

# WASHINGTON STATE BAR ASSOCIATION

## WSBA ENTITY ANNUAL REPORT FORM

FY 2023: October 1, 2022 – September 30, 2023

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards<sup>1</sup>), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year FY2023 (October 1, 2022 – September 30, 2023). Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and the staff liaison.

**Submission Deadline is Friday, October 13:** please submit by emailing [barleaders@wsba.org](mailto:barleaders@wsba.org) or requesting that your staff liaison submit the report internally.

<b>Name of Entity:</b>	Solo and Small Practice Section
<b>Entity Size:</b> <i>Total Number of Entity/Section Executive Committee Positions</i>	10
<b>Chair or Co-Chairs:</b>	Jordan Couch (incoming Darcel Lobo)
<b>Staff Liaison:</b> <i>Include name, job title, and department if known</i>	Carolyn MacGregor
<b>Board of Governors Liaison(s):</b>	Jordan Couch Kari Petrasek
<b>Purpose of Entity:</b> <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
	<i>To help solo and small practice attorneys ethically conduct a profitable, satisfying business by acting as a clearing house for qualified law practice management and technology information.</i>
<b>Strategy to Fulfill Purpose:</b>	
	Through online resources, educational materials, networking events and mentoring opportunities

October 1, 2022 – September 30, 2023 (FY23)

How does the entity’s purpose help further the mission of the WSBA “to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice”?

*Our CLE’s help lawyers run the business end of their practices ethically and efficiently which in turn fosters better relations with other counsel and the courts. In particular, effective use of technology helps lawyers meet their obligations, manage trust accounts and manage communications with clients and opposing counsel. On our list-serve, members frequently solicit advice and share experiences regarding legal issues and how to deal with opposing counsel, courts and staff.*

**2022-2023 Entity Accomplishments:**

Completed 9 CLEs for members. Maintained our membership close to 1000 members, which in turn enhances the value of our list serve. We exceeded our budget projections with our mini-CLE’s. Produced the Solo & Small Firm Conference in partnership with WSBA and sponsored a reception and a networking event. Continually enhanced content on our WSBA web pages. Hosted a couple member events. Initiated process to create a book of tips for solo and small firm practitioners. Solicited new engagement by getting members involved in Executive Committee subcommittees.

**Looking Ahead: 2023-2024 Top Goals & Priorities:**

<b>1</b>	Finalize book of tips for solo lawyers.
<b>2</b>	<b>Continue to help restore the annual WSBA Solo &amp; Small Firm Conference into the premier solo and small firm networking event it was before</b>
<b>3</b>	To continually help our members improve their law firms and well-being
<b>4</b>	Click or tap here to enter text.
<b>5</b>	Click or tap here to enter text.

**Please describe how this entity is addressing diversity, equity, and inclusion:**

*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 committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive, and eventually lead the profession? Other?*

***Our membership is as diverse as WSBA membership. We recruit minorities to serve on the EC. We also plan to invite some minority bar associations to provide liaisons to our EC. Note: At least three of our existing EC members are also members of minority bar associations. Diversity is always one of our goals when selecting speakers for our CLE and webinars.***

**Please share feedback regarding the support and engagement provided by WSBA.**

*For example:*

- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison(s)*
- *Ideas you have for ways WSBA can continue to strengthen/support your entity.*

Click or tap here to enter text.		
<b>SECTIONS ONLY: Please quantify your section's 2022-2023 member benefits:</b>  <i>For example:</i> <ul style="list-style-type: none"> <li>• \$3000 Scholarships, donations, grants awarded;</li> <li>• 4 mini-CLEs produced</li> </ul>	Click or tap here to enter text.	Newsletters/publications produced
	9	Mini-CLEs produced
	1	Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA
	Click or tap here to enter text.	Co-sponsored half-day, full-day and/or multi-day CLE seminars with <i>non</i> -WSBA entity
	1	Receptions/forums hosted or co-hosted
	10 (through discounts for CLE)	Scholarships, Donations, & Grants
	1	New Lawyer Outreach events/benefits
	Click or tap here to enter text.	Other (please describe): Click or tap here to enter text.
<b>SECTIONS ONLY: Please quantify your section's 2022-2023 legislative activity.</b>	Click or tap here to enter text.	Bills Reviewed
	Click or tap here to enter text.	Bills tracked
	Click or tap here to enter text.	Comments proposed
	Click or tap here to enter text.	Bills proposed/drafted
<b>Entity Detail Report: To Be Completed by WSBA Staff</b>		
<b>Number of Entity Members/Section Executive Committee Members:</b>		12
<b>Number of Section Members:</b> <i>As of September 1, 2023. Note: The Section Membership year runs on the calendar year.</i>		882

<b>Number of Applicants for FY24 Positions:</b> <i>October 1, 2023 – September 30, 2024</i>	4
<b>Do you have vacant positions for the coming year, FY24?</b>	No
<b>FY23 Budgeted Direct Expenses:</b> <i>As of September 30, 2023.</i> <i>For Sections, this does not include the Per-Member-Charge.</i>	<b>\$40,554</b>
<b>FY23 Total Direct Expenses:</b> <i>Draft estimate as of Dec. 1, 2023</i> <i>For Sections, this does not include the Per-Member-Charge.</i>	<b>\$26,575</b>

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<sup>i</sup> Supreme Court Boards (Access to Justice Board, Disciplinary Board, LLLT Board, Limited Practice Board, MCLE Board and Practice of Law Board) provide annual reports to WSBA to support its responsibility under [GR 12.3](#), to provide oversight and monitor compliance with applicable rules and orders. Boards have the option to use the WSBA template or to share their annual reports to the Washington Supreme Court.