

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Board of Bar Examiners (BOBE)
Chair	Bruce Turcott
Vice Chair:	Cathy Helman
Staff Liaison:	Ramana Pendyala, Admissions Manager
Board of Governors Liaison:	Allison Widney
Purpose of Entity:	
The Board of Bar Examiners (BOBE) has two purposes: it grades the Multistate Essay Examination (MEE) and Multistate Performance Test (MPT) portions of the Uniform Bar Exam (UBE), and it produces the content for the Washington Law Component (WLC) test. The Board has no oversight over LLLT and/or LPO exams. The BOBE's authority stems from the Admission and Practice Rules (APR) adopted by the Washington Supreme Court. APR 2(a)(1), 4(a), 4(d).	
Strategy to Fulfill Purpose:	
The grading of the MEE and MPT is typically completed over the course of one long weekend (in March and August, respectively, for the winter and summer exams). The winter exam requires a total of 10 examiners and the summer exam requires a total of 18 examiners. Prior to grading any exams, each examiner must attend the mandatory scheduled NCBE grading workshop, either in person, by teleconference, or by reviewing the conference video. The WLC test is reviewed and updated by members of the BOBE every other year. BOBE leadership, working with bar staff, aims to maintain a sufficient pool of trained bar examiners to fairly and efficiently grade the essay portions of the winter and summer bar exams and update the WLC test to reflect current law.	

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<p>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"?</p>	
<p>The BOBE facilitates and ensures accurate grading of the essay portions of the Uniform Bar Exam for the purpose of admission to practice law, to serve the bar, the public, and test takers.</p>	
<p>2023-2024 Entity Accomplishments:</p>	
<p>BOBE members graded the winter 2024 and summer 2024 exams in person at the WSBA office. Grading was completed accurately and on time for both exams. A total of 1038 exams were graded together for both winter and summer exams. Appointing new members to the Board has been an ongoing process and from October 2023 until now, the Board has appointed 12 new members. We have a total of 43 members on the Board currently.</p>	
<p>The Board Chair and Vice Chair, along with Staff Liaison and WSBA Volunteer Engagement Advisor, have been working closely with NCBE on recruiting graders to participate in the October field test administration of the NextGen Bar Exam.</p>	
<p>The Board Vice Chair has been nominated to serve on the Pathways to Licensure Steering Committee.</p>	
<p>Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities: <i>SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.</i> <i>SMART Goals are: Specific, Measurable, Relevant and Time-Bound</i></p>	
1	Recruit 5-6 bar examiners so that the Board will be comprised of 50 members. Conduct training for new members and provide refresher training for continuing members.
2	Complete the review of Washington Law Component in the fall of 2024 and make it available for applicants in January 2025.
<p>Looking Ahead: <i>Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.</i></p>	
1	Collaborate with NCBE and stakeholders and continue to participate in discussions relating to the NextGen Bar Exam.
<p>Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?</i></p>	
<p>Staff Liaison is working with the WSBA DEI team to schedule a DEI training for new and returning members. Increasing the diversity of graders is a top goal & priority for the Board.</p>	
<p>Please share feedback regarding the support and engagement provided by WSBA.</p>	
<p>The BOG Liaison and Staff Liaison have been working on the recruitment efforts along with the Chair and Vice Chair.</p>	

Entity Detail & Demographics Report:
To Be Completed by WSBA Volunteer Engagement Advisor

Size of Entity: <i>(Include voting and non-voting members)</i>	Currently 45 members; 50 maximum
Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i>	7
Number of Applicants for FY25: <i>Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i>	14
Budgeted Direct Expenses: <i>As of September 30, 2024.</i>	\$39,000
Indirect Expenses: <i>As of September 30, 2024.</i>	\$14,574

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.

Disability	No	91%
	Yes	7%
	Chose Not to Respond	2%
District*	0	4%
	1	7%
	2	2%
	4	2%
	5	20%
	6	11%
	7N	9%
	7S	11%
	8	4%
	9	14%
	10	16%
Ethnicity	Asian – East Asian	4%
	Asian – South Asian	4%
	Hispanic or Latinx	4%
	Middle Eastern Descent	2%
	White or European Descent	86%
Gender	Female	49%

	Male	51%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	7%
	Heterosexual	82%
	Chose Not to Respond	11%
<p>The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.</p>		

ⁱ 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.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT FORM

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 FY2024 (October 1, 2023 – September 30, 2024). 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.

Name of Entity:	Character and Fitness Board (CFB)
Entity Size:	12
Chair or Co-Chairs:	Adam Yanasak
Staff Liaison:	Lisa Amatangel, Associate Director, OGC; Emily Crane, Paralegal II, OGC
Board of Governors Liaison(s):	Mary Rathbone
Purpose of Entity:	
The Character and Fitness Board (CFB) derives its authority from the Washington Supreme Court under APR 20 - 25.6, most recently amended in 2016. The CFB conducts hearings upon referral from Regulatory Services Counsel to determine: (1) if applicants to take the Bar Examination (or waiving in from another jurisdiction or transferring their UBE score; or members seeking to transfer from inactive to active) have demonstrated current good moral character and fitness to be admitted or re-admitted to the practice of law, or (2) have met the requirements to be reinstated after disbarment.	
Strategy to Fulfill Purpose:	
Upon referral from Bar Counsel after review of application materials and supplemental information, the CFB conducts hearings, prepares written findings, and makes recommendations to the Washington Supreme Court (who makes the final decisions on all October 1, 2023 – September 30, 2024 (FY24) admission/licensing recommendations). By conducting hearings, observing and questioning witnesses, and reviewing voluminous materials, the CFB assesses the credibility of applicants and witnesses and thus serves as a critical fact-finding body on behalf of the Supreme	

October 1, 2023 – September 30, 2024 (FY24)

Court. The CFB meets as frequently as necessary, generally meeting one day a month. Hearings are generally scheduled to last one-half to one day, and the CFB may complete up to two hearings in one meeting.

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"?

The public, members of the Bar, and the integrity of the legal profession are directly impacted by the character and fitness of persons admitted to the practice of law in this state. Attempting to ensure applicants are of current good moral character and have the fitness to practice law serves a direct public protection function to the benefit of the public, the members of the Bar, and the legal profession as a whole. By Court rule, the CFB has three public members that serve on it. The CFB's public members have an active role in the hearings and deliberations and assist with written findings and recommendations. Their input and participation are invaluable.

2023-2024 Entity Accomplishments:

- *Goal 1:* Continue to conduct hearings as necessary, completing all written findings and recommendations in a timely fashion.
- Accomplishment: The Board convened for annual orientation and implicit bias training and attended all scheduled hearings (two in this fiscal year).
- *Goal 2:* Continue to provide diversity and anti-bias training for consideration and reference when conducting all hearings during the year.
- Accomplishment: This was successfully completed during the first CFB meeting.
- *Goal 3:* Continue recruiting efforts to fill open positions.
- Accomplishment: The Board onboarded three new members to open positions, including two public members.
- *Goal 4:* Continue to assess/refine the execution of in-person/hybrid hearings.
- Accomplishment: The Board has successfully returned to in-person/hybrid meetings.

Looking Ahead: 2024-2025 Top Goals & Priorities:

- | | |
|----------|---|
| 1 | Continue to conduct hearings as necessary, completing all written findings and recommendations in a timely fashion. |
| 2 | Participate in WSBA Regulatory School, including diversity and anti-bias training for consideration and reference when conducting all hearings during the year. |
| 3 | Continue recruiting efforts to fill open positions. |
| 4 | Continue to assess/refine the execution of in-person/hybrid hearings. |

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?

The CFB's makeup is governed by Court rule (APR 23(a)). The members of the CFB come from each congressional district, a wide variety of practice areas and settings, and a variety of ethnic, racial,

gender, sexual orientation, disability, and other diversity factors, and therefore represent broad geographic, practice, and experiential diversity. The Board also includes community representatives, and it can include additional members from each Congressional district (which occurs sometimes in order to include additional members from historically underrepresented backgrounds). The Chair encourages discussion and invites input from all members, and the CFB works cooperatively, even when there are significant disagreements in particular cases; diversity of viewpoints is paramount to the deliberative process.

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

WSBA counsel and paralegal have been very professional and responsive to concerns of the Board and ensure that it operates effectively and efficiently. Continued support from WSBA volunteer coordinator and staff is necessary for recruitment.

**Entity Detail & Demographics Report:
To Be Completed by WSBA Staff**

Size of Entity:
(include voting and non-voting members)

12

Number of Vacancies for FY25:
The number of positions with terms beginning October 1, 2024 (FY25)

4

Number of Applicants for FY25:
Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)

12

Budgeted Direct Expenses:
*As of September 30, 2024.
For Sections, this does not include the Per-Member-Charge.*

\$18,000

FY23 Indirect Expenses:
As of September 30, 2024.

\$86,637

FY23 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily, and individuals had the option to not respond to any or all of the factors below.

Disability	No	92%
	Yes	8%
	Chose Not to Respond	0%
District*	0	25%
	2	17%

	3	8%
	5	8%
	6	8%
	7S	17%
	8	8%
	10	8%
Ethnicity	Black, African American, African Descent	8%
	White, European Descent	82%
	Chose Not to Respond	0%
Gender	Female	75%
	Male	25%
	Chose Not to Respond	0%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	17%
	Heterosexual	66%
	Chose Not to Respond	17%

The Yes/No response for the Sexual Orientation category is data from a previous demographic question 'Do you openly identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?' This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

ⁱ 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.

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Name of Entity:	CLE Committee
Chair or Co-Chairs:	Chair Noah Williams (FY24)
Staff Liaison:	Shanthi Raghu, Education Programs Manager
Board of Governors Liaison:	Governor Nam Nguyen
Purpose of Entity:	
The purpose of the Continuing Legal Education (CLE) Committee is to support the Washington State Bar Association's (WSBA) development of continuing legal educational programming that ensures competent and qualified legal professionals, supports member transitions throughout the life of their practice, and helps to prepare members for the future with skills required for the 21st century practice of law	
Strategy to Fulfill Purpose:	
The CLE Committee provides input to the WSBA CLE Team in fulfilling its mission of serving the ongoing education needs of Washington legal professionals and works actively with the WSBA CLE Team to brainstorm ideas for new CLE content and assist in identifying qualified speakers and chairs.	
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"?	
The CLE Committee continues to address the mission of the WSBA by supporting the development of timely and relevant legal education. Content developed by WSBA CLE promotes both professional and personal development - in turn aiding in ensuring the integrity of the legal profession.	

