%	3,750
STAFF CONFERENCE & TRAINING	500	-	65	435	13%	310
STAFF MEMBERSHIP DUES	250	-	45	205	18%	143
TOTAL DIRECT EXPENSES:	**7,850**	**-**	**911**	**6,939**	**12%**	**4,977**
INDIRECT EXPENSES:						
SALARY EXPENSE (2.58 FTE)	149,581	12,401	112,917	36,663	75%	(732)
BENEFITS EXPENSE	61,326	5,300	44,725	16,601	73%	1,269
OTHER INDIRECT EXPENSE	79,839	5,047	54,207	25,632	68%	5,673
TOTAL INDIRECT EXPENSES:	**290,746**	**22,748**	**211,850**	**78,897**	**73%**	**6,210**
TOTAL ALL EXPENSES:	**298,596**	**22,748**	**212,760**	**85,836**	**71%**	**11,187**
NET INCOME (LOSS):	**(8,053)**	**(21,670)**	**142,306**	**(150,359)**	**-1767%**	**148,346**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SECTIONS OPERATIONS						
REVENUE:						
SECTION DUES	440,225	1,830	565,974	(125,749)	129%	235,805
SEMINAR PROFIT SHARE	147,470	-	-	147,470	0%	(110,603)
INTEREST INCOME	13,120	-	-	13,120	0%	(9,840)
PUBLICATIONS REVENUE	2,000	113	1,142	858	57%	(358)
OTHER	46,880	7,725	19,665	27,215	42%	(15,495)
TOTAL REVENUE:	**649,695**	**9,668**	**586,781**	**62,914**	**90%**	**99,509**
DIRECT EXPENSES:						
DIRECT EXPENSES OF SECTION ACTIVITIES	632,503	31,457	154,241	478,262	24%	320,136
REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES	272,143	1,077	355,066	(82,923)	130%	(150,959)
TOTAL DIRECT EXPENSES:	**904,646**	**32,535**	**509,307**	**395,339**	**56%**	**169,178**
NET INCOME (LOSS):	**(254,951)**	**(22,867)**	**77,474**	**(332,425)**	**-30%**	**268,687**

Washington State Bar Association

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For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
TECHNOLOGY						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	110,000	5,503	94,214	15,786	86%	(11,714)
STAFF TRAVEL/PARKING	2,000	120	350	1,650	18%	1,150
STAFF MEMBERSHIP DUES	450	-	-	450	0%	338
TELEPHONE	95,000	6,323	59,898	35,102	63%	11,352
COMPUTER HARDWARE	65,000	9,984	59,535	5,465	92%	(10,785)
COMPUTER SOFTWARE **	316,525	28,818	168,375	148,150	53%	69,019
HARDWARE SERVICE & WARRANTIES	60,000	-	44,432	15,568	74%	568
SOFTWARE MAINTENANCE & LICENSING	380,000	3,462	299,331	80,669	79%	(14,331)
COMPUTER SUPPLIES	2,000	-	-	2,000	0%	1,500
THIRD PARTY SERVICES	40,000	2,859	28,227	11,773	71%	1,773
STAFF CONFERENCE & TRAINING	10,000	-	-	10,000	0%	7,500
TRANSFER TO INDIRECT EXPENSES	(1,080,975)	(57,069)	(754,362)	(326,613)	70%	(56,370)
TOTAL DIRECT EXPENSES:	-	-	-	-		-
INDIRECT EXPENSES:						
SALARY EXPENSE (13.00 FTE)	1,434,416	115,149	1,055,600	378,817	74%	20,213
BENEFITS EXPENSE	439,894	38,498	328,103	111,791	75%	1,817
CAPITAL LABOR & OVERHEAD	(280,000)	(23,247)	(208,805)	(71,195)	75%	1,195
OTHER INDIRECT EXPENSE	402,292	25,401	272,813	129,479	68%	28,906
TOTAL INDIRECT EXPENSES:	**1,996,602**	**155,801**	**1,447,710**	**548,892**	**73%**	**52,131**
TOTAL ALL EXPENSES:	**1,996,602**	**155,801**	**1,447,710**	**548,892**	**73%**	**52,131**
NET INCOME (LOSS):	**(1,996,602)**	**(155,801)**	**(1,447,710)**	**(548,892)**	**73%**	**49,741**

***Budget reallocations apply to this line item. For details, see FY23 Budget Reallocations memo(s) included in the Board of Governors meeting materials.*

