



ANNUAL SPRING SECTION LEADERS MEETING

Wrapping up FY2023 and Planning for FY2024: Budgeting and Programming

Monday, April 24, 2023
2:00 p.m. – 3:30 p.m.

WELCOME AND PLAN FOR THE DAY

- 50 years of WSBA Sections/Sections Team Updates
- FY24 Budget Planning
- Working with WSBA CLE
- Open Dialogue
- Closing Remarks & Adjourn

Carolyn MacGregor, *Sections Program Specialist*



50 YEARS OF WSBA SECTIONS/SECTIONS TEAM UPDATES

Carolyn MacGregor, Sections Program Specialist

Noah Baetge, Sections Program Coordinator

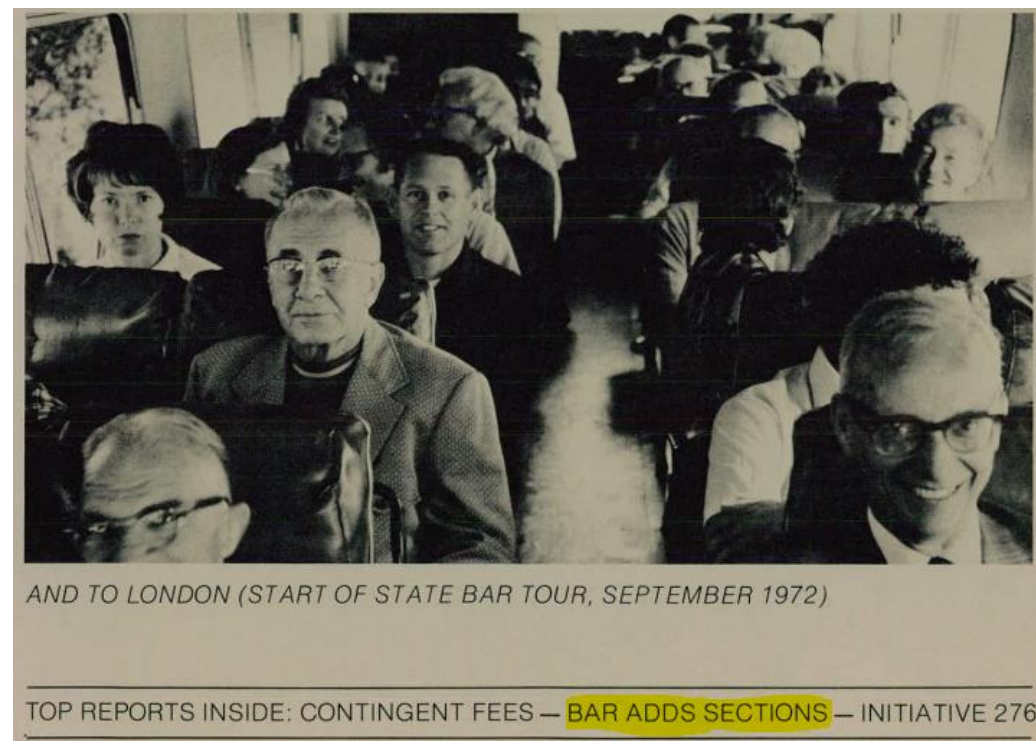
*Chelle Gegax, Member Services and Engagement (MSE)
Administrative Assistant*

*Julianne Unite, Member Services and Engagement (MSE)
Manager*



CONGRATULATIONS WSBA SECTIONS ON 50 YEARS OF SERVING YOUR MEMBERS!

(1973-2023)



WSBA SECTIONS 50TH ANNIVERSARY TRIVIA

The WSBA currently has how many sections? **29**

Which of the following is an actual former name for the Sections Bulletin? **SectionLand**

What year did the WSBA BOG approve the creation of Sections? **1973**

How many sections did the BOG approve that year? **12**

Which of the following ***was not*** one of the original 12 sections upon the creation of sections by the BOG in February 1973?
Labor and Employment Law

Which of these sections ***was*** one of the original 12 sections? **Environmental and Land Use Law**

How many signatures are required for the BOG to consider the creation of a new section? **150**

What are the major functions of the WSBA Sections?

Networking, a seasoned voice for the Legislative Process, CLE offerings, Reason to party!

Of the 45,000 lawyers that make up the WSBA's membership, how many are members of sections (approx.)? **9,000**

Thank you for playing!