October 1, 2023 – September 30, 2024 (FY24)

2023-2024 Entity Accomplishments:	
Helped guide WSBA CLE in programming areas	
Brainstormed new topics for FY24 and FY25	
Supported the development of new programs including Supply Chain Issues and Disputes, Litigation Tech, Personal Injury Basics	
Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities: <i>SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.</i> <i>SMART Goals are: Specific, Measurable, Relevant and Time-Bound</i>	
1	Consult with other WSBA committees on CLE programming and priorities.
2	Identify programming areas that are not addressed by other WSBA committees.
3	Continue to create and promote useful CLE programs.
Looking Ahead: <i>Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.</i>	
1	Increase CLE committee membership
Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?</i>	
The CLE Committee itself is comprised of several members from diverse backgrounds. Additionally, the CLE Committee is committed to helping the WSBA CLE staff provide programming to Bar members on the topic of equity, inclusion and the mitigation of bias, including offering free CLEs on this topic, and discussed potential topics to bring forward to the membership	
Entity Detail & Demographics Report: <i>To Be Completed by WSBA Volunteer Engagement Advisor</i>	
Size of Entity: <i>(Include voting and non-voting members)</i>	18
Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i>	14
Number of Applicants for FY25: <i>Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i>	8
Budgeted Direct Expenses:	\$200

October 1, 2023 – September 30, 2024 (FY24)

As of September 30, 2024.	
Indirect Expenses: As of September 30, 2024.	\$13,306

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.

Disability	Yes	30%
	No	50%
	Chose Not to Respond	20%
District*	4	10%
	5	10%
	6	10%
	7N	10%
	7S	10%
	9	30%
	10	10%
Ethnicity	Asian – Central Asian	10%
	Asian – East Asian	30%
	Hispanic or Latinx	10%
	White or European Descent	30%
	Chose Not to Respond	20%
Gender	Female	50%
	Male	40%
	Chose Not to Respond	10%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	20%
	Heterosexual	40%
	Chose Not to Respond	40%

The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

¹ 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.

WASHINGTON STATE B A R A S S O C I A T I O N

WSBA ENTITY ANNUAL REPORT

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

Name of Entity:	Client Protection Board
Chair or Co-Chairs:	Carrie Umland
Staff Liaison:	Nicole Gustine, Assistant General Counsel, OGC Brenda Jackson, Client Protection Fund Specialist, OGC
Board of Governors Liaison:	Todd Bloom
Purpose of Entity:	
The Client Protection Board derives its authority from Admission and Practice Rules (APR) 15. The WSBA Board of Governors (BOG) serve as trustees of the Fund, while the CP Board, working with WSBA staff, administers it. The Washington Supreme Court has ordered an annual assessment on all active lawyer and LLLT members, to be held in trust for the purposes of the fund. The CP Board helps relieve or mitigate pecuniary losses sustained by clients by reason of the dishonesty of, or failure to account for money or property entrusted to, their lawyers. The CP Board reviews fund applications investigated by WSBA staff. Under APR 15, a decision by the CP Board to make a payment on an application for \$25,000 or less is final; a decision on an application for above \$25,000 is a recommendation and must be approved by the BOG.	
Strategy to Fulfill Purpose:	
The CP Board has a staff specialist and counsel/liaison in the WSBA Office of General Counsel. The CP Board meets four times per year to review applications. In accordance with APR 15, the CP Board provides a detailed report to the BOG and the Washington Supreme Court annually.	
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"?	

October 1, 2023 – September 30, 2024 (FY24)

The CP Board serves the public and members of the Bar by righting the wrongs of members of the legal profession who dishonestly deprive clients of their funds. The CP Board promotes public confidence in the administration of justice and the integrity of the legal profession. Relieving or mitigating the pecuniary loss of injured members of the public often has a deep impact on their lives, and their view of the legal profession.

2023-2024 Entity Accomplishments:

Educating WSBA members about the work of CP Board.

Increasing public awareness of the CP Board.

Continuing to operate a fiscally responsible fund.

Continuing to work to decide difficult claims.

Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities:

SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.

SMART Goals are: Specific, Measurable, Relevant and Time-Bound

1 Continue to operate a fiscally responsible fund.

2 Continue to educate WSBA members about the Client Protection Board.

3 Continue to work to decide difficult claims.

Looking Ahead: *Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.*

1 Attract applicants from a diverse array of lawyer and public members for Board positions.

2 Increase public awareness of the Client Protection Board and uses of the fund.

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

How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?

The CP Board prioritizes diversity. The CP Board actively recruits members from varied backgrounds and areas of the state. The CP Board consists of eleven lawyers and two community members. It includes members who work in government, solo practice and in larger firms. The CP Board respects the voices and votes of all members. Each application is discussed extensively before a vote is taken. The Board currently has a diverse membership.

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

CP Board applications are prepared by the WSBA analyst who also attends meetings. BOG liaison attends meetings regularly. The BOG can continue to strengthen and support the CP Board by

assisting in the promotion of diverse candidates to the CP Board and by maintaining assessments at a level that allows the fund to have a healthy balance so as to make all deserving qualifying gifts.

Entity Detail & Demographics Report:
To Be Completed by WSBA Volunteer Engagement Advisor

Size of Entity: <i>(Include voting and non-voting members)</i>	13
Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i>	2
Number of Applicants for FY25: <i>Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i>	5
Budgeted Direct Expenses: <i>As of September 30, 2024.</i>	\$2,000
Indirect Expenses: <i>As of September 30, 2024.</i>	\$142, 231

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.

Disability	No	92%
	Chose Not to Respond	8%
District*	0	6%
	1	15%
	2	8%
	5	8%
	6	8%
	7S	8%
	8	8%
	9	31%
	10	8%
Ethnicity	Asian	8%
	Asian – East Asian	8%
	Black/African American/African Descent	8%
	Hispanic/Latinx	8%

	Multi Racial/Bi Racial	15%
	White/European Descent	53%
Gender	Female	53%
	Male	39%
	Chose Not to Respond	8%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	8%
	Heterosexual	69%
	Chose Not to Respond	23%

The Yes/No response for the Sexual Orientation category is data from a previous demographic question 'Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?' This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

ⁱ 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.

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Name of Entity:	Council on Public Defense
Chair or Co-Chairs:	Jason Schwarz, Chair; Maialisa Vanyo, Vice-Chair
Staff Liaison:	Bonnie Sterken, Equity and Justice Lead, OED
Board of Governors Liaison:	Francis Adewale
Purpose of Entity:	
The Council on Public Defense (CPD) was established in 2004 to implement recommendations of the Washington State Bar Association (WSBA) Blue Ribbon Panel on Criminal Defense for maintaining and improving constitutionally effective public defense services in Washington. The WSBA Board of Governors (BOG), finding that the CPD provided a unique and valuable forum for bringing together representatives across the criminal justice system, subsequently established the CPD.	
Strategy to Fulfill Purpose:	
The CPD unites members of the public and private defense bar, the bench, elected officials, prosecutors, and the public to address new and recurring issues impacting public defenders, the public defense system and the public that depends upon it. The CPD, after review of its Charter obligations, has recently been working on issues in which it has the expertise to provide assistance to public defenders, including addressing the impact of Covid-19 on public defense delivery and workloads, revising the Standards for Indigent Defense to address workload limits, and race equity within the CPD and in public defense statewide.	
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"?	

The Council on Public Defense serves the public and champions justice. Our efforts raise the standards for public defense Statewide.

2023-2024 Entity Accomplishments:

Proposed comprehensive revisions to the WSBA Standards for Indigent Defense, which were adopted by the BOG in February 2024 and subsequently submitted them to the Court. These revisions focus on increasing the proportion of support staff to attorneys in public defense agencies, modifying attorney qualification requirements, and revising caseload standards to reflect the findings of the 2023 National Public Defense Workload Study.

Proposed revisions to the WSBA Standards for Indigent Defense applicable to family defense practice to ensure family defense attorneys have the supervision and training, caseloads, and access to social work professionals necessary to allow them to provide adequate, ethical defense to their clients. The BOG approved the revisions in September 2024 and subsequently submitted them to the Court.

Proposed revisions to the WSBA Standards for Indigent Defense to implement an interim caseload standard for public defense appeals pending the outcome of a workload study that will result in a final appellate caseload standard. The BOG approved the interim revisions in September 2024 and subsequently submitted them to the Court.

Completed a series of race equity forums and documented the learning in a Race Equity Report. The goal of the forums was to learn how to improve the recruitment, retention, and promotion of BIPOC legal professionals working in indigent defense.

Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities:

SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.