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

VOLUNTEER ENGAGEMENT

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	350	-	498	(148)	142%	(235)
STAFF CONFERENCE & TRAINING	2,500	-	2,450	50	98%	(575)
ABA DELEGATES	15,000	-	4,324	10,676	29%	6,926
TOTAL DIRECT EXPENSES:	**17,850**	**-**	**7,272**	**10,578**	**41%**	**6,115**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.60 FTE)	59,415	4,816	46,878	12,537	79%	(2,317)
BENEFITS EXPENSE	19,657	1,631	13,867	5,790	71%	876
OTHER INDIRECT EXPENSE	18,567	1,186	12,737	5,830	69%	1,188
TOTAL INDIRECT EXPENSES:	**97,639**	**7,633**	**73,482**	**24,157**	**75%**	**(253)**
TOTAL ALL EXPENSES:	**115,489**	**7,633**	**80,754**	**34,735**	**70%**	**(253)**
NET INCOME (LOSS):	**(115,489)**	**(7,633)**	**(80,754)**	**(34,735)**	**70%**	**5,863**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
INDIRECT EXPENSES:						
SALARIES	13,113,765	1,046,851	9,506,763	3,607,002	72%	328,561
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(150,000)
TEMPORARY SALARIES	200,627	27,481	200,766	(139)	100%	(50,296)
CAPITAL LABOR & OVERHEAD	(280,000)	(23,247)	(208,805)	(71,195)	75%	1,195
EMPLOYEE ASSISTANCE PLAN	4,800	-	4,000	800	83%	(400)
EMPLOYEE SERVICE AWARDS	2,038	300	1,670	368	82%	(141)
FICA (EMPLOYER PORTION)	806,675	81,127	691,335	115,340	86%	(86,328)
L&I INSURANCE	62,000	15,385	44,190	17,811	71%	2,311
WA STATE FAMILY MEDICAL LEAVE (EMPLOYI	18,000	2,359	18,518	(518)	103%	(5,018)
MEDICAL (EMPLOYER PORTION)	1,701,951	144,137	1,235,512	466,439	73%	40,952
RETIREMENT (EMPLOYER PORTION)	1,356,286	108,759	967,859	388,427	71%	49,356
TRANSPORTATION ALLOWANCE	65,045	35	32,478	32,567	50%	16,306
UNEMPLOYMENT INSURANCE	65,206	7,054	56,961	8,245	87%	(8,057)
TOTAL SALARY & BENEFITS EXPENSE:	**16,916,394**	**1,410,241**	**12,551,246**	**4,365,147**	**74%**	**138,439**
WORKPLACE BENEFITS	45,980	997	19,158	26,822	42%	15,327
HUMAN RESOURCES POOLED EXP	77,100	3,958	44,066	33,034	57%	13,759
MEETING SUPPORT EXPENSES	10,000	614	4,565	5,435	46%	2,935
RENT	2,131,247	164,968	1,602,055	529,192	75%	(3,619)
MOVE / DOWNSIZE EXPENSES **	31,859	-	4,753	27,106	15%	19,141
PERSONAL PROP TAXES-WSBA	6,650	442	4,070	2,580	61%	917
FURNITURE, MAINT, LH IMP	25,300	215	6,304	18,996	25%	12,671
OFFICE SUPPLIES & EQUIPMENT	18,000	1,804	14,134	3,866	79%	(634)
FURN & OFFICE EQUIP DEPRECIATION **	64,498	4,815	45,116	19,382	70%	3,257
COMPUTER HARDWARE DEPRECIATION	45,354	3,950	31,250	14,104	69%	2,765
COMPUTER SOFTWARE DEPRECIATION **	92,726	3,916	39,723	53,003	43%	29,822
INSURANCE	272,643	22,025	198,227	74,416	73%	6,255
WORK HOME FURNITURE & EQUIP	14,000	692	3,280	10,720	23%	7,220
PROFESSIONAL FEES-AUDIT	50,000	-	30,365	19,635	61%	7,135
PROFESSIONAL FEES-LEGAL **	200,000	8	47,107	152,893	24%	102,893
ONLINE LEGAL RESEARCH **	50,000	1,991	27,797	22,203	56%	9,703
TELEPHONE & INTERNET	33,600	2,452	16,077	17,523	48%	9,123
POSTAGE - GENERAL	24,000	661	9,580	14,420	40%	8,420
RECORDS STORAGE	30,000	2,438	18,045	11,955	60%	4,455
BANK FEES	51,000	2,790	38,107	12,893	75%	143
PRODUCTION MAINTENANCE & SUPPLIES	15,340	(1)	3,991	11,349	26%	7,514
COMPUTER POOLED EXPENSES	1,080,975	57,069	754,362	326,613	70%	56,370
TOTAL OTHER INDIRECT EXPENSES:	**4,370,272**	**275,803**	**2,962,133**	**1,408,139**	**68%**	**315,571**
TOTAL INDIRECT EXPENSES:	**21,286,666**	**1,686,045**	**15,513,380**	**5,773,286**	**73%**	**451,620**

***Budget reallocations have been applied to this line item. For details, see FY23 Budget Reallocations memo(s) included in the Board of Governors meeting materials.*

