



**WSBA SECTION ANNUAL REPORT – FY17**

**Deadline: Friday, October 13, 2017**

**Email Annual Report to: [sections@wsba.org](mailto:sections@wsba.org)**

<b>Name of the Section:</b>	<i>Real Property, Probate and Trust Section</i>	
<b>Chair:</b>	<i>RoseMary Reed (2017-18)</i>	
<b>Section Information:</b>  <i>*To be completed by WSBA*</i>	Membership Size:	2,422 (as of 9/1/17)
	Staff Lead:	Julianne Unite
	BOG Liaison:	Kim Risenmay
	FY17 revenue: \$	\$83,008.26 (as of 8/31/17)
	FY17 direct expenses: \$ <i>(does not include the Per-Member-Charge)</i>	\$38,923.29 (as of 8/31/17)
<b>Purpose:</b>	<p>The purpose of the Section is to:</p> <ul style="list-style-type: none"> <li>a. assist our members in achieving the highest standards of competence, professionalism, and ethics in their practices,</li> <li>b. assist the Legislature in the enactment and improvement of the laws affecting real property, probate, trusts, and estates and to assist the Judiciary in the just administration of those laws,</li> <li>c. support the WSBA with regard to those matters which concern the practice of law in the areas of real property, probate, trusts and estates, and</li> <li>d. otherwise serve our members by helping them realize their professional goals.</li> </ul>	
<b>2016-2017 Accomplishments and Work in Progress:</b>	<p>RPPT experienced a rocky start to the 2016-2017 year coming off the Section Policy Workgroup where RPPT had expended a great deal of time and effort. However, as the year progressed, RPPT was able to return to more normal operations and focus on providing member benefits.</p>	

	<p>RPPT welcomed its first fellows (6/2016), selected an additional fellow (6/2017), co-sponsored four (4) full day CLEs and its annual Midyear Conference at the Marcus Whitman in Walla Walla. We published four (4) high-quality newsletters. A member of the RPPT executive committee received training to offer web-based CLEs for the Section. We enjoyed a strong relationship with our BOG Liaison, Kim Risenmay, who attended nearly all of our executive committee meetings. At WSBA's request, we revised RPPT's bylaws to be consistent with WSBA's revised bylaws. RPPT has made an effort to have a representative attend each of the BOG meetings the past year. RPPT was active in commenting on the expansion of the LLLT license into the probate, elder law and healthcare arenas. RPPT formed a sub-committee to investigate reinstating a State-wide, all Sections Convention with the goal of increasing collegiality between the sections and WSBA membership.</p>	
<p><b>Please quantify your section's current member benefits:</b></p> <p><i>For example:</i></p> <ul style="list-style-type: none"> <li>• \$3000 Scholarships, donations, grants awarded;</li> <li>• 4 mini-CLEs produced</li> </ul>	<p><b>Quantity</b></p>	<p><b>Member Benefit</b></p>
	<p><b>\$12,850*</b></p>	<p>Scholarships, donations, grants awarded *Amount authorized, \$5,468 used (through 8/2017)</p>
	<p><b>2</b></p>	<p>Law school outreach events/benefits hosted</p>
	<p><b>50+</b></p>	<p>Legislative bills reviewed/drafted</p>
	<p><b>4</b></p>	<p>Newsletters produced</p>
	<p><b>0</b></p>	<p>Mini-CLEs produced</p>
	<p><b>5</b></p>	<p>Co-sponsored half/day to multi-day CLEs with WSBA</p>
	<p><b>0</b></p>	<p>Receptions/forums hosted</p>
	<p><b>1</b></p>	<p>Awards given</p>
	<p><b>4</b></p>	<p>New Lawyer Outreach events/benefits</p>
	<p><b>3</b></p>	<p>Other (please describe): website and two list-servs</p>
<p><b>2017-2018 Goals &amp; Priorities (Top 5)</b></p>	<p><b>1</b></p>	<p>Expand scholarships to RPPT Midyear Conference to at least 4 recipients (2 scholarships awarded in 2017, the first year of this program)</p>
	<p><b>2</b></p>	<p>Continue Fellows program and have all 4 Fellow positions filled (including 2 terms that expire Sept. 30, 2018)</p>