SMART Goals are: Specific, Measurable, Relevant and Time-Bound

1	Elevate diversity, equity, and inclusion within the Council by revising elements of the CPD charter to encourage diversity, inclusion, and transparent decision-making within the CPD's membership.
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2	Supporting for implementation of the Standards for Indigent Defense, including advocating for funding and infrastructure speaking with funders and policy makers and monitoring updates to Standards Appendix B (addressing the offense list).
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3	Identify and take actionable steps from the recommendations of the 2024 Race Equity Report to address the recruitment and retention of BIPOC public defense staff.
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Looking Ahead: *Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.*

1	In partnership with the Office of Public Defense, completion of a workload study to determine adequate caseload limits for appellate cases and additional revisions to the Standards in light of the findings.
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2	Support efforts to secure adequate levels of public defense funding, in collaboration with the Office of Public Defense, particularly considering implementation of the revised Standards for Indigent Defense and increased workload standards.
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3	Continue identifying solutions to improve the recruitment and retention of public defense professionals.																								
<p>Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?</i></p>																									
<p>The CPD revised the Charter this past year to address improving the diversity of the CPD and this coming year plans to develop a robust plan to improve DEI in its membership. The Council also takes seriously gathering stakeholder input, as reflected in their outreach efforts to gather input from impacted groups when revising the Standards. The CPD is also requesting support to facilitate a robust discussion around its role in addressing the recruitment and retention of BIPOC public defense staff.</p>																									
<p align="center">Entity Detail & Demographics Report: <i>To Be Completed by WSBA Volunteer Engagement Advisor</i></p>																									
Size of Entity: <i>(Include voting and non-voting members)</i>	23 voting members and up to 5 emeritus members.																								
Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i>	8																								
Number of Applicants for FY25: <i>Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i>	14																								
Budgeted Direct Expenses: <i>As of September 30, 2024.</i>	\$4,000																								
Indirect Expenses: <i>As of September 30, 2024.</i>	\$25,927																								
<p>FY24 Demographics: The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.</p> <p>Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.</p> <table border="1"> <tr> <td>Disability</td> <td>No</td> <td>42%</td> </tr> <tr> <td></td> <td>Chose Not to Respond</td> <td>58%</td> </tr> <tr> <td>District*</td> <td>0</td> <td>27%</td> </tr> <tr> <td></td> <td>2</td> <td>12%</td> </tr> <tr> <td></td> <td>3</td> <td>8%</td> </tr> <tr> <td></td> <td>4</td> <td>4%</td> </tr> <tr> <td></td> <td>5</td> <td>12%</td> </tr> <tr> <td></td> <td>7N</td> <td>17%</td> </tr> </table>		Disability	No	42%		Chose Not to Respond	58%	District*	0	27%		2	12%		3	8%		4	4%		5	12%		7N	17%
Disability	No	42%																							
	Chose Not to Respond	58%																							
District*	0	27%																							
	2	12%																							
	3	8%																							
	4	4%																							
	5	12%																							
	7N	17%																							

	7S	8%
	9	8%
	10	4%
Ethnicity	Asian – South Asian	4%
	Asian – Southeast Asian	4%
	Black, African American, African Descent	8%
	Hispanic or Latinx	8%
	White, European Descent	26%
	Chose Not to Respond	50%
Gender	Female	25%
	Male	21%
	Chose Not to Respond	54%
Sexual Orientation	Heterosexual	46%
	Chose Not to Respond	54%

The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

ⁱ 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.

WASHINGTON STATE B A R A S S O C I A T I O N

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Committee on Professional Ethics
Chair or Co-Chairs:	Monte Jewell
Staff Liaison:	Jeanne Marie Clavere, Senior Professional Responsibility Counsel; Sandra Schilling, Professional Responsibility Counsel
Board of Governors Liaison:	Mary Rathbone
Purpose of Entity:	
The Committee on Professional Ethics (CPE) prepares advisory opinions addressing recurring or emerging ethics issues facing WSBA members. The advisory opinions cover a broad context and provide in-depth guidance on the Rules of Professional Conduct (RPCs) applied to a wide variety of practice areas in Washington State. Subject to oversight by the WSBA Board of Governors (BOG) and in consultation with public and professional stakeholders, the CPE also submits reports and recommendations to the BOG for amendments to the RPCs, proposed RPCs, Superior Court Civil Rules (CR), and General Rules (GR) for consideration by the BOG and the Washington State Supreme Court (WSSC).	
Strategy to Fulfill Purpose:	
The CPE prepares advisory opinions and reviews, drafts, and edits amendments to the RPCs for submission to the BOG. The work of the CPE is done primarily by subcommittees who research and develop drafts on specific topics and conduct stakeholder outreach, often circulating discussion drafts for review and comment by stakeholders. The finished advisory opinions are then provided to the BOG for information and posted on the WSBA Advisory Opinion database for the benefit of the	

membership. The CPE also provides reports and recommendations to the BOG regarding the RPCs as requested.

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"?

When lawyers practice ethically, we strengthen our profession and uphold the public trust. Through empirically grounded and clearly articulated advisory opinions, the CPE helps to guide our profession to practice competently and honestly with peers and to equitably serve the public interest. By listening with sensitivity to our peers and to our communities to inform our reading of the RPCs, the CPE is a resource for the BOG to protect the quality of public justice for all people in Washington State while enhancing the legitimacy of the rule of democratic law.

2023-2024 Entity Accomplishments:

In FY 24, the CPE published AO 202401 which provided a powerful resource to our members about the professional duties and best practices that govern former client files. (This AO supplemented AO 181 which was last updated in 2009.) We finalized proposed changes to RPC 1.7(a)(3) pertaining to government law offices representing separate agencies which was subsequently approved by the BOG and submitted to the WSSC. We provided a review upon the request of the Court Rules and Procedures Committee for possible ethical implications of a suggested rule changes to RPCs 8.4 and 1.2. We withdrew AO 1900 and drafted a replacement opinion regarding contingency fee agreements in committed intimate relationships. We formed a subcommittee to engage with rapidly emerging questions about the use of Large Language Models and generative "artificial intelligence" applications while taking steps to coordinate our work with the newly formed BOG Legal Technology Task Force. We formed a subcommittee to draft an AO regarding fees and the refund of an advanced fee deposit to now adverse parties or to third parties. We formed a subcommittee to review the new ABA amendment to Model Rule 1.16 clarifying ethical obligations and conducting reasonable inquiries into client matters with a possible amendment to WA Rule 1.16. We drafted an advisory opinion regarding certified professional guardians (CPG) representation and RPC 1.7 implications and circulated it among stakeholders. We formed a subcommittee to address the ethical implications of RPC 1.6 and 5.3 and lawyers who are mandatory reporters and/or who employ mandatory employees, and we continued work and stakeholder outreach regarding the implications of fee splitting with a former firm.

Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities:

SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.

SMART Goals are: Specific, Measurable, Relevant and Time-Bound.

- | | |
|----------|--|
| 1 | Finalize the CPE work on an advisory opinion from a request by legal aid organizations regarding requests by funding agencies for data on clients. Drafting this opinion is completed and presentation before the BOG is pending. This aligns with WSBA goals of access to justice, serving often vulnerable and minority members of our population. |
| 2 | Finalize work on an advisory opinion analogous to ABA Formal Opinion 500 when an attorney is challenged to effectively communicate and represent their client because of language barriers. Completion of drafting this opinion is realistic within 2025. The opinion aligns with WSBA goals of access to justice and protection of vulnerable clients seeking legal services. |

3	Complete stakeholder outreach and work on an AO addressing vacating convictions in the absence of an established attorney-client relationship. Completion of this opinion is realistic in 2025. This opinion aligns with WSBA mission as it will address critical legal issues of often minority and vulnerable members of the public who have convictions on their records.
Looking Ahead: <i>Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.</i>	
1	See Above: Top Goals and Priorities.
2	Continue to receive and consider requests for advisory opinions from bar members. Respond to requests from the BOG, the WSBA Executive Director and other entities requesting review and analysis of proposed RPC amendments.
Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?</i>	
<p>The committee actively seeks input from interested stakeholders and bar members on proposed rule changes and draft opinions. Five out of nine members are women and three come from diverse backgrounds. Each member brings a unique and valuable perspective to the discussions and work of the committee through practice areas and years of experience, professional positions, and geographic diversity. Through its advisory opinions and analyses of the Rules of Professional Conduct, the CPE assists members of all backgrounds in clarifying their ethical duties under the rules, thereby helping them to maintain their practices and thrive in the profession.</p>	
Please share feedback regarding the support and engagement provided by WSBA.	
<p>The CPE is supported by the Senior Professional Responsibility Counsel and the Professional Responsibility Counsel in the Advancement Department. As staff liaisons, both PRCs advise the committee on policy and procedural issues, participate in discussions to provide additional insights and perspectives, and recommend ethics issues to the attention of the CPE for possible advisory opinions or other action. Researching the ethical implications of LLM AI is an example from FY 24. Both PRCs provide administrative support to the CPE. (The BOG liaison has provided valued background support and consultation between CPE meetings.)</p>	
Entity Detail & Demographics Report: <i>To Be Completed by WSBA Volunteer Engagement Advisor</i>	
Size of Entity: <i>(Include voting and non-voting members)</i>	10
Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i>	4
Number of Applicants for FY25: <i>Applications were submitted in the</i>	14

Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)	
Budgeted Direct Expenses: As of September 30, 2024.	\$1,000
Indirect Expenses: As of September 30, 2024.	\$44,317

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily, and individuals had the option to not respond to any or all of the factors below.

Disability	No	90%
	Chose Not to Respond	10%
District*	1	10%
	5	10%
	6	10%
	7N	20%
	7S	40%
	9	10%
Ethnicity	Asian – Central Asian	10%
	Middle Eastern Descent	10%
	White, European Descent	80%
Gender	Female	50%
	Male	50%
Sexual Orientation	Heterosexual	70%
	Chose Not to Respond	30%

The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

ⁱ 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.

WASHINGTON STATE B A R A S S O C I A T I O N

WSBA ENTITY ANNUAL REPORT FORM

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 FY2024 (October 1, 2023 – September 30, 2024). 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.

Name of Entity:	Court Rules and Procedures Committee
Entity Size:	28
Chair or Co-Chairs:	Michael Chait
Staff Liaison:	Nicole Gustine, Assistant General Counsel, OGC; Emily Crane, Paralegal II, OGC
Board of Governors Liaison(s):	Allison Widney
Purpose of Entity:	
The Court Rules and Procedure Committee (Committee) studies and develops suggested amendments to designated sets of Washington court rules on a regular cycle of review established by the Washington State Supreme Court. It occasionally responds to requests for comment from the Supreme Court on proposals developed by others. The Committee performs the rules-study function outlined in General Rule 9 and reports its recommendations to the BOG.	
Strategy to Fulfill Purpose:	
The Committee consists of several subcommittees that review the court rules and obtain input from stakeholders as to possible amendments. Evolution in case law, changes in statutes, or other new developments since last amendment drive amendments to rules. The subcommittees vet, draft, and discuss proposed amendments and submit them to the full Committee for discussion and approval. Proposed amendments approved by the Committee are forwarded to the BOG for approval. If the BOG approves, the proposed amendments are forwarded to the Supreme Court in accordance with General Rule 9.	

October 1, 2023 – September 30, 2024 (FY24)

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"?

The legal profession and the public depend on a legal system which is accessible, and which renders consistent and just results. Such a system requires court rules which are clearly understandable, internally consistent, and which function as their drafters intended. The Committee ensures our court rules are clear, consistent, and functioning through periodic review of standing rules, and review of proposed rules as directed by the BOG.