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2023 to June 30, 2023

75% OF YEAR COMPLETE

SUMMARY PAGE	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE
ACCESS TO JUSTICE	(358,902)	(24,379)	(241,733)	(117,169)
ADMISSIONS/BAR EXAM	56,088	(37,526)	297,464	(241,376)
ADVANCEMENT FTE	(362,565)	(28,931)	(264,013)	(98,552)
BAR NEWS	(93,267)	(5,551)	(84,239)	(9,028)
BOARD OF GOVERNORS	(563,600)	(56,280)	(345,958)	(217,642)
CLE - PRODUCTS	686,086	18,336	573,950	112,136
CLE - SEMINARS	(419,115)	(21,047)	(231,747)	(187,368)
CLIENT PROTECTION FUND	45,788	12,519	670,730	(624,942)
CHARACTER & FITNESS BOARD	(166,623)	(11,218)	(103,306)	(63,317)
COMMUNICATIONS	(787,329)	(73,052)	(521,316)	(266,013)
COMMUNICATIONS FTE	(243,400)	(19,410)	(180,183)	(63,217)
DESKBOOKS	(49,735)	(291)	(84,194)	34,458
DISCIPLINE	(6,095,728)	(486,903)	(4,250,251)	(1,845,477)
DIVERSITY	(235,769)	(12,278)	(47,869)	(187,899)
FINANCE	(1,061,220)	14,923	(164,569)	(896,652)
FOUNDATION	(152,797)	(11,665)	(109,985)	(42,812)
HUMAN RESOURCES	(424,625)	(58,582)	(458,678)	34,053
LAW CLERK PROGRAM	41,201	(9,676)	91,218	(50,017)
LEGISLATIVE	(269,464)	(19,149)	(191,081)	(78,383)
LEGAL LUNCHBOX	(29,617)	5,682	(6,075)	(23,541)
LICENSE FEES	17,053,467	1,393,238	12,702,188	4,351,279
LICENSING AND MEMBERSHIP	(193,762)	(13,880)	(157,096)	(36,666)
LIMITED LICENSE LEGAL TECHNICIAN	(71,026)	(5,899)	(54,790)	(16,236)
LIMITED PRACTICE OFFICERS	74,741	790	71,669	3,071
MANDATORY CLE ADMINISTRATION	343,906	36,962	539,597	(195,691)
MEMBER WELLNESS PROGRAM	(229,769)	(18,710)	(152,481)	(77,288)
MINI CLE	(114,412)	(8,863)	(82,854)	(31,558)
MEMBER SERVICES & ENGAGEMENT	(330,678)	(32,553)	(214,390)	(116,288)
NEW MEMBER EDUCATION	(11,869)	(6,711)	29,168	(41,036)
OFFICE OF GENERAL COUNSEL	(1,056,571)	(74,026)	(697,104)	(359,467)
OFFICE OF THE EXECUTIVE DIRECTOR	(697,034)	(47,494)	(441,027)	(256,007)
OGC-DISCIPLINARY BOARD	(320,639)	(23,444)	(219,445)	(101,194)
PRACTICE OF LAW BOARD	(75,355)	(5,173)	(48,111)	(27,244)
PRACTICE MANAGEMENT ASSISTANCE	(156,683)	(10,292)	(119,967)	(36,716)
PROFESSIONAL RESPONSIBILITY PROGRAM	(153,571)	(19,031)	(170,253)	16,682
PUBLIC SERVICE PROGRAMS	(356,257)	(16,872)	(110,245)	(246,012)
PUBLICATION & DESIGN SERVICES	(123,787)	(9,219)	(91,203)	(32,584)
REGULATORY SERVICES FTE	(560,458)	(43,209)	(402,816)	(157,642)
SECTIONS ADMINISTRATION	(8,053)	(21,670)	142,306	(150,359)
SECTIONS OPERATIONS	(254,951)	(22,867)	77,474	(332,425)
SERVICE CENTER	(713,681)	(55,511)	(523,138)	(190,543)
TECHNOLOGY	(1,996,602)	(155,801)	(1,447,710)	(548,892)
VOLUNTEER EDUCATION	(115,489)	(7,633)	(80,754)	(34,735)
INDIRECT EXPENSES	21,286,666	1,686,045	15,513,380	5,773,286
TOTAL OF ALL	**(20,733,539)**	**(1,693,702)**	**(18,410,561)**	**(2,322,978)**
NET INCOME (LOSS)	**(553,127)**	**7,657**	**2,897,181**	**(3,450,308)**

WASHINGTON STATE
BAR ASSOCIATION

WSBA MISSION

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

WSBA GUIDING PRINCIPLES

The WSBA will operate a well-managed association that supports its members and advances and promotes:

- **Access to the justice system.**
  Focus: Provide training and leverage community partnerships in order to enhance a culture of service for legal professionals to give back to their communities, with a particular focus on services to underserved low and moderate income people.
- **Diversity, equality, and cultural understanding throughout the legal community.**
  Focus: Work to understand the lay of the land of our legal community and provide tools to members and employers in order to enhance the retention of minority legal professionals in our community.
- **The public's understanding of the rule of law and its confidence in the legal system.**
  Focus: Educate youth and adult audiences about the importance of the three branches of government and how they work together.
- **A fair and impartial judiciary.**
- **The ethics, civility, professionalism, and competence of the Bar.**

MISSION FOCUS AREAS	PROGRAM CRITERIA
Ensuring Competent and Qualified Legal Professionals • Cradle to Grave • Regulation and Assistance **Promoting the Role of Legal Professionals in Society** • Service • Professionalism	• Does the Program further either or both of WSBA's mission-focus areas? • Does WSBA have the competency to operate the Program? • As the mandatory bar, how is WSBA uniquely positioned to successfully operate the Program? • Is statewide leadership required in order to achieve the mission of the Program? • Does the Program's design optimize the expenditure of WSBA resources devoted to the Program, including the balance between volunteer and staff involvement, the number of people served, the cost per person, etc?

2016 – 2018 STRATEGIC GOALS

- **Equip members with skills for the changing profession**
- **Promote equitable conditions for members from historically marginalized or underrepresented backgrounds to enter, stay and thrive in the profession**
- **Explore and pursue regulatory innovation and advocate to enhance the public's access to legal services**

GR 12
REGULATION OF THE PRACTICE OF LAW

The Washington Supreme Court has inherent and plenary authority to regulate the practice of law in Washington. The legal profession serves clients, courts, and the public, and has special responsibilities for the quality of justice administered in our legal system. The Court ensures the integrity of the legal profession and protects the public by adopting rules for the regulation of the practice of law and actively supervising persons and entities acting under the Supreme Court's authority.