	<b>3</b>	Research feasibility and complete initial planning stages of a State-wide, all Sections Convention to occur in 2020
	<b>4</b>	Strategic planning regarding most effective way to deliver CLEs to our members, including forms based/hands on training
	<b>5</b>	Continue efforts at increasing the diversity of RPPT Section members and leadership

**Please report how this section is addressing diversity:**

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

Diversity is an important issue to RPPT but we acknowledge that it is difficult to maintain diversity within RPPT when the profession as a whole is rather homogeneous. When recruiting individuals to serve on the RPPT executive committee and/or join the Section, RPPT makes significant efforts to be inclusive. As a result of these efforts RPPT is doing very well in maintaining diversity in areas it can control: gender, age, small firm/large firm, geography. As to gender equity, RPPT has done a great job. All officers of RPPT were women this past year and the executive committee has had good gender balance for more than a decade. RPPT still struggles with ethnic diversity as this is more difficult barrier to cross. In the past, the RPPT invited Robin Nussbaum, the diversity coordinator at WSBA, to provide training to RPPT leadership and the training was well received. RPPT reached out to WSBA in the Spring of 2017 to discuss additional training, but did not hear back from WSBA.

**Please report how this section is addressing professionalism:**

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

RPPT was an active participant in the Section's Workgroup and worked hard to keep the work of that committee professional and productive.

RPPT has also formed a sub-committee to investigate reinstating a State-wide, all Sections Convention with the goal of increasing collegiality between the sections and WSBA membership. RPPT has authorized the use of \$3,000 of Section funds to determine the feasibility and scope of the convention as well as do the initial program development and investigate sponsorship opportunities. The subcommittee intends to enlist the assistance of other Section leaders so that this effort will be a multi-Section effort.

**Please report how this section is integrating new and young lawyers into its work:**

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

RPPT has three fellows (two on the probate and trust council and one on the real property council) and a Young Lawyer Liaison (on the real property council). The involvement of our young lawyers benefits RPPT by allowing the Section to learn first-hand about issues important to young lawyers. We believe the fellows and liaison benefit by obtaining experience necessary to lead RPPT and WSBA in the future. We provided two scholarships for tuition to the Midyear Conference to young lawyers at the Young Lawyer's Open Section Nights (one in Seattle and one in Spokane). We also provided two full "all expenses paid" scholarships for which young lawyers who applied to attend our Midyear Conference. RPPT has invested heavily in young lawyers in the last year, and we are beginning to feel the benefits of that investment.

**Please describe your Executive Committee's relationship with WSBA staff and the Board of Governors.**

*For example:*

- *Quality of WSBA staff support/services provided to Section Executive Committee*
- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support services to sections.*

We work closely with and receive excellent service from WSBA staff. Our relationship over the past year with Section staff has been as strong as we have experienced in a number of years. We work well with Julianne Unite. She is responsive and helpful. Ms. Unite has been able to attend nearly all of our executive committee meetings.

We have appointed a small subcommittee whose responsibility is to attend BOG meetings. Previously, we had a different person attend meetings periodically. We found that it was a challenge keeping abreast of BOG issues. Having a smaller group of people attend allows for continuity without placing too much burden on any one individual.

Kim Risenmay, as our BOG liaison, has been wonderful. He has made a point to attend our executive committee meetings and to have open and candid conversations with RPPT leadership.

We have thoroughly enjoyed working with Sondra Livingston-Carr and Kevin Plachy for CLE planning and delivery. Both are abundantly competent and extraordinarily responsive to our requests for assistance in planning CLE locations, content, pricing, coordination of staff and on-site delivery.

We attend the sections leaders' meetings that are held throughout the year.

We are committed to a relationship of mutual respect with WSBA. We will strive to assist WSBA in meeting its objectives and appreciate that WSBA offers support and the flexibility we need to continue to provide the high quality member services our members have come to expect.

**Note:** Annual Reports will be provided to the WSBA Executive Director, Board of Governors and posted on your section's webpage. We encourage you to share the Annual Report with your BOG liaison and section membership.

Reports are scheduled to be included in the November 2017 BOG Meeting Materials.

**Return by October 13, 2017 to [sections@wsba.org](mailto:sections@wsba.org)**