2023-2024 Entity Accomplishments:

The committee continues to carefully vet new proposals. In 2023-2024, the Committee reviewed the Superior Court Civil Arbitration Rules, Civil Rules for Superior Courts, and Civil Rules for Courts of Limited Jurisdiction.

Looking Ahead: 2024-2025 Top Goals & Priorities:

- | | |
|----------|--|
| 1 | The Committee will review the Rules of Appellate Procedure and the Rules for Appeal from Decisions of Courts of Limited Jurisdiction. |
| 2 | The Committee will continue unfinished work from the prior fiscal year regarding proposals related to the Civil Rules for Superior Courts, the Superior Court Civil Arbitration Rules, and the Civil Rules for Courts of Limited Jurisdiction. |

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?

The Committee is cognizant of diversity in selecting its members. Diversity is an important factor in recruitment and consideration of applicants. The Committee seeks input from a wide variety of stakeholders before finalizing proposals, including reaching out to several minority bar associations. The Committee also reaches out to organizations that represent minority viewpoints that might not normally be aware of the Committee's work. During the application period, the chair reached out to the leadership of several specialty and minority bar associations to encourage their membership to apply to be on the Committee. The Committee is composed of members with a wide range of backgrounds, experiences, and identities. The chair has attempted to spread subcommittee chair assignments across the state to ensure broad, geographic representation.

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

The Committee has continued to depend on the invaluable work of WSBA support staff. The Committee has also enjoyed a good working relationship with the BOG, which has been responsive in taking up matters sent to it by the Committee, and in referring matters to the Committee for consideration. As proponents of changes to the court rules increasingly present those proposals directly to the Washington State Supreme Court, the Committee has increasingly looked to the BOG for direction to consider such proposals.

Entity Detail & Demographics Report:
To Be Completed by WSBA Volunteer Engagement Advisor

Size of Entity <i>(include voting and non-voting members)</i>	28
Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i>	11
Number of Applicants for FY25 Positions: <i>Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i>	20
Budgeted Direct Expenses: <i>As of September 30, 2024.</i>	\$1,000
FY24 Indirect Expenses: <i>As of September 30, 2024.</i>	\$14,881
FY24 Demographics: The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership. Aside from the factors marked (*), demographic information was provided voluntarily, and individuals had the option to not respond to any or all of the factors below.	
Disability	No 79%
	Yes 13%
	Chose Not to Respond 8%
District*	1 8%
	2 4%
	3 4%
	5 8%
	6 13%
	7N 17%
	7S 17%
	8 13%
	9 8%
	10 8%
Ethnicity	Asian – East Asian 8%
	Middle Eastern Descent 4%
	White or European Descent 83%
	Chose Not to Respond 5%
Gender	Gender Neutral 4%
	Female 42%
	Male 63%

Sexual Orientation	Heterosexual	79%
	Chose Not to Respond	21%
<p>The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.</p>		

¹ 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.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Disciplinary Advisory Round Table
Chair or Co-Chairs:	Honorable Mary I. Yu
Staff Liaison:	Darlene Neumann
Board of Governors Liaison:	Brent Williams-Ruth
Purpose of Entity:	
The duties and responsibilities of the Disciplinary Advisory Round Table (DART) are as follows: The DART acts as a forum for the identification and discussion of issues and concerns relating to the lawyer, LLLT and LPO disciplinary systems in Washington; the DART may make recommendations for change to discipline-system rules and procedures; the DART shall provide an annual report to the Supreme Court and the WSBA Board of Governors addressing how it has performed the duties and responsibilities set forth in this Charter and, as appropriate, outlining its future work plans; the DART has no independent decision-making authority or regulatory authority.	
Strategy to Fulfill Purpose:	
The DART meets on an ad hoc basis whenever issues or concerns related to the discipline system are identified. From its discussions, the DART may make recommendations for change to the rules or procedures of the discipline system.	
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"?	
DART's consideration of discipline system issues occurs at a high level and the discussions often lead to additional perspectives or ideas to improve the discipline system. Members also benefit by	

October 1, 2023 – September 30, 2024 (FY24)

<p>gaining a better understanding of the discipline system. This process helps to ensure the integrity of the legal profession and furthers the mission to serve the public and the members of the Bar.</p>	
<p>2023-2024 Entity Accomplishments:</p>	
<p>DART proposed suggested amendments to ELC 2.14(d) to remove the prohibition on BOG members, who are experienced respondent's counsel, from representing respondents for three years after leaving office, subject to certain exceptions. The Supreme Court approved the rule amendments on September 5, 2024.</p>	
<p>DART worked in collaboration with the Regulatory Services Department (RSD) on the issue of voluntary transfer to disability inactive status and endorsed the RSD proposal to amend the WSBA Bylaws to add an inactive license fee exemption due to significant health condition. The proposal removes the voluntary transfer to disability inactive process from the discipline system to a more efficient administrative process under RSD. The proposal also protects the privacy of bar members by permitting them to transfer to regular inactive status without publicly disclosing their disability. The BOG held first and second readings on the proposal on July 19, 2024, and September 7, 2024. The proposal is expected to go to the Supreme Court for approval.</p>	
<p>On October 30, 2024, DART received a presentation from the chair emeritus of the Practice of Law Board regarding the unauthorized practice of law, new legal services market, and regulation of new legal service providers.</p>	
<p>Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities:</p> <p><i>SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.</i></p> <p><i>SMART Goals are: Specific, Measurable, Relevant and Time-Bound.</i></p>	
1	Possible ELC amendment to address grievances based solely on public information. DART will continue to explore this concept.
2	Other discipline system related issues or concerns as identified.
3	To seek changes to the charter's member representational categories in order to increase diversity.
<p>Please describe how this entity is addressing diversity, equity, and inclusion:</p> <p><i>How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?</i></p>	
<p>Approximately half of the DART membership is comprised of individuals who have an active role in the discipline system. The other half includes neutrals who are not involved in the discipline system. They are a BOG member, the Executive Director, the General Counsel, a Washington state law professor, a minority bar representative, a LLLT member, and a public member. Issues are explored through the lens of the diverse experiences of its members. The resulting round table discussion reflects a balance of opinions influencing the group's decision-making.</p>	
<p>Please share feedback regarding the support and engagement provided by WSBA.</p>	

Overall, the quality of WSBA staff support has been excellent. Staff routinely works with members to reach consensus on meeting dates and times, prepares agendas, minutes, and other materials as requested. Staff utilizes technology such as Box, Zoom, and MS 365 applications to support DART. The BOG liaison, who is a voting member, actively participates in DART meetings and decisions.

Entity Detail & Demographics Report:
To Be Completed by WSBA Volunteer Engagement Advisor

Size of Entity:
(Include voting and non-voting members)

8

Number of Vacancies for FY25:
The number of positions with terms beginning October 1, 2024 (FY25)

5

Number of Applicants for FY25:
Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)

6

Budgeted Direct Expenses:
As of September 30, 2024.

\$0

Indirect Expenses:
As of September 30, 2024.

\$6,466

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.

Disability	No	100%
District*	0	48%
	3	13%
	6	13%
	7N	13%
	10	13%
Ethnicity	American Indian, Native American	13%
	Asian – East Asian	13%
	Asian – South Asian	13%
	Black, African American, African Descent	13%
	Hispanic, Latinx	25%
	Multi-racial, bi-racial	25%
Gender	Female	75%

	Male	25%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	13%
	Heterosexual	50%
	No	13%
	Chose Not to Respond	24%
<p>The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.</p>		

ⁱ 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.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Disciplinary Board
Chair or Co-Chairs:	Christopher Sanders, Chair Deborah Severson, Vice Chair
Staff Liaison:	Nicole Gustine, Assistant General Counsel, OGC (October 1, 2023 - January 1, 2024) Szilvia Szilágyi, Assistant General Counsel, OGC (from January 1, 2024) Allison Sato, Discipline System Analyst, OGC
Board of Governors Liaison:	Not applicable.
Purpose of Entity:	
The Disciplinary Board (D-Board) derives its authority from the Supreme Court (see ELC 2.3). The D-Board performs an important role in the disciplinary/regulation process by: (1) serving as an intermediate appellate body for contested disciplinary and disability matters; (2) approving, conditionally approving or rejecting certain stipulations negotiated by the Office of Disciplinary Counsel (ODC) and respondents; and (3) through its review committees, acting on requests from the ODC to order matters to hearing, and on requests from grievants for review of matters that have been dismissed by ODC.	
Strategy to Fulfill Purpose:	
The D-Board is made up of the board chair and vice-chair, plus 12 members composing four review committees, one of which meets every three weeks. The D-Board meets six times each year as a full board. At these meetings, the D-Board reviews hearing officer recommendations for suspension	

and disbarment when a timely request for review/appeal is filed (or sua sponte review is ordered by the Board), and automatically reviews stipulations for suspension or disbarment. The D-Board issues a written recommendation to the Supreme Court in contested matters. The D-Board holds oral arguments in some cases, which are open to the public. The four review committees meet to review requests for hearings and grievant appeals from dismissals. The review committees' work is confidential and not open to the public.

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"?

The D-Board serves important functions in the disciplinary process and protects the public by upholding professionalism and ethical conduct among legal practitioners.

2023-2024 Entity Accomplishments:

In 2023, the review committees of the Disciplinary Board met 16 times to consider 453 matters. They issued 379 dismissals, ordered 43 matters to hearing, issued one admonition and 6 advisory letters, and decided 24 other non-routine matters, such as orders on deferrals, costs, etc.

In 2023, the full Disciplinary Board reviewed and issued orders on 24 stipulations, decided about the maintenance of records in one case, and heard oral argument in one appeal. Per court rule, they considered whether to order or deny Sua Sponte review in 7 cases involving a recommendation of suspension or disbarment.

Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities:

SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.

SMART Goals are: Specific, Measurable, Relevant and Time-Bound

1	The Disciplinary-Board's work is determined by Court Rule (Rules for Enforcement of Lawyer Conduct). The goal is to continue to perform high quality work in a timely manner in accordance with Court Rules.
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Looking Ahead: *Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.*

1	The Disciplinary-Board's work is determined by Court Rule (Rules for Enforcement of Lawyer Conduct). The goal is to continue to perform high quality work in a timely manner in accordance with Court Rules.
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Please describe how this entity is addressing diversity, equity, and inclusion:

How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?