[Adopted effective September 1, 2017.]

GR 12.1
REGULATORY OBJECTIVES

Legal services providers must be regulated in the public interest. In regulating the practice of law in Washington, the Washington Supreme Court's objectives include: protection of the public; advancement of the administration of justice and the rule of law; meaningful access to justice and information about the law, legal issues, and the civil and criminal justice systems;

(a) transparency regarding the nature and scope of legal services To be provided, the credentials of those who provide them, and the availability of regulatory protections;

(b) delivery of affordable and accessible legal services;

(c) efficient, competent, and ethical delivery of legal services;

(d) protection of privileged and confidential information;

(e) independence of professional judgment;

(f) Accessible civil remedies for negligence and breach of other duties owed, disciplinary sanctions for misconduct, and advancement of appropriate preventive or wellness programs;

(g) Diversity and inclusion among legal services providers and freedom from discrimination for those receiving legal services and in the justice system.

[Adopted effective September 1, 2017.]

GR 12.2
WASHINGTON STATE BAR ASSOCIATION: PURPOSES, AUTHORIZED ACTIVITIES, AND PROHIBITED ACTIVITIES

In the exercise of its inherent and plenary authority to regulate the practice of law in Washington, the Supreme Court authorizes and supervises the Washington State Bar Association's activities. The Washington State Bar Association carries out the administrative responsibilities and functions expressly delegated to it by this rule and other Supreme Court rules and orders enacted or adopted to regulate the practice of law, including the purposes and authorized activities set forth below.

(a) Purposes: In General. In general, the Washington State Bar Association strives to:

(1) Promote independence of the judiciary and the legal profession.

(2) Promote an effective legal system, accessible to all.

(3) Provide services to its members and the public.

(4) Foster and maintain high standards of competence, professionalism, and ethics among its members.

(5) Foster collegiality among its members and goodwill between the legal profession and the public.

(6) Promote diversity and equality in the courts and the legal profession.

(7) Administer admission, regulation, and discipline of its members in a manner that protects the public and respects the rights of the applicant or member.

(8) Administer programs of legal education.

(9) Promote understanding of and respect for our legal system and the law.

(10) Operate a well-managed and financially sound association, with a positive work environment for its employees.

(11) Serve as a statewide voice to the public and to the branches of government on matters relating to these purposes and the activities of the association and the legal profession.

(b) Specific Activities Authorized. In pursuit of these purposes, the Washington State Bar Association may:

(1) Sponsor and maintain committees and sections, whose activities further these purposes;

(2) Support the judiciary in maintaining the integrity and fiscal stability of an independent and effective judicial system;

(3) Provide periodic reviews and recommendations concerning court rules and procedures;

(4) Administer examinations and review applicants' character and fitness to practice law;

(5) Inform and advise its members regarding their ethical obligations;

(6) Administer an effective system of discipline of its members, including receiving and investigating complaints of misconduct by legal professionals, taking and recommending appropriate punitive and remedial measures, and diverting less serious misconduct to alternatives outside the formal discipline system;

(7) Maintain a program, pursuant to court rule, requiring members to submit fee disputes to arbitration;

(8) Maintain a program for mediation of disputes between members and others;

(9) Maintain a program for legal professional practice assistance;

(10) Sponsor, conduct, and assist in producing programs and products of continuing legal education;

(11) Maintain a system for accrediting programs of continuing legal education;

(12) Conduct examinations of legal professionals' trust accounts;

(13) Maintain a fund for client protection in accordance with the Admission and Practice Rules;

(14) Maintain a program for the aid and rehabilitation of impaired members;

(15) Disseminate information about the organization's activities, interests, and positions;

(16) Monitor, report on, and advise public officials about matters of interest to the organization and the legal profession;

(17) Maintain a legislative presence to inform members of new and proposed laws and to inform public officials about the organization's positions and concerns;

(18) Encourage public service by members and support programs providing legal services to those in need;

(19) Maintain and foster programs of public information and education about the law and the legal system;

(20) Provide, sponsor, and participate in services to its members;

(21) Hire and retain employees to facilitate and support its mission, purposes, and activities, including in the organization's discretion, authorizing collective bargaining;

(22) Establish the amount of all license, application, investigation, and other related fees, as well as charges for services provided by the Washington State Bar Association, and collect, allocate, invest, and disburse funds so that its mission, purposes, and activities may be effectively and efficiently discharged. The amount of any license fee is subject to review by the Supreme Court for reasonableness and may be modified by order of the Court if the Court determines that it is not reasonable;

(23) Administer Supreme-Court-created boards in accordance with General Rule 12.3.

(c) Activities Not Authorized. The Washington State Bar Association will not:

(1)) Take positions on issues concerning the politics or social positions of foreign nations;

(2)) Take positions on political or social issues which do not relate to or affect the practice of law or the administration of justice; or

(3) Support or oppose, in an election, candidates for public office.

[Adopted effective July 17, 1987; amended effective December 10, 1993; September 1, 1997; September 1, 2007; September 1, 2013; September 1, 2017.]