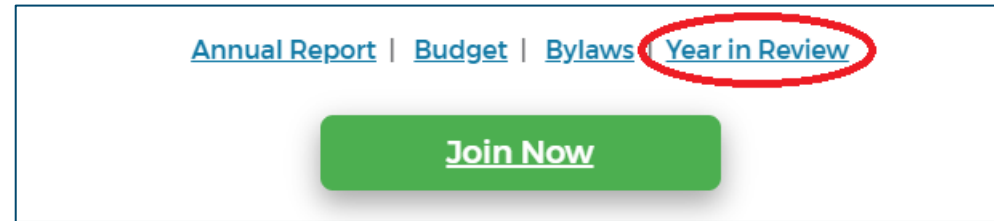
ELECTIONS

- Nominating committees reviewing applications*
- Candidate slate form due May 15*
- Ballots finalized by May 30*
- Voting begins June 5*
- Final results sent to section chairs by July 7

**Some sections are following an alternate timeline*

YEAR-IN-REVIEW INFOSHEETS

- Available now via link on each section webpage



- Content taken from FY22 section annual reports
- Designed as tool for section publicity/member recruitment

ADDING PAGE NAVIGATION TO SECTION WEBPAGES

- Page navigation anchor links will be added to each section's webpage

[Annual Report](#) | [Budget](#) | [Bylaws](#) | [Year in Review](#)

[Join Now](#)

Page Navigation

The World Peace Through Law Section offers many resources for members. Click the following links to learn more.

- [Upcoming Programs](#)
- [Past Programs](#)
- [Section Elections](#)
- [Executive Committee](#)
- [Executive Committee Meetings](#)
- [Visit Our LinkedIn Group](#)
- [Join Our Section](#)

2023 Spring Sect Meeting

Date: April 24, 2023
Time: 2:00 PM - 3:30 PM
Location: Zoom Meeting
Call-In:
LOCAL OPTION: (206) 462-1000
TOLL-FREE OPTION: 1-800-541-0099
Access Code:
Meeting ID: 856 412 3456
Passcode: 505297

ELUL Annual Spr Networking Even

Washington Law

LIST SERVE CLEAN UP

- Purpose: Ensure current section members are subscribed to WSBA administered section list serves
- Draft Communication and Implementation Plan
 - Notification to Section Leaders –Early May
 - Notification to Section Members –Mid May
 - Clean-up – Late May to Early June

YOUNG LAWYER LIAISON TO SECTIONS

FY24 YLL recruiting has begun. Eligible sections were sent a kickoff announcement and the YLL Checklist on April 11.

- Section Checklist submission deadline: May 10, 2023
- Applications available to YLL candidates: May 25, 2023
- Application deadline: June 27, 2023
- Section's YLL selections due: August 10, 2023
- FY24 YLL Orientation: September 25, 2023

QUESTIONS?

FY2024 BUDGET PLANNING

Maggie Yu, Controller



FISCAL YEAR (FY) 2024 BUDGET SCHEDULE

- ▶ **May 1:** Budget materials sent to Section Leaders
- ▶ **May 1 – July 3:** Sections Leaders complete budget materials
- ▶ **June 26:** Budget Process Drop-In Calls
- ▶ **July 3:** Deadline for Sections to submit budget worksheet and dues change request
- ▶ **July 21:** WSBA Budget & Audit (B&A) Committee meeting reviews draft Section budgets
- ▶ **July 7 – 30:** Staff review of section budget request and follow up
- ▶ **August 18:** Final draft of FY24 budget worksheets due
- ▶ **August 25:** B&A reviews final FY24 Section Budgets
- ▶ **September 8 – 9:** WSBA Board of Governors approves budget

DOCUMENTS

- ▶ **Items for Submission:**
 - ▶ FY24 Section Budget Request Worksheet
 - ▶ Request to Change Member Dues
- ▶ **Informational Items:**
 - ▶ Section Membership Dues History
 - ▶ Section Membership Count History
 - ▶ Section Fiscal Policies
 - ▶ FY24 Per-Member Charge Calculation

All materials distributed on May 1st

ITEMS FOR SUBMISSION

1. FY24 Section Budget Request Worksheet

- ▶ Sample request worksheet included in meeting materials
- ▶ Worksheet includes:
 - 2020 – 2023 YTD budget and actual financial information
 - FY 2024 Budget column for Section leaders to input dollar amounts
 - “Narrative” column to be filled out by Section explaining the purpose of the funds and any calculations or additional information to support the FY 2024 budget figure

2. Request to Change Member Dues

- ▶ Only needed if planning a change to member dues for FY 2024

Both items due by July 3, 2023

INFORMATIONAL ITEMS

1. Section Membership Dues History

- Document shows the membership dues for each section for the past 5 years (2019-2023)

2. Section Membership Count History

- Document shows the membership counts for your section over the past 5 years as well as the year-to-date count (2019-2023)

3. Section Fiscal Policies

- Provides information about WSBA's guidelines for section financial activity
- Fund balance guidelines:
 - Section fund balance should be enough to sustain a consistent level of programming in the event there are severe fluctuations in annual section membership (six months' worth of direct programming expenses are recommended as a guideline)
 - Sections are discouraged from maintaining fund balances in excess of two years' worth of direct programming expenses and specified purposes

INFORMATIONAL ITEMS

4. FY24 Per-Member Charge Calculation

- The FY24 Per-Member Charge is scheduled to be reviewed and approved by the Budget & Audit Committee at their April 28th meeting.
- A detailed breakdown of the calculation behind the charge will be distributed along with the other budget materials on **May 1st**.

5. Section Split Cover Memo (if applicable)

QUESTIONS?

If you have any questions or need assistance with your budget, please reach out to your Sections Team or the Finance Team.

sectionbudgets@wsba.org

WORKING WITH WSBA CLE

Kevin Plachy, Director of Advancement
Shanthi Raghu, Education Programs Manager



AGENDA

- Welcome & Introductions
- WSBA CLE Portfolios
- Section Partnership
- Program Options
- Questions



WELCOME & INTRODUCTIONS



THE PARTNERSHIP

Sections are a critical partner in developing and delivering valuable continuing legal education programming for the members of the bar.

WSBA CLE is invested in your success, and as a partner, looks to continually reflect and improve our ability to deliver quality and relevant content to advance the legal profession.

WSBA-CLE

WSBA-CLE is a self-sustaining program

- *Section CLEs*
- *Mini-CLEs*
- WSBA Presents
- New Member Education
- Legal Lunchbox
- Regulatory Programming

PROGRAM OPTIONS



Section CLEs (half, full, multi-day)

Mini-CLEs

COMPARISON



	Half/Full/Multi-Day	Minis
Cost to Section	\$0	Accreditation: \$12 Webinar Tool: \$100 Venue/Food, etc.: TBD
Net Revenue	Split per fiscal policy over three years	Section retains all revenue
Attendee Options	Live: in person and webcast On demand	Live: in person and/or webinar
Credits	3 credits or more	2 credits or fewer
Tuition	Half-Day: \$159 Full-Day: \$275 Multi-Day: \$399 *option for section member pricing	\$35 or less
Program logistics	WSBA	Section
Timeline	6 months or more depending on program	Logistics confirmed by 6 weeks

HALF/FULL/MULTI-DAY



HALF-DAY, FULL-DAY AND MULTI-DAY CLES

During budgeting, note your plans pertaining to CLEs for that fiscal year in the narrative section

- **6 months out**
 - WSBA Staff will reach out to start planning
 - Develop topic and theme
 - Recruit Faculty
- **3 months to program date**
 - Education Programs Lead works with Chairs and Faculty to develop, market and deliver program, supporting aspects leading up to and day of.

FINANCIALS

Gross Live Revenue

+

Gross On Demand Revenue

*recorded products on
WSBA-CLE Store for 3 years*

-

Direct Live Costs

*venue, food, webcasting, volunteer
reimbursements etc.*

+

Indirect Live Costs

staff, overhead

Direct On Demand Costs

hardware, online hosting

Indirect On Demand Costs

staff, overhead

=

**Up to \$8,000: 50% to
section**

**After \$8,000: 35% to
Section**

MINI-CLE



MINI-CLE SEMINARS

- Section member benefit
- Up to 2.0 CLE credits
- Up to \$35.00 tuition
- Low cost to section
- Section keeps any revenue
- MCLE requirements apply
- Section managed with WSBA staff support

MINI-CLE TIMELINE

- **6 months out:** Upon section's request, WSBA adds hold to calendar up to six months ahead
- **6-8 weeks out:** Completed Event Form must be submitted at least six weeks prior to program.
- WSBA-CLE sets up registration, serves as the accreditation sponsor, email marketing, and reports CLE credits to MCLE within 30 days of the seminar

ADDITIONAL REFERENCES

[Section Mini-CLE Programming \(wsba.org\)](#)

[CLE Revenue Sharing Fiscal Policy](#)

WE WANT TO HEAR FROM YOU!

QUESTIONS?

OPEN DIALOGUE



CLOSING REMARKS & ADJOURN





Image credit: WSBA Celebrates National Volunteer Week April 18 - 24, 2021

Thank you!

Sections are partners in promoting the WSBA's mission to serve the public and the members of the Bar, to ensure the integrity of the legal profession, and to champion justice.

