



WSBA Sections

Annual Report 2014- 2015

(October 1, 2014 – September 30, 2015)

Deadline: Wednesday, September 30, 2015
Email to: sections@wsba.org

Submission Information

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| Section | Senior Lawyers |
| Submitted by | Carole Grayson, chair, in consultation with Executive Committee members |
| Role on Executive Committee | Chair, 2014-15 |
| Date | September 10, 2015. 8:30 pm |

Year in Review

Q1. Please describe highlights and accomplishments from 2014-2015 (limit to 5):

Categories to consider:

- Member outreach events – e.g., member forums, receptions and law student activities
- Educational events and products, including CLE seminar; new lawyer education seminar; midyear or annual conferences; brown bag sessions; newsletters; etc.
- Legislative participation
- Scholarship and/or grant programs
- Pro bono, access to justice and/or civil legal services activities
- A special recognition of section and/or section member(s)

1. The Executive Committee (“EC”) held nine monthly meetings to discuss issues relevant to the members of the Senior Lawyers Section. As in prior years, the EC did not meet in July, August, and December.

2. The Section held another successful Annual Meeting and CLE on May 1 at the Sea-Tac Marriott, with some 140 in attendance. MCLE approved the seminar for 7.0 CLE credits, including 1.0 ethics credit. The conference theme, "Reaching New Highs", featured relevant presentations by notable speakers that appealed to the broad base that distinguishes our section membership:

Past WSBA president Salvador Mungia provided an overview of our new marijuana laws, conflicts of laws, state v. local preemption and predictions together with ethical issues concerning attorneys.

Thomas Hillier II discussed the need for sentencing reform as a necessary tool to address the exploding increase in imprisonment in the United States.

Professor Thomas Andrews of the University of Washington gave an update on community property laws for

persons in committed intimate relationships, same-sex marriage, and registered domestic partnerships. William Neukom addressed the realities of being corporate counsel and challenges in advising a growing business.

Justice Mary Yu of the Washington State Supreme Court presented a well-documented report concerning transitions in the WSBA and her suggestions on opportunities for creating legacies.

George Tamblin and Dieter Struzyna provided insights on the virtual law firm, including transitioning thereto.

Meridith Childers and David Tarshes discussed scams aimed at senior citizens and loan modification scams.

Karen Klein addressed the legal risks and rewards of social media.

J. Donald Curran’s talk on avoiding ethical issues as you age provided our one hour ethics credit.

3. The EC is discussing opportunities for interaction with other sections, especially the Small & Solo Practice Section, and other efforts to broaden compliance with our section bylaws, including informal mentoring of younger lawyers.

4. The EC is keenly interested in sponsoring at least a couple mini-CLEs with emphasis on Central and Eastern Washington. Progress was made on this goal this last year

5. The EC is interested in developing more programs of benefit to senior lawyers.

Q2. Please quantify your section’s current member benefits:

For example:

- \$3000 Scholarships, donations, grants awarded;
- 4 Mini-CLEs produced

| Quantity | Member Benefit |
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| \$ | Scholarships, donations, grants awarded |
| | Law school outreach events/benefits hosted |
| | Legislative bills reviewed/drafted |
| 3 | Newsletters produced |
| 1 | Mini-CLEs produced |
| 1 | Co-sponsored half-day to multi-day CLEs with WSBA |
| 1 | Receptions/forums hosted at annual luncheon |
| | Awards given |
| | New Lawyer Outreach events/benefits |

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| 2 | <p>Other (please describe):</p> <p>a. Interaction with Small and Solo Practice Section: The Senior Lawyers' Section collaborated with the Solo and Small Practice Section to jointly present a free mini-CLE to members of the sections on "How to Use Casemaker." Representatives of the sections met by phone several times to develop the topic, parameters, and mechanics of the conference. Our section provided the physical locations and food for socializing after the webinar. The SSPS provided the content speaker. Both groups publicized through their respective list-servs. Here is the email registrants received:</p> <p style="text-align: center;">Welcome to the How To Use Casemaker Webinar</p> <p>When you click on the link below, you will be taken to the registration page for the Webinar. After completing the registration page, you will be connected to the Webinar which will run from 4 PM to 5 PM on Tuesday, April 21st. There is a chat feature if you want to ask questions of the speaker, Jim Corbett.</p> <p style="text-align: center;">https://www.fuzemeeting.com/webinar/register/1067750</p> <p>Although the mini-CLE's content was great, members logging on at the scheduled time encountered technical glitches. The webinar provided a walk-through of the tools available in the Casemaker software and a "how to" tutorial by the speaker. Apparently many who wanted to attend never were able to listen to the speaker, either because of technical difficulties or because they missed the registration deadline. Nonetheless, the topic was very popular and valuable to Bar members of both groups.</p> <p>b. Interaction with our liaison from Young Lawyers Committee to brainstorm ways we can help them and they can help us</p> |
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Q3. In May 2013, the WSBA adopted the [Diversity and Inclusion Plan](#). Describe how your section's Executive Committee has approached incorporating the main tenets of this plan into your section's activities and efforts. Please address all of the following:

- *What steps has the Executive Committee taken to review and implement the diversity and inclusion plan in the section's activities?*
The Senior Lawyers Section leadership makes it a point to be aware of the plan and to implement it in every way that we can, including diversity on our Executive Committee
- *What strengths or challenges has your section identified in pursuit of inclusivity?*
No challenges. We are cognizant of the plan and seek to be inclusive in every way possible.
- *In what ways did the section utilize the services of the WSBA Diversity Specialist?*
The WSBA staffer would be a welcome addition on our agenda at a forthcoming meeting. The section has not thus far utilized this person's services.
- *Who from your Executive Committee can the WSBA Diversity Specialist contact regarding diversity and inclusion?*
The chair of the Executive Committee.
- *If this was not a focus for your leadership in the past year, how does the Executive Committee plan to work toward these goals over the next year?*

We continue to strive to incorporate the main tenets of the plan in all our activities.

Q4. In July 2014, the WSBA adopted the [Professionalism Plan](#). Describe how your section's Executive Committee has approached incorporating the main tenets of this plan into your section's activities and efforts. If this was not a focus for your leadership in the past year, how does the Executive Committee plan to work toward these goals over the next year?

The Senior Lawyers Section has not formally addressed this plan. However, as senior members of the Bar, we believe that we incorporate the tenets of professionalism in our activities. Our longevity as practitioners provides resonance to our perspective on the intrinsic importance of "ethics, civility, professionalism, and competence" as defining aspects of the legal profession, as per the Professionalism Plan. We will take a closer look at the plan this coming year.

Q5. 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*

The executive committee of the Senior Lawyers Section wishes we could say that we were pleased with all staff support/services provided by WSBA during 2014-15. This is not the case.

Positive:

The diligence, responsiveness, and organizational knowledge of our section liaison, Julianne Unite, and her predecessor, Kiley Thornton, should be the norm for all WSBA staff who interact with section leaders, other bar leaders, and "ordinary" individual lawyers.

Our assigned BOG liaison, Brad Furlong of Mt. Vernon, has been very responsive to our inquiries and concerns. He regularly attends our EC meetings in person or by phone.

Eleanor Doermann, our first-ever liaison from the Young Lawyers Committee, regularly attends our meetings. As a newer practitioner who is also 55+, she provides an invaluable perspective.

Ken Yu, the long-time publisher of our section's newsletter, "Life Begins", is unfailingly prompt and helpful.

Negative:

According to the WSBA website, "WSBA|CLE provides high-quality continuing legal education programs and products that promote learning, enhance skills, and inspire high standards of practice. The Senior Lawyers Section did not receive the "high-quality" promised by the WSBA.

WSBA's fiscal year is October 1 – September 30. Our section's annual report addresses our May 2015 CLE and preliminary planning for our May 2016 CLE. Our annual CLE is by far our section's largest activity, in terms of time expended in planning and revenue derived, and thus the EC's greatest focus.

2015 CLE: Numerous errors or oversights by assigned WSBA staff affected our 2015 CLE. Ongoing failures by WSBA staff on a timely basis to solicit sponsorships for several months from prior sponsors and potential sponsors who had indicated interest in underwriting our annual CLE hurt our budget. Repeated faulty publication of the CLE notice to WSBA members stating our CLE was sponsored by the Elder Law Section, even when ultimately remedied, had an impact. The cover page of our CLE coursebook failed to identify one of our two keynote speakers. One presenter has mentioned encountering several problems: She timely provided WSBA with her powerpoint and twice sent her bio. However, the CLE coursebook did not include her bio, and WSBA was unable to adjust the format of her powerpoint, which had been formatted in default mode, e.g., for widescreen. The presenter only learned during her presentation that the venue had “normal”, not wide screen, capabilities. She would have provided a “normal” screen version had she been notified in advance.