GR 12.3
WASHINGTON STATE BAR ASSOCIATION ADMINISTRATION OF SUPREME COURT-CREATED BOARDS AND COMMITTEES

The Supreme Court has delegated to the Washington State Bar Association the authority and responsibility to administer certain boards and committees established by court rule or order. This delegation of authority includes providing and managing staff, overseeing the boards and committees to monitor their compliance with the rules and orders that authorize and regulate them, paying expenses reasonably and necessarily incurred pursuant to a budget approved by the Board of Governors, performing other functions and taking other actions as provided in court rule or order or delegated by the Supreme Court, or taking other actions as are necessary and proper to enable the board or committee to carry out its duties or functions.

[Adopted effective September 1, 2007; amended effective September 1, 2017.]

GR 12.4
WASHINGTON STATE BAR ASSOCIATION ACCESS TO RECORDS

(a) Policy and Purpose. It is the policy of the Washington State Bar Association to facilitate access to Bar records. A presumption of public access exists for Bar records, but public access to Bar records is not absolute and shall be consistent with reasonable expectations of personal privacy, restrictions in statutes, restrictions in court rules, or as provided in court orders or protective orders issued under court rules. Access shall not unduly burden the business of the Bar.

(b) Scope. This rule governs the right of public access to Bar records. This rule applies to the Washington State Bar Association and its subgroups operated by the Bar including the Board of Governors, committees, task forces, commissions, boards, offices, councils, divisions, sections, and departments. This rule also applies to boards and committees under GR 12.3 administered by the Bar. A person or entity entrusted by the
Bar with the storage and maintenance of Bar records is not subject to this rule and may not respond to a request for access to Bar records, absent express written authority from the Bar or separate authority in rule or statute to grant access to the documents.

(c) Definitions.

(1)) "Access" means the ability to view or obtain a copy of a Bar record.

(2)) "Bar record" means any writing containing information relating to the conduct of any Bar function prepared, owned, used, or retained by the Bar regardless of physical form or characteristics. Bar records include only those records in the possession of the Bar and its staff or stored under Bar ownership and control in facilities or servers. Records solely in the possession of hearing officers, non-Bar staff members of boards, committees, task forces, commissions, sections, councils, or divisions that were prepared by the hearing officers or the members and in their sole possession, including private notes and working papers, are not Bar records and are not subject to public access under this rule. Nothing in this rule requires the Bar to create a record that is not currently in possession of the Bar at the time of the request.

(3) "Writing" means handwriting, typewriting, printing, photostating, photographing, and every other means of recording any form of communication or representation in paper, digital, or other format.

(d) Bar Records--Right of Access.

(1) The Bar shall make available for inspection and copying all Bar records, unless the record falls within the specific exemptions of this rule, or any other state statute (including the Public Records Act, chapter 42.56 RCW) or federal statute or rule as they would be applied to a public agency, or is made confidential by the Rules of Professional Conduct, the Rules for Enforcement of Lawyer Conduct, the Admission to Practice Rules and associated regulations, the Rules for Enforcement of Limited Practice Officer Conduct, General Rule 25, court orders or protective orders issued under those rules, or any other state or federal statute or rule. To the extent required to prevent an unreasonable invasion of personal privacy interests or threat to safety or by the above-referenced rules, statutes, or orders, the Bar shall delete identifying details in a manner consistent with those rules, statutes, or orders when it makes available or publishes any Bar record; however, in each case, the justification for the deletion shall be explained in writing.

(2) In addition to exemptions referenced above, the following categories of Bar records are exempt from public access except as may expressly be made public by court rule:

(A) Records of the personnel committee, and personal information in Bar records for employees, appointees, members, or volunteers of the Bar to the extent that disclosure would violate their right to privacy, including home contact information (unless such information is their address of record), Social Security numbers, driver's license numbers, identification or security photographs held in Bar records, and personal data including ethnicity, race, disability status, gender, and sexual orientation. Membership class and status, bar number, dates of admission or licensing, addresses of record, and business telephone
numbers, facsimile numbers, and electronic mail addresses (unless there has been a request that electronic mail addresses not be made public) shall not be exempt, provided that any such information shall be exempt if the Executive Director approves the confidentiality of that information for reasons of personal security or other compelling reason, which approval must be reviewed annually.

(B) Specific information and records regarding

(i) internal policies, guidelines, procedures, or techniques, the disclosure of which would reasonably be expected to compromise the conduct of disciplinary or regulatory functions, investigations, or examinations;

(ii) application, investigation, and hearing or proceeding records relating to lawyer, Limited Practice Officer, or Limited License Legal Technician admissions, licensing, or discipline, or that relate to the work of ELC 2.5 hearing officers, the Board of Bar Examiners, the Character and Fitness Board, the Law Clerk
Board, the Limited Practice Board, the MCLE Board, the Limited License Legal Technician Board, the Practice of Law Board, or the Disciplinary Board in conducting investigations, hearings or proceedings; and

(iii) the work of the Judicial Recommendation Committee and the Hearing Officer selection panel, unless such records are expressly categorized as public information by court rule.

(C) Valuable formulae, designs, drawings, computer source code or object code, and research data created or obtained by the Bar.

(D) Information regarding the infrastructure, integrity, and security of computer and telecommunication networks, databases, and systems.

(E) Applications for licensure by the Bar and annual licensing forms and related records, including applications for license fee hardship waivers and any decision or determinations on the hardship waiver applications.