The Disciplinary Selection Panel (DSP), which is a separate entity from the D-Board, makes nominations to the BOG for members to serve on the Board. Under ELC 2.2(f), the DSP considers diversity in gender, ethnicity, disability status, sexual orientation, geography, area of practice and practice experience. The D-Board has been trained by a Diversity Specialist. The D-Board seeks input from all of its members, who must vote on each order/decision in matters involving the full

Board. The D-Board has four public members, who each provide different perspectives. One public member serves on each review committee. By court rule, the D-Board has ten lawyer members and four community representative members. The current D-Board includes members self-identified as from several different races/ethnicities. The DSP interviews prospective members and makes nominations to the BOG. As noted above, ELC 2.2(f) states that in making selections, the DSP and the BOG consider diversity. The D-Board provides many leadership opportunities for interested Board members to serve, as Chair or Vice-Chair of the full Board, or as Chairs of each of the four review committees.

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

Per ELC 2.2(b) the Board of Governors have no right or responsibility to review hearing officer, review committee, or Disciplinary Board decisions or recommendations in specific cases. The Disciplinary Board welcomes BOG support in the form or recruitment of eligible lawyer and public members from diverse backgrounds.

**Entity Detail & Demographics Report:
To Be Completed by WSBA Volunteer Engagement Advisor**

Size of Entity: <i>(Include voting and non-voting members)</i>	14 (10 lawyers, 4 public members)
Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i>	5
Number of Applicants for FY25: <i>Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i>	12
Budgeted Direct "Expenses: <i>As of September 30, 2024.</i>	\$4,000
Indirect Expenses: <i>As of September 30, 2024.</i>	\$170,677

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.

Disability	No	62%
	Chose Not to Respond	38%

District*	0	22%
	1	8%
	4	23%
	7N	31%
	7S	8%
	10	8%
Ethnicity	Chose Not to Respond	23%
	American Indian/Native American	8%
	Asian – South Asian	15%
	White or European Descent	46%
	Other	8%
Gender	Female	46%
	Male	39%
	Chose Not to Respond	15%
Sexual Orientation	Heterosexual	54%
	Chose Not to Respond	46%

The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

¹ 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.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	DEI Council
Chair or Co-Chairs:	Raina Wagner, Pres. Sunitha Anjilvel (outgoing co-chair), Gov. Nam Nguyen (incoming co-chair)
Staff Liaison:	Diana Singleton, Chief Equity & Justice Office Officer, OED Saleena Salango, Equity & Justice Lead, OED
Board of Governors Liaison:	N/A
Purpose of Entity:	
The purpose of the Diversity Equity and Inclusion (DEI) Council is to advance diversity, equity, and inclusion in the legal profession and legal system and address the problems of bias, systemic inequities and under-representation in the legal profession.	
Strategy to Fulfill Purpose:	
The DEI Council fulfills this purpose through supporting programs and systemic efforts to reduce disparities in the legal profession and promote diversity and inclusion through convenings (e.g., Pathways Summit) and events (e.g., ARC reception); working with the Equity and Justice Team to develop diversity, equity and inclusion educational content and programs for members, volunteers	

¹ 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.
October 1, 2023 – September 30, 2024 (FY24)

and the public; supporting and collaborating with the affinity bar associations to promote mutual goals to advance diversity, equity and inclusion in the legal profession; promoting leadership opportunities in the WSBA, legal profession and legal system by outreaching to underrepresented members and the public, promoting diversity in the judiciary (e.g., Pro Tem CLE scholarship and networking reception) and recommending candidates for At-Large positions on the WSBA Board of Governors (BOG); advising the BOG on issues through a diversity, equity and inclusion lens and fulfilling its responsibilities outlined in General Rule 12.2(a)(6), the WSBA Strategic Goals, the Race and Equity Justice Initiatives commitments, and approved resolutions concerning diversity, equity and inclusion.

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”?

The DEI Council promotes all parts of the WSBA’s mission: 1) We serve the public by promoting a diverse legal profession that is well-equipped to serve clients and members of the Bar through program and initiatives to improve increase belonging of all legal professionals, particularly for those from marginalized and underrepresented communities; 2) we ensure integrity of the profession by working to increase meaningful access to legal services and the ethical/equitable delivery of legal services; 3) we champion justice by making strides towards a robust, inclusive and thriving profession that serves the public and improves the legal system.

2023-2024 Entity Accomplishments:

1. Held the first-ever Pathways To Legal Diversity Summit on September 12th, which convened leaders (both legal professionals and non-legal professionals) to de-silo diversity, rural disparities, and access to justice efforts; ensure greater coordination of legal programs on diversity; and provide ideas for ways the WSBA help people from disadvantaged communities to enter the profession through systemic/policy change, leveraging and improving law school alternative pathways, and filling programming gaps.
2. Drafting a 5-year Equity and Justice Plan for the WSBA Board of Governors based on outreach to key stakeholders and data from the Membership Demographic Study, and work with key consultants.
3. Concluded the WSBA’s Membership Demographic Study to identify disparities in the composition and experiences of WSBA members.
4. Collaborated with other institutions to host events designed to support pathways to a more diverse profession (e.g., WA Law Student Employer Retreat in January, Career Night at Rising Star Elementary School, ARC Reception for Seattle University School of Law Access Admissions students).

Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities:

SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.

SMART Goals are: Specific, Measurable, Relevant and Time-Bound

- | | |
|----------|--|
| 1 | Finalize and submit the 5-year Equity and Justice Plan to the Board of Governors for approval, adoption, implementation and oversight. |
|----------|--|

2	Collaborate with Equity and Justice Team staff to submit a Pathways Summit report to the Board of Governors that includes proposed investments and strategies to scale up legal diversity pathway programs in our state and/or consider policy/procedure changes that could reduce barriers to accessing the progression.
3	Improve Council member retention (measured by number of non-BOG members serving the entirety of their appointment) and inclusion/engagement (measured by attendance, improved number of people speaking at Council meetings and workgroups, and member reported experiences).
4	Improve outreach and engagement to affinity bar associations by DEI Council members serving as liaisons to affinity bar associations, improving attendance by council members at affinity bar association events, and hosting events for affinity bar associations to build relationships with WSBA.
Looking Ahead: <i>Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.</i>	
1	Utilize project management tools for DEI Council work to create sustainability and accountability as members roll off and new members join.
2	Set groundwork for a future Membership Demographic Study and other data collection needed to track progress on member diversity and experiences.
3	Building stronger relationships with allies on DEI in the legal community (e.g. Access to Justice Board/Alliance for Equal Justice members, affinity bar associations, community-based organizations) to build more collective momentum for equity and justice work.
Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?</i>	
<p>The overall mission and projects our Council undertakes focuses on increasing diversity, equity, and inclusion in the profession overall. Internally, our Council promotes a culture of inclusion through setting aside time for relationship-building, returning to shared values and strengths, and encouraging members to share perspectives. One area our Council could consider improving is in member engagement and equitable decision-making, where we acknowledge, grapple with, and center unequal power dynamics in decision-making authority and influence of members within our own Council. For example, recognizing dynamics between BOG and non-BOG members, public vs. legal professional members, and the identities/experiences of members and how they may contribute to differences in experience on the Council, particularly feelings of belonging.</p>	
<p align="center">Entity Detail & Demographics Report: <i>To Be Completed by WSBA Volunteer Engagement Advisor</i></p>	
Size of Entity: <i>(Include voting and non-voting members)</i>	18
Number of Vacancies for FY25:	8

The number of positions with terms beginning October 1, 2024 (FY25)		
Number of Applicants for FY25: Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)	20	
Budgeted Direct Expenses: As of September 30, 2024.	\$35,600	
Indirect Expenses: As of September 30, 2024.	\$126,544	
FY24 Demographics: The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership. Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.		
Disability	Yes	12%
	No	59%
	Chose Not to Respond	29%
District*	0	29%
	4	6%
	5	%
	6	6%
	7N	29%
	7S	12%
	9	12%
	10	6%
Ethnicity	Black, African American or African Descent	35%
	Hispanic or Latinx	18%
	Middle Eastern Descent	6%
	Multi Racial or Bi Racial	6%
	Other	6%
	White or European Descent	18%
	Chose Not to Respond	11%
Gender	Female	59%
	Male	12%
	Non-Binary	6%
	Transgender	6%
	Chose Not to Respond	17%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	24%
	Heterosexual	59%
	Chose Not to Respond	17%

WASHINGTON STATE B A R A S S O C I A T I O N

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Editorial Advisory Committee (EAC)
Chair or Co-Chairs:	Marc Lampson (FY 24 chair); Benjamin Gould (FY 25 chair)
Staff Liaison:	Kirsten Lacko, Editor
Board of Governors Liaison:	Dan Clark
Purpose of Entity:	
The Editorial Advisory Committee (EAC) derives its authority from the WSBA Bylaws. Members of the Editorial Advisory Committee work with the editor and WSBA staff overseeing publication of the WSBA's official magazine, Washington State Bar News. This may include establishing guidelines and editorial policy, maintaining an editorial calendar, writing articles, securing content, identifying topics and issues relevant to members, identifying authors for content, reviewing articles, and advising on issues related to content. The magazine's mission statement is: Washington State Bar News will inform, educate, engage, and inspire by offering a forum for members of the legal community to connect and to enrich their careers. Much of the EAC's work is carried out during monthly meetings that members are asked to attend, making those meetings crucial to participation. Members also engage between meetings by reviewing upcoming issues and contributing and following up on developing story ideas by writing and/or recruiting authors.	
Strategy to Fulfill Purpose:	
EAC members consult with WSBA staff regarding content selection, recruiting of authors or writing articles themselves, and providing suggestions for feature stories and columns that will provide readers with information about other Bar members and their practices, current events and trends of	