In June 2015, section chair Carole Grayson, prior section chair Steve DeForest, and section treasurer Ron Thompson met with WSBA executive director Paula Littlewood and WSBA president Anthony Gipe about our concerns. As of September 10, WSBA has not responded to our concerns.

2016 CLE: The latter months covered in this annual report overlap with our EC’s preliminary efforts to plan our 2016 CLE. Our EC hopes WSBA staff’s oversights from last year’s CLE do not recur for our 2016 CLE. Current indications are not hopeful. Since late June, the EC has been hoping to review potential venues for the 2016 CLE. Some EC members directly contacted potential venues and provided information to WSBA staff. Staff may have had information on other venues as well. As of September 10, despite requests, WSBA staff has not provided the information sought (venues, AV, food & beverage, etc.). On August 13, staff had said it would provide the requested information in a week. The availability of venues can change rapidly, and so can bids. Tempus fugit. Time is of the essence.

How WSBA can “continue to strengthen/support services to Sections”

Expect all staff to be responsive, timely, proactive, and transparent when interacting with section leaders. When responsibilities are shifted to another unit, the staff formerly assigned should promptly communicate this change to section leadership and assure that the section’s requested actions have been communicated to the newly assigned unit. Carrying out this communication by email introducing all the involved units and section leaders is a simple way to accomplish this.

Update as necessary the “Functional Organizational Chart” from May 2013 that appears on WSBA’s website.

Provide section leadership with a chart that includes contact information and assigned responsibilities for all WSBA staff involved in planning the programmatic and financial aspects of CLEs. Communicate all changes to section leadership.

Provide age information so our section leadership can communicate with lawyers who turn 50. This will assist our section’s outreach efforts to increase our membership.

The EC of the Senior Lawyers Section hopes WSBA is open to our suggestions and concerns and cooperates at all levels in a mutual desire to increase the effectiveness of our section and WSBA units.

Q6. Please provide specific examples of how your section’s activities aligned with the following WSBA strategic goals this past year:

Prepare and equip members with

Our annual CLE is our greatest achievement. Its wide range of

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| problem-solving skills for the changing profession. | presentations provides practical tools for all stages of the attendees' careers. |
| Foster community with and among members and the public. | We have little real direct contact with the public as a Section. However, the learning experience obtained through our annual CLE must be helpful as an outreach. |
| Promote equitable conditions for members from historically underrepresented backgrounds to enter, stay and thrive in the profession. | This has not been emphasized by us as a Section except as to the extent that we seek such diversity among our EC. Our aging demographic reflects the "whiter", more male constituency that characterized the legal profession from its earliest days. We expect the eventual retirement of our members to yield a section demographic that more reflects the changing demographic of the profession. |
| Support member transitions across the life of their practice. | We continue to make this an item of interest in our annual CLE. We appreciate the MLCE Board's approval of this area for credit. |

| Planning for the Future | |
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| <i>Q7. Please describe your section's top 5 priorities for the upcoming membership year 2015-2016, including any goals for membership growth, educational priorities, member benefits, public benefits, etc.:</i> | |
| 1. Fiscal: Plan and present a meaningful, well attended, and well-underwritten Spring 2015 CLE. Be responsive and proactive in communicating with BOG concerning measures under BOG consideration that would tend to jeopardize the fiscal solidity of our section. Such measures might include but are not limited to any that would eliminate cost-sharing of section CLE programming. | |
| 2. Increase section membership. According to our bylaws, lawyers of any age or experience can join our section; only members of the executive committee are subject to the age and experience requirement: 55+ years old and/or 25 years of experience. Continue to review whether our name inhibits section growth. | |
| 3. Increase our outreach to other sections or committees for opportunities to use their resources to serve our members, and vice versa | |
| 4. Discuss and schedule meaningful mini-CLEs and social gatherings with emphasis in Central and Eastern Washington. | |
| 5. Meaningful participation in our Section for and with our fellow lawyers in Central and Eastern Washington. | |

Thank you for completing your section's annual report. Please feel free to add additional thoughts and comments below:

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

Reminders: The next BOG meeting is **September 17-18, 2015** at the WSBA Conference Center.

Please submit by Wednesday, September 30th
Thank You!