(F) Requests by members for ethics opinions to the extent that they contain information identifying the member or a party to the inquiry.

Information covered by exemptions will be redacted from the specific records sought. Statistical information not descriptive of any readily identifiable person or persons may be disclosed.

(3) Persons Who Are Subjects of Records.

(A) Unless otherwise required or prohibited by law, the Bar has the option to give notice of any records request to any member or third party whose records would be included in the Bar's response.

(B) Any person who is named in a record, or to whom a record specifically pertains, may present information opposing the disclosure to the applicable decision maker.

(C) If the Bar decides to allow access to a requested record, a person who is named in that record, or to whom the records specifically pertains, has a right to initiate review or to participate as a party to any review initiated by a requester. The deadlines that apply to a requester apply as well to a person who is a subject of a record.

(e) Bar Records--Procedures for Access.

(1) General Procedures. The Bar Executive Director shall appoint a Bar staff member to serve as the public records officer to whom all records requests shall be submitted. Records requests must be in writing and delivered to the Bar public records officer, who shall respond to such requests within 30 days of receipt. The Washington State Bar Association must implement this rule and adopt and publish on its website the public records officer's work mailing address, telephone number, fax number, and e-mail address, and the procedures and fee schedules for accepting and responding to records requests by the effective date of this rule. The Bar shall acknowledge receipt of the request within 14 days of receipt, and shall communicate with the requester as necessary to clarify any ambiguities as to the records being requested. Records requests shall not be directed to other Bar staff or to volunteers serving on boards, committees, task forces, commissions, sections, councils, or divisions.

(2) Charging of Fees.

(A) A fee may not be charged to view Bar records.

(B) A fee may be charged for the photocopying or scanning of Bar records according to the fee schedule established by the Bar and published on its web site.

(C) A fee not to exceed $30 per hour may be charged for research services required to fulfill a request taking longer than one hour. The fee shall be assessed from the second hour onward.

(f) Extraordinary Requests Limited by Resource Constraints. If a particular request is of a magnitude or burden on resources that the Bar cannot fully comply within 30 days due to constraints on time, resources, and personnel, the Bar shall communicate this information to the requester along with a good faith estimate of the time needed to complete the Bar's response. The Bar must attempt to reach

agreement with the requester as to narrowing the request to a more manageable scope and as to a timeframe for the Bar's response, which may include a schedule of installment responses. If the Bar and requester are unable to reach agreement, the Bar shall respond to the extent practicable, clarify how and why the response differs from the request, and inform the requester that it has completed its response.

(g) Denials. Denials must be in writing and shall identify the applicable exemptions or other bases for denial as well as a written summary of the procedures under which the requesting party may seek further review.

(h) Review of Records Decisions.

(1) Internal Review. A person who objects to a record decision or other action by the Bar's public records officer may request review by the Bar's Executive Director.

(A) A record requester's petition for internal review must be submitted within 90 days of the Bar's public records officer's decision, on such form as the Bar shall designate and make available.

(B) The review proceeding is informal, summary, and on the record.

(C) The review proceeding shall be held within five working days. If that is not reasonably possible, then within five working days the review shall be scheduled for the earliest practical date.

(2) External Review. A person who objects to a records review decision by the Bar's Executive Director may request review by the Records Request Appeals Officer (RRAO) for the Bar.

(A) The requesting party's request for review of the Executive Director's decision must be deposited in the mail and postmarked or delivered to the Bar not later than 30 days after the issuance of the decision, and must be on such form as the Bar shall designate and make available.

(B)) The review will be informal and summary, but in the sole discretion of the RRAO may include the submission of briefs no more than 20 pages long and of oral arguments no more than 15 minutes long.

(C) Decisions of the RRAO are final unless, within 30 days of the issuance of the decision, a request for discretionary review of the decision is filed with the Supreme Court. If review is granted, review is conducted by the Chief Justice of the Washington Supreme Court or his or her designee in accordance with procedures established by the Supreme Court. A designee of the Chief Justice shall be a current or former elected judge. The review proceeding shall be on the record, without additional briefing or argument unless such is ordered by the Chief Justice or his or her designee.

(D) The RRAO shall be appointed by the Board of Governors. The Bar may reimburse the RRAO for all necessary and reasonable expenses incurred in the completion of these duties, and may provide compensation for the time necessary for these reviews at a level established by the Board of Governors.

(i) Monetary Awards Not Allowed. Attorney fees, costs, civil penalties, or fines may not be awarded under this rule.

(j) Effective Date of Rule.

(1) This rule goes into effect on July 1, 2014, and applies to records that are created on or after that date.

(2) Public access to records that are created before that date are to be analyzed according to other court rules, applicable statutes, and the common law balancing test; the Public Records Act, chapter 42.56 RCW, does not apply to such Bar records, but it may be used for nonbinding guidance.

[Adopted effective July 1, 2014; amended effective September 1, 2017.]

GR 12.5
IMMUNITY

All boards, committees, or other entities, and their members and personnel, and all personnel and employees of the Washington State Bar Association, acting on behalf of the Supreme Court under the Admission and Practice Rules, the Rules for Enforcement of Lawyer Conduct, or the disciplinary rules for limited practice officers and limited license legal technicians, shall enjoy quasi-judicial immunity if the Supreme Court would have immunity in performing the same functions.