<p>interest to the legal community, career advice and other practice-oriented topics, programs and services provided to members by the WSBA, and the work of the Board of Governors.</p>	
<p>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"?</p>	
<p>The EAC helps to make a magazine that educates legal professionals about important topics such as ethics, practice management, pro bono opportunities, case updates, diversity, equity, and inclusion, and other significant news, thereby helping to ensure the competency and integrity of the legal profession on behalf of the public and furthering the mission of the WSBA.</p>	
<p>2023-2024 Entity Accomplishments:</p>	
<p>EAC members wrote, recruited authors to write, and/or helped to develop five feature articles for Bar News this year, on significant topics including Washington's anti-SLAPP statute, APR 6.1 (the "pro bono rule"), the U.S. Supreme Court's free speech decision in 303 Creative v. Elenis, and patent enforcement on inventions practiced in outer space.</p>	
<p>The EAC helped us to develop our November 2023 issue on the theme of new lawyer licensing pathways. This issue covered recommendations from the Washington Bar Licensure Task Force, the NextGen Bar Exam, opinion pieces in support of alternatives to the bar exam and changes to the character and fitness process, Washington's Law Clerk Program, and an in-depth interview with Washington's three law school deans.</p>	
<p>EAC members helped to revitalize the questionnaire for our Beyond the Bar Number feature, which appears on the last page of each issue of the magazine. They also helped to recruit folks to participate in this feature, a common reader favorite.</p>	
<p>In addition to developing content, the EAC plays a vital role in helping us to review letters to the editor and the Bar News letters to the editor policy. The committee engaged in thoughtful discussions throughout the year about letters to the editor and potential changes to our letters policy.</p>	
<p>Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities: <i>SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.</i></p> <p><i>SMART Goals are: Specific, Measurable, Relevant and Time-Bound</i></p>	
1	Have each member of the committee write or recruit an author to write at least one article in the coming year.
2	Create at least one themed issue with the help of committee members.
3	Have the committee review at least one pitch or article submission per meeting.
<p>Looking Ahead: <i>Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.</i></p>	
1	Continue to work to include voices from diverse backgrounds and areas of practice, with a variety of views and perspectives.

2	Continue to create opportunities for the magazine (within the parameters of GR 12.2) to be a civil, thought-provoking forum for dialogue among members about current issues relating to the legal system and access to and administration of justice.
3	Continue to increase reader interest and engagement/response with timely, relevant, practical, and interesting articles. Continue to increase readership of the Bar News website (https://wabarnews.org/).
<p>Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?</i></p>	
<p>There is diversity in background, years in practice, areas of practice, and perspectives among the EAC members who weigh in on story ideas, unsolicited submissions, and policy decisions. During meetings, we assign issue review to a different person each month to make sure everyone has an opportunity to share their thoughts. We are also in regular dialogue with the WSBA Equity and Justice Team regarding language and images used in the magazine. The WSBA Equity and Justice Team also reviews the Bar News editorial calendar and every issue of the magazine and provides feedback and suggestions. In addition, we are working with the Equity and Justice Team to start producing regular columns in the magazine and other content, including comprehensive coverage of the recent WSBA demographic study and upcoming DEI plan.</p>	
<p>Please share feedback regarding the support and engagement provided by WSBA. <i>For example:</i></p> <ul style="list-style-type: none"> • <i>Quality of WSBA staff support/services, including technology solutions</i> • <i>Involvement with Board of Governors, including assigned BOG liaison</i> • <i>Ideas you have on ways WSBA can continue to strengthen/support your entity.</i> 	
<p>The EAC works closely with WSBA staff—the staff liaison as well as the entire magazine team. The magazine team attends every monthly meeting, and the staff liaison prepares the agendas and works with the chair to finalize them. The Board liaison also attended one or two monthly committee meetings. In addition, members of the WSBA Equity and Justice team attend some EAC meetings and contribute to the magazine.</p>	
<p align="center">Entity Detail & Demographics Report: <i>To Be Completed by WSBA Volunteer Engagement Advisor</i></p>	
<p>Size of Entity: <i>(Include voting and non-voting members)</i></p>	14
<p>Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i></p>	7
<p>Number of Applicants for FY25: <i>Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i></p>	5
<p>Budgeted Direct Expenses: <i>As of September 30, 2024.</i></p>	\$0

October 1, 2023 – September 30, 2024 (FY24)

Indirect Expenses: <i>As of September 30, 2024.</i>		\$15,879
FY24 Demographics: The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership. Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.		
Disability	Yes	9%
	No	73%
	Chose Not to Respond	18%
District*	0	1%
	7N	45%
	7S	9%
	8	18%
	9	27%
Ethnicity	Hispanic or Latinx	9%
	White or European Descent	82%
	Chose Not to Respond	9%
Gender	Female	36%
	Male	55%
	Chose Not to Respond	9%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	18%
	Heterosexual	64%
	Chose Not to Respond	18%
The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you openly identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.		

ⁱ 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.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT FORM

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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, 2023 – September 30, 2024). 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.

Name of Entity:	Judicial Recommendation Committee
Entity Size:	22
Chair or Co-Chairs:	Ian Cairns
Staff Liaison:	Sanjay Walvekar, Legislative Affairs Manager, COMM
Board of Governors Liaison(s):	Todd Bloom, Dan Clark
Purpose of Entity:	
The Judicial Recommendation Committee (JRC) derives its authority from the Bylaws of the WSBA. The JRC screens and interviews candidates for state Court of Appeals and Supreme Court positions. Recommendations are reviewed by the WSBA Board of Governors (BOG) and referred to the Governor for consideration when making judicial appointments. Per the JRC Guidelines, “[t]he proceedings and records of the committee, including the comments of applicants, committee discussions, and committee votes, shall be kept strictly confidential.”	
Strategy to Fulfill Purpose:	
The JRC screens and interviews candidates for the state’s appellate courts, the Washington Supreme Court and the Washington State Court of Appeals. Thereafter, it makes recommendations to the BOG. Following Board approval, the recommendations are sent to the Washington State Governor’s Office as part of the committee’s role of preparing and maintaining a list of individuals who are well-qualified for and interested in appointment to the appellate bench.	

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"?	
The JRC's work directly benefits the public, members of the Bar, and the legal profession by providing the Governor's office with recommendations that help it make informed and quality judicial appointments.	
2023-2024 Entity Accomplishments:	
The JRC held three meetings in which it evaluated eight candidates. The JRC's recommendations were passed on to the Board of Governors which concurred with the JRC. These recommendations were then given to the Governor's office.	
Looking Ahead: 2024-2025 Top Goals & Priorities:	
1	Continue to offer a thorough and fair process aimed at ensuring well-qualified candidates are presented to the Governor's office for open positions to the Washington Supreme Court and Court of Appeals.
2	Continue to educate committee members about the importance of reference check assignments, meeting attendance, and ability to make quorum.
Please describe how this entity is addressing diversity, equity, and inclusion: <i>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?</i>	
A diversity of perspectives is embedded in the JRC Guidelines under "Composition," for selection of committee members. The committee received a training from the WSBA's Diversity, Equity, and Inclusion team at the JRC's first meeting of the fiscal year. In addition, some of the criteria the committee considers when recommending a candidate are related to a commitment to diversity.	
Please share feedback regarding the support and engagement provided by WSBA.	
The JRC guidelines require a BOG liaison to attend each JRC meeting and JRC recommendations are considered by the BOG periodically throughout the year.	
Entity Detail & Demographics Report: To Be Completed by WSBA Staff	
Size of Entity: <i>(Include voting and non-voting members)</i>	22
Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i>	4
Number of Applicants for FY25: <i>Applications submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i>	6

FY24 Budgeted Direct Expenses: <i>As of September 30, 2024.</i>	\$2,250
Indirect Expenses: <i>As of September 30, 2024</i>	\$37,852

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily, and individuals had the option to not respond to any or all of the factors below.

Disability	No	78%
	Yes	9%
	Chose Not to Respond	13%
District*	0	1%
	1	4%
	2	4%
	4	4%
	5	9%
	6	17%
	7N	26%
	7S	9%
	8	4%
	9	9%
	10	13%
Ethnicity	Asian – East Asian	9%
	Black, African American, African Descent	9%
	Hispanic, Latinx	9%
	White, European Descent	73%
Gender	Female	35%
	Male	61%
	Chose Not to Respond	4%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	13%
	Heterosexual	70%
	Chose Not to Respond	17%

The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Law Clerk Board
Chair or Co-Chairs:	Emily Rose, Chair
Staff Liaison:	Katherine Skinner, Law Clerk Program Lead, RSD
Board of Governors Liaison:	Mary Rathbone
Purpose of Entity:	
The Law Clerk Board (LCB) supervises the Law Clerk Program under Rule 6 of the Washington Supreme Court's Admission and Practice Rules (APR). The purpose of the LCB is to assist the WSBA in supervising the APR 6 Law clerk Program (Program).	
Strategy to Fulfill Purpose:	
The LCB considers applications for enrollment in the program, interviews and evaluates law clerks and tutors during their course of study, and certifies that law clerks have successfully completed the program thereby meeting the educational requirement for the lawyer bar examination in Washington state.	
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"?	
The LCB serves the public and members of the bar by assisting law clerks through a rigorous program to become members of the bar themselves. The LCB monitors the law clerks as they progress through the Program to ensure they are meeting requirements in APR 6 so they are as	

<p>prepared for practice as a traditional law school student would be. The Law Clerk Board is working to increase outreach efforts in rural counties in the state to increase access to justice.</p>	
<p>2023-2024 Entity Accomplishments:</p>	
<p>Created and sent surveys to membership to understand how much is known about the Law Clerk Program.</p>	
<p>Review of Board policies, making necessary adjustments to improve program management</p>	
<p>Developed the Program Expansion Committee to engage in discussion on rule changes and other ways to consider program expansion.</p>	
<p>Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities: <i>SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.</i></p> <p><i>SMART Goals are: Specific, Measurable, Relevant and Time-Bound</i></p>	
1	Create liaison guidelines to better support the law clerks and tutors.
2	Expansion committee to create a report for the Law Clerk Board's review on potential rule changes to APR 6.
3	Investigate how to create a presentation or other event to educate members on the Law Clerk Program.
<p>Looking Ahead: <i>Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.</i></p>	
1	Law Clerk graduate reciprocity with other states
2	Program expansion in rural communities
<p>Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?</i></p>	
<p>The Law Clerk Program itself provides an alternative to law school for legal education for those who may have barriers to attending law school. The LCB hopes to increase the diversity of the law clerks enrolled in the Program. The LCB seeks board members who represent diversity in geography as well as members who self-identify as individuals that are underrepresented in the legal profession. The LCB seeks to have a diverse group of board members to bring a variety of perspectives to the Program.</p>	
<p>Please share feedback regarding the support and engagement provided by WSBA.</p>	
<p>WSBA staff provide technology assistance when needed for participants and Board members. The LCB is assigned at least one BOG liaison that is invited to each LCB meeting. The BOG liaison takes</p>	

what they learn in the meetings to meetings with the BOG and is able to share the knowledge they have on behalf of the LCB as needed.