[Adopted effective January 2, 2008; amended effective September 1, 2017.]

WASHINGTON STATE BAR ASSOCIATION

2022-2023
WSBA BOARD OF GOVERNORS MEETING SCHEDULE

MEETING DATE	LOCATION	POTENTIAL ISSUES / SOCIAL FUNCTION	AGENDA ITEMS DUE FOR EXEC COMMITTEE MTG	EXECUTIVE COMMITTEE MTG 8:00 am - 9:30 am	BOARD BOOK MATERIALS DEADLINE
October 22, 2022	Virtual Meeting	Goal Setting Retreat	n/a	n/a	n/a
November 5, 2022	Hotel Bellwether Bellingham, WA	BOG Meeting Team Building Retreat Nov. 4	September 30, 2022	October 7, 2022	October 17, 2022
January 13-14, 2023	WSBA Conference Center Seattle, WA	BOG Meeting MLK Luncheon Jan. 13	December 5, 2022	December 12, 2022	December 27, 2022
March 3-4, 2023	Supreme Court Temporary Facility Tumwater, WA Heritage Room Olympia, WA	Meeting w/Supreme Court Mar. 3 Budget and Audit Retreat Mar. 3 BOG Meeting	January 20, 2023	January 27, 2023	February 13, 2023
May 19-20, 2023	Hilton Garden Inn Yakima, WA	BOG Meeting	March 31, 2023	April 7, 2023	April 17, 2023
June 23-24, 2023	Heathman Lodge Vancouver, WA	BOG Meeting Mid-Year Retreat Jun. 22	May 19, 2023	May 24, 2023	June 5, 2023
August 11-12, 2023	Courtyard Columbia Point Richland, WA	BOG Meeting	July 7, 2023	July 14, 2023	July 24, 2023
September 8-9. 2023	Historic Davenport Hotel Spokane, WA	BOG Meeting	August 7, 2023	August 14, 2023	August 21, 2023

The Board Book Material Deadline is the final due date for submission of materials for the respective Board meeting. Please notify the Executive Director's office in advance of possible late materials. Refer to policy 1305 BOG Action Procedure on how to bring agenda items to the Board. This information can be found online at: https://www.wsba.org/about-wsba/who-we-are/board-of-governors

WSBA Board of Governors
Congressional District Map

2022-2023


Dan Clark
President


Hunter Abell
President-Elect


Brian Tollefson
Immediate Past President


Francis Adewale
Treasurer


Terra Nevitt
Executive Director & Secretary

BRITISH COLUMBIA


Kari Petrasek
Governor District 2


Sunitha Anjilvel
Governor District 1


Francis Adewale
Governor District 5


Brett Purtzer
Governor District 6


Matthew Dresden
Governor District 7-North


Erik Kaeding
Governor District 8


Serena Sayani
Governor District 7-South


Kevin Fay
Governor District 9


Nam Nguyen
Governor District 10


Mary Rathbone
Governor District 4


Lauren Boyd
Governor District 3


Jordan Couch
Governor At-Large


Alec Stephens
Governor At-Large


Brent Williams-Ruth
Governor At-Large

Blaine
Bellingham
San Juan
Anacortes
Island
Port Angeles
Clallam
Jefferson
Seattle
Bellevue
Mason
Tacoma
Grays Harbor
Hoquiam
Aberdeen
Olympia
Thurston
Pierce
Raymond
South Bend
Pacific
Centralia
Lewis
Wahkiakum
Longview
Skamania
Clark
Vancouver
Kittitas
Ellensburg
Yakima
Yakima
Klickitat
Oroville
Okanogan
Omak
Republic
Pend Oreille
Newport
Grand Coulee
Chelan
Wenatchee
Ephrata
Grant
Moses Lake
Coulee City
Wilbur
Lincoln
Spokane
Spokane Valley
Spokane
Ritzville
Adams
Whitman
Colfax
Pullman
Garfield
Clarkston
Dayton
Columbia
Asotin
Walla Walla
Walla Walla
Franklin
Benton
Richland
Kennewick
Pasco
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10
PACIFIC OCEAN
IDAHO
OREGON

BASIC CHARACTERISTICS OF MOTIONS

From: ***The Complete Idiot's Guide to Robert's Rules***
The Guerilla Guide to Robert's Rules

MOTION	PURPOSE	INTERRUPT SPEAKER?	SECOND NEEDED?	DEBATABLE?	AMENDABLE?	VOTE NEEDED
1. Fix the time to which to adjourn	Sets the time for a continued meeting	No	Yes	No[1]	Yes	Majority
2. Adjourn	Closes the meeting	No	Yes	No	No	Majority
3. Recess	Establishes a brief break	No	Yes	No[2]	Yes	Majority
4. Raise a Question of Privilege	Asks urgent question regarding to rights	Yes	No	No	No	Rules by Chair
5. Call for orders of the day	Requires that the meeting follow the agenda	Yes	No	No	No	One member
6. Lay on the table	Puts the motion aside for later consideration	No	Yes	No	No	Majority
7. Previous question	Ends debate and moves directly to the vote	No	Yes	No	No	Two-thirds
8. Limit or extend limits of debate	Changes the debate limits	No	Yes	No	Yes	Two-thirds
9. Postpone to a certain time	Puts off the motion to a specific time	No	Yes	Yes	Yes	Majority[3]
10. Commit or refer	Refers the motion to a committee	No	Yes	Yes	Yes	Majority
11. Amend an amendment (secondary amendment)	Proposes a change to an amendments	No	Yes	Yes[4]	No	Majority
12. Amend a motion or resolution (primary amendment)	Proposes a change to a main motion	No	Yes	Yes[4]	Yes	Majority
13. Postpone indefinitely	Kills the motion	No	Yes	Yes	No	Majority
14. Main motion	Brings business before the assembly	No	Yes	Yes	Yes	Majority

1 Is debatable when another meeting is scheduled for the same or next day, or if the motion is made while no question Is pending

2 Unless no question is pending

3 Majority, unless it makes question a special order

4 If the motion it is being applied to is debatable

Discussion Protocols
Board of Governors Meetings

Philosophical Statement:

"We take serious our representational responsibilities and will try to inform ourselves on the subject matter before us by contact with constituents, stakeholders, WSBA staff and committees when possible and appropriate. In all deliberations and actions we will be courageous and keep in mind the need to represent and lead our membership and safeguard the public. In our actions, we will be mindful of both the call to action and the constraints placed upon the WSBA by GR 12 and other standards."

Governor's Commitments:

1. Tackle the problems presented; don't make up new ones.
2. Keep perspective on long-term goals.
3. Actively listen to understand the issues and perspective of others before making the final decision or lobbying for an absolute.
4. Respect the speaker, the input and the Board's decision.
5. Collect your thoughts and speak to the point – sparingly!
6. Foster interpersonal relationships between Board members outside Board events.
7. Listen and be courteous to speakers.
8. Speak only if you can shed light on the subject, don't be repetitive.
9. Consider, respect and trust committee work but exercise the Board's obligation to establish policy and insure that the committee work is consistent with that policy and the Board's responsibility to the WSBA's mission.
10. Seek the best decision through quality discussion and ample time (listen, don't make assumptions, avoid sidebars, speak frankly, allow time before and during meetings to discuss important matters).
11. Don't repeat points already made.
12. Everyone should have a chance to weigh in on discussion topics before persons are given a second opportunity.
13. No governor should commit the board to actions, opinions, or projects without consultation with the whole Board.
14. Use caution with e-mail: it can be a useful tool for debating, but e-mail is not confidential and does not easily involve all interests.
15. Maintain the strict confidentiality of executive session discussions and matters.

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BOARD OF GOVERNORS

WSBA VALUES

Through a collaborative process, the WSBA Board of Governors and Staff have identified these core values that shall be considered by the Board, Staff, and WSBA volunteers (collectively, the "WSBA Community") in all that we do.

To serve the public and our members and to promote justice, the WSBA Community values the following:

- Trust and respect between and among Board, Staff, Volunteers, Members, and the public
- Open and effective communication
- Individual responsibility, initiative, and creativity
- Teamwork and cooperation
- Ethical and moral principles
- Quality customer-service, with member and public focus
- Confidentiality, where required
- Diversity and inclusion
- Organizational history, knowledge, and context
- Open exchanges of information

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BOARD OF GOVERNORS

GUIDING COMMUNICATION PRINCIPLES

In each communication, I will assume the good intent of my fellow colleagues; earnestly and actively listen; encourage the expression of and seek to affirm the value of their differing perspectives, even where I may disagree; share my ideas and thoughts with compassion, clarity, and where appropriate confidentiality; and commit myself to the unwavering recognition, appreciation, and celebration of the humanity, skills, and talents that each of my fellow colleagues bring in the spirt and effort to work for the mission of the WSBA. Therefore, I commit myself to operating with the following norms:

- I will treat each person with courtesy and respect, valuing each individual.
- I will strive to be nonjudgmental, open-minded, and receptive to the ideas of others.
- I will assume the good intent of others.
- I will speak in ways that encourage others to speak.
- I will respect others' time, workload, and priorities.
- I will aspire to be honest and open in all communications.
- I will aim for clarity; be complete, yet concise.
- I will practice "active" listening and ask questions if I don't understand.
- I will use the appropriate communication method (face-to-face, email, phone, voicemail) for the message and situation.
- When dealing with material of a sensitive or confidential nature, I will seek and confirm that there is mutual agreement to the ground rules of confidentiality at the outset of the communication.
- I will avoid triangulation and go directly to the person with whom I need to communicate. (If there is a problem, I will go to the source for resolution rather than discussing it with or complaining to others.)
- I will focus on reaching understanding and finding solutions to problems.
- I will be mindful of information that affects, or might be of interest or value to, others, and pass it along; err on the side of over-communication.
- I will maintain a sense of perspective and respectful humor.

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BOARD OF GOVERNORS

Anthony David Gipe
President

phone: 206.386.4721
e-mail: adgipeWSBA@gmail.com

November 2014

BEST PRACTICES AND EXPECTATIONS

- **Attributes of the Board**
  - Competence
  - Respect
  - Trust
  - Commitment
  - Humor

- **Accountability by Individual Governors**
  - Assume Good Intent
  - Participation/Preparation
  - Communication
  - Relevancy and Reporting

- **Team of Professionals**
  - Foster an atmosphere of teamwork
    - Between Board Members
    - The Board with the Officers
    - The Board and Officers with the Staff
    - The Board, Officers, and Staff with the Volunteers

  - We all have common loyalty to the success of WSBA

- **Work Hard and Have Fun Doing It**

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