Entity Detail & Demographics Report:
To Be Completed by WSBA Volunteer Engagement Advisor

Size of Entity:
(Include voting and non-voting members)

11

Number of Vacancies for FY25:
The number of positions with terms beginning October 1, 2024 (FY25)

3

Number of Applicants for FY25:
Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)

4

Budgeted Direct Expenses:
As of September 30, 2024.

\$8,000

Indirect Expenses:
As of September 30, 2024.

\$52,524

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.

Disability	No	91%
	Chose Not to Respond	9%
District*	0	%
	1	9%
	2	18%
	3	9%
	4	9%
	5	36%
	7S	18%
Ethnicity	White or European Descent	82%
	American Indian	9%
	Chose Not to Respond	9%
Gender	Female	64%
	Male	27%
	Chose Not to Respond	9%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	18%
	Heterosexual	45%

No	9%
Chose Not to Respond	28%

The Yes/No response for the Sexual Orientation category is data from a previous demographic question 'Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?' This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

ⁱ 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.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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.

In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Limited Practice Board
Chair:	Thomas Peterson
Staff Liaison:	Cathy Biestek, Managing Regulatory Counsel
Board of Governors Liaison:	Serena Sayani
Purpose of Entity:	
The Limited Practice Board (LPB) derives its authority from the Washington Supreme Court under Rule 12 of the Admission and Practice Rules (APR). The purpose of the LPB is to oversee the Limited Practice Officer (LPO) license program and to work with the Washington State Bar Association (WSBA) and others to create and grade the LPO examinations for admission to practice law as an LPO, approve standard forms for use by LPOs, and to handle grievances and enforce discipline under the applicable ethics and procedural rules.	
Strategy to Fulfill Purpose:	
The LPB meets four to six times per year to develop and grade the LPO exam and to discuss topics of concern or that are relevant to the LPO license. The LPB has several committees serving various functions. The Discipline Committee handles the resolution of grievances against LPOs in accordance with the Rules for Enforcement of LPO Conduct (ELPOC). The Forms Committee reviews, edits, and creates standard forms used by LPOs that are submitted to the LPB for approval. The LPO Examination Committee identifies, with Court approval, subjects to be covered on the LPO examination and develops and updates exam questions. The Rules Committee reviews rules related to the LPO license, drafts amendments or new rules when necessary and makes recommendations to the LPB regarding suggested rule changes. The Liaison Committee establishes and maintains	

October 1, 2023 – September 30, 2024 (FY24)

communication with entities both inside and outside of the WSBA, including the Supreme Court, the WSBA Board of Governors, and the Department of Financial Institutions.	
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"?	
The LPB serves the public by overseeing the LPO license, including (1) preparing and grading the LPO examinations that are administered by the WSBA twice a year, and (2) drafting, updating, editing, and approving forms used by LPO. The LPB ensures the integrity of the legal profession by administering the LPO discipline system, including handling grievances against LPOs. The LPB champions justice by helping make certain legal services (real estate closings) more affordable than they likely would be if performed only by attorneys and therefore accessible by a broader percentage of the population.	
2023-2024 Entity Accomplishments:	
Prepared and graded the February 2024 and July 2024 LPO Examinations	
LPB first reading of proposed edits to the LPO exam study-topic list by the LPO Examination Committee	
Began comprehensive review of LPO-exam questions bank	
Revised the following LPO forms: Bargain & Sale Deeds (LPB15-05(i) rev. 10.2023 and LPB 15-05(r) rev. 10.2023) and Personal Representative Deed (LPB 74-16(r) rev. 01.2024)	
Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities: <i>SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.</i> <i>SMART Goals are: Specific, Measurable, Relevant and Time-Bound</i>	
1	Prepare and grade the February 2025 and July 2025 LPO Examinations.
2	Revise the LPO exam study-topic list and submit to Court for approval per APR 12(b)(2)(A).
3	Process grievances against LPOs in a timely manner as needed.
Looking Ahead: <i>Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.</i>	
1	Assess LPO examination content, format, grading, and pass score requirements under APR 4(f) against current information regarding the preparation and grading of professional exams to determine whether any changes to rules or practices relating to the LPO exam and LPO admission should be proposed.
Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?</i>	

The required qualifications to sit for the LPO examination under APR 3 are to be of good moral character, possess the requisite fitness to practice law, and to be at least 18 years of age. As a result, the pathway to acquiring an LPO license is accessible to a broad and diverse applicant pool. The LPB, in collaboration with the WSBA, works to update the LPO examination questions and the study-topic list to ensure the LPO examination is a fair and equitable method of licensing qualified applicants as LPOs. The LPB, in collaboration with the WSBA, will work to advertise and do outreach regarding the LPO license and the LPB with the goal to increase diversity in LPO and LPB applicants.

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

The LPB has a positive, collaborative relationship with WSBA staff.

Entity Detail & Demographics Report:
To Be Completed by WSBA Volunteer Engagement Advisor

Size of Entity: <i>(Include voting and non-voting members)</i>	9
Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i>	2
Number of Applicants for FY25: <i>Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i>	3 (of which one was selected to complete the partial board-member term vacated during FY2024 that will end 09/30/2026)
Budgeted Direct Expenses: <i>As of September 30, 2024.</i>	\$4,000
Indirect Expenses: <i>As of September 30, 2024.</i>	\$170,677

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.

Disability	No	89%
	Chose Not to Respond	11%
District*	0	56%
	1	11%
	2	22%
	7S	11%
Ethnicity	White or European Descent	89%
	Chose Not to Respond	11%
Gender	Female	56%
	Male	33%

	Chose Not to Respond	11%
Sexual Orientation		
	Heterosexual	56%
	Chose Not to Respond	44%
<p>The Yes/No response for the Sexual Orientation category is data from a previous demographic question 'Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?' This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.</p>		

ⁱ 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.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Limited License Legal Technician (LLLT) Board
Chair	Steve Crossland
Vice Chair:	Nancy Ivarinen
Staff Liaison:	Cathy Biestek, Managing Regulatory Counsel
Board of Governors Liaison:	Kristina Larry
Purpose of Entity:	
The Limited License Technician Board (LLLT Board) derives its authority from the Washington Supreme Court under Rule 28 of the Admissions and Practice Rules (APR). The purpose of the LLLT Board is to oversee the LLLT license program, perform the responsibilities provided in APR 28(C)(2), and to handle grievances and enforce discipline against LLLTs under the applicable ethics and procedural rules.	
Strategy to Fulfill Purpose:	
The LLLT Board meets approximately six times a year to discuss topics of concern or that are relevant to the LLLT license and to accomplish responsibilities provided in APR 28(C)(2), including but not limited to proposing appropriate rule changes, addressing LLLT disciplinary issues, developing forms for LLLT use, and developing CLEs relevant to LLLT scope of practice. The LLLT Board has several committees serving various functions, including the Family Law Practice Area Committee, the Discipline Committee, the Nominations Committee, the Rules & Research Committee, and the Communications Committee.	

<p>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”?</p>	
<p>The LLLT Board serves the public by overseeing the LLLT license. Practicing LLLTs provide limited legal services in the practice area of domestic relations. Many LLLTs report serving primarily clients of low and moderate means, as well as providing pro bono services. The LLLT Board ensures the integrity of the legal profession by administering the LLLT discipline system, including handling grievances against LLLTs.</p>	
<p>2023-2024 Entity Accomplishments:</p>	
<p>Proposed appropriate and necessary amendments to APR 28 and Regulations that were adopted by the Court.</p>	
<p>Approved the Real Property Division Form for LLLT use. See attached Real Property Division Form.</p>	
<p>Developed and conducted required supplemental education for LLLTs on the Real Property Division Form.</p>	
<p>Presented to the WSBA BOG at its May 2024 meeting on the history and current status of the LLLT license. See attached LLLT Board Presentation.</p>	
<p>Continue to collaborate with the Practice of Law Board and Access to Justice Board regarding other programs involving limited legal service providers.</p>	
<p>Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities: <i>SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.</i></p> <p><i>SMART Goals are: Specific, Measurable, Relevant and Time-Bound</i></p>	
1	<p>Research and gather information on limited legal license types in an increasing number of other states and countries; assess the LLLT license against the information gathered about other limited license types to help inform possible improvements to the LLLT license and applicable rules; continue to be a resource to other states exploring limited legal licenses.</p>
2	<p>Collaborate with other boards and entities, including the WSBA BOG, the Practice of Law Board, the Access to Justice Board, the WSBA DEI Council, and the WSBA STAR Committee, regarding the delivery of law related services by limited license professionals.</p>
3	<p>Develop and conduct required supplemental education for LLLTs on the topic of Minor Guardianship Actions.</p>
<p>Looking Ahead: <i>Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.</i></p>	
1	<p>Collaborate with other boards and entities, including the WSBA BOG, the Practice of Law Board, the Access to Justice Board, the WSBA DEI Council, and the WSBA STAR Committee, regarding the delivery of law related services by limited license professionals and propose changes to APR 28 Rule and Regulations to improve the LLLT license.</p>

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

How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?

The LLLT Board emails all LLLTs prior to LLLT Board meetings inviting them to attend and sharing where the Board meeting information can be found on the LLLT Board website. The LLLT Board surveyed LLLTs to gather information about the impact of the LLLT license on communities in Washington. The LLLT Board, in collaboration with the WSBA, will work to recruit diverse applicants to the LLLT Board.

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

The LLLT Board has a positive, collaborative relationship with WSBA Staff and BOG liaison. WSBA CLE has sponsored MCLE credit for the LLLT Board's required supplemental education for LLLTs.

Entity Detail & Demographics Report:
To Be Completed by WSBA Volunteer Engagement Advisor

Size of Entity:

(Include voting and non-voting members)

11

Number of Vacancies for FY25:

The number of positions with terms beginning October 1, 2024 (FY25)

4

Number of Applicants for FY25:

Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)

7

Budgeted Direct Expenses:

As of September 30, 2024.

\$14,240

Indirect Expenses:

As of September 30, 2024.

\$48,846

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.

Disability	No	73%
	Yes	27%
District*	0	45%
	2	18%
	3	9%
	8	9%

	9	9%
Ethnicity	White or European Descent	100%
Gender	Female	73%
	Male	27%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	9%
	Heterosexual	82%
	Chose Not to Respond	9%
<p>The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.</p>		

¹ 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.

TO: WSBA Board of Governors
CC: Terra Nevitt, Executive Director
FROM: Steve Crossland, Limited License Legal Technician (LLLT) Board Chair
Cathy Biestek, Managing Regulatory Counsel &
WSBA Staff Liaison to LLLT Board
DATE: April 5, 2024
RE: Informational Presentation Regarding LLLT License Post-Sunset

INFORMATION/PRESENTATION: Informational presentation regarding LLLT license post-sunset.

The LLLT-license pipeline closed July 31, 2023, in accordance with the Washington Supreme Court's decision to sunset the LLLT license per Supreme Court Order Nos. 25700-A-1361 and 25700-A-1428. There are currently 86 LLLT members of the WSBA. Representatives of the LLLT Board will provide an informational presentation on the LLLT license post-sunset and invite questions from current BOG members regarding the LLLT license.

The goal of the presentation is to provide BOG members with information about the LLLT license, including its history, administration, and impact, and share reflections on knowledge gained from being the first state in the country to adopt a paraprofessional license of its kind.

Attachments

LLLT Informational PowerPoint Presentation: *Overview of the Limited License Legal Technician (LLLT) License (May 2024)* with hyperlinks included.

OVERVIEW OF THE LIMITED LICENSE LEGAL TECHNICIAN (LLLT) LICENSE

Sarah Bové

Christine Carpenter

Stephen Crossland

May 2024



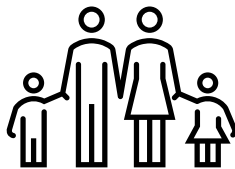
LLLT LICENSE ORIGIN

2003 WASHINGTON STATE CIVIL LEGAL NEEDS STUDY

of low-income populations revealed unmet need for legal services for both low- and moderate-income populations, with areas of greatest need



HOUSING LAW



FAMILY LAW



CONSUMER LAW

LLLT LICENSE: FIRST IN THE NATION

June 2012 Supreme Court Order No. 25700-A-1005

adopted APR 28 - LLLT Rule



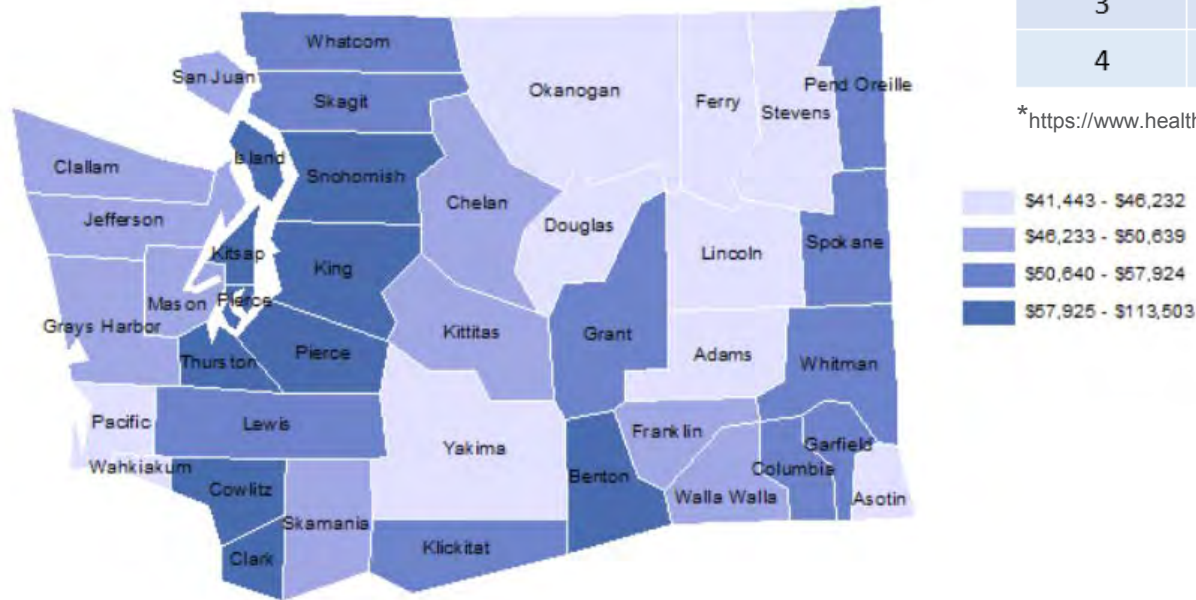
- ➡ “we have ... witnessed the wide and ever-growing **gap in necessary legal and law related services for low and moderate income persons.**”
- ➡ “[The civil legal system] ... is **unaffordable not only to low income people but, as the 2003 Civil Legal Needs Study documented, moderate income people as well** (defined as families with incomes between 200% and 400% of the Federal Poverty Level.”
- ➡ “[w]e have a **duty to ensure the public can access affordable legal and law related services**, and that they are not left to fall prey to the perils of the **unregulated market place.**”

In 2015, Supreme Court issues first LLLT licenses.

WASHINGTON INCOME LEVELS

Average Wages, 2021

Inflation-Adjusted to 2021 Dollars



Family Size	2024 Federal Poverty Level (FPL) Income*	Moderate Income 200-400% FPL (2024)
1	\$15,060	\$30,120-\$60,240
2	\$20,440	\$40,880-\$81,760
3	\$25,820	\$51,640-\$103,280
4	\$31,200	\$62,200-\$124,800

*<https://www.healthcare.gov/glossary/federal-poverty-level-fpl/>

WA State Office of Financial Management Average Wages by County Map

<https://ofm.wa.gov/washington-data-research/statewide-data/washington-trends/economic-trends/washington-and-us-average-wages/average-wages-county-map>

THE LLLT LICENSE



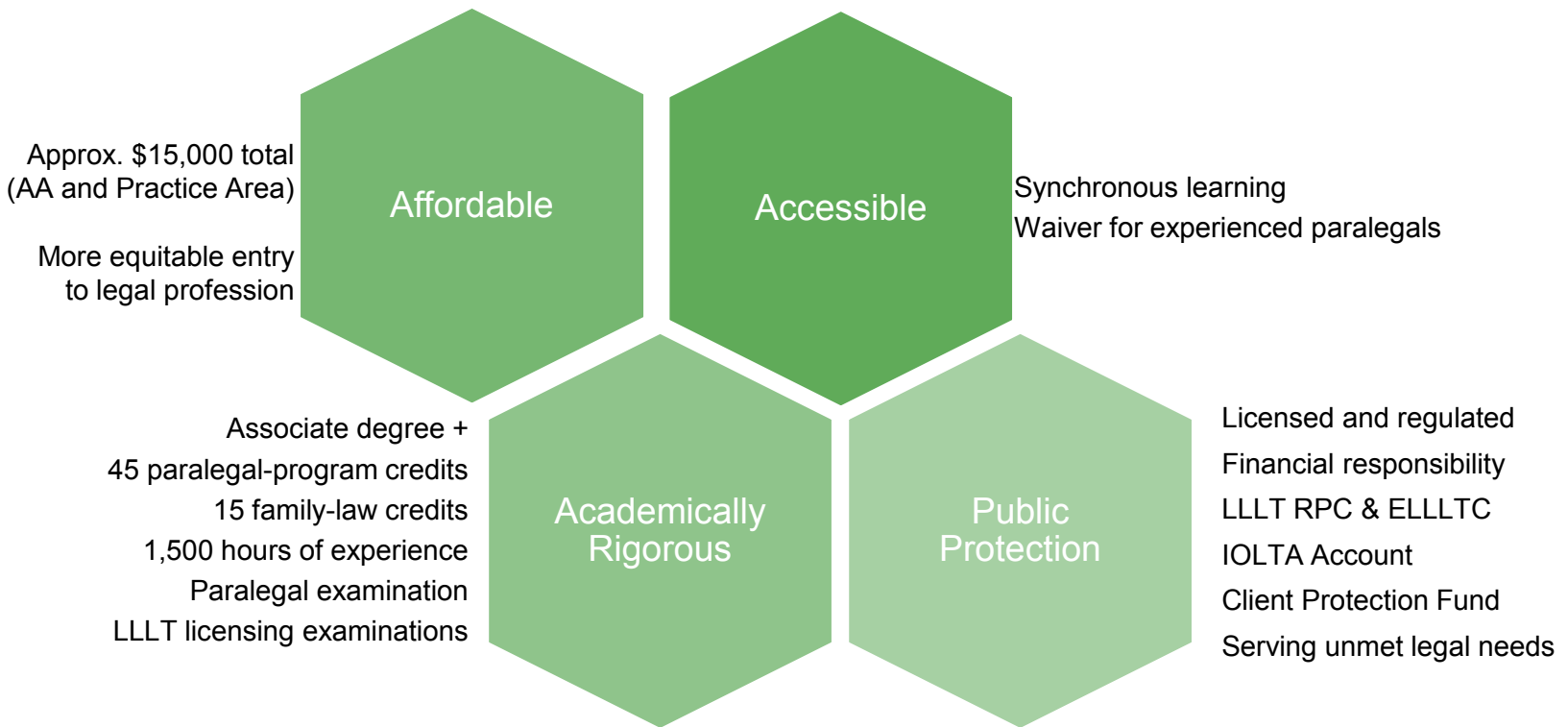
Purpose of the LLLT License: to serve the public with qualified and regulated legal services providers at a price that the consumer can afford.

LLLT Scope of Practice: LLLTs are licensed to provide legal advice and limited legal services in family law matters including child support modification actions, dissolution, and domestic violence actions.

LLLT Business Models:

- Solo LLLT practices
- Employment with firm
- Co-Ownership of Law/LLLT Firm
- Government
- Civil legal aid providers/ volunteer lawyer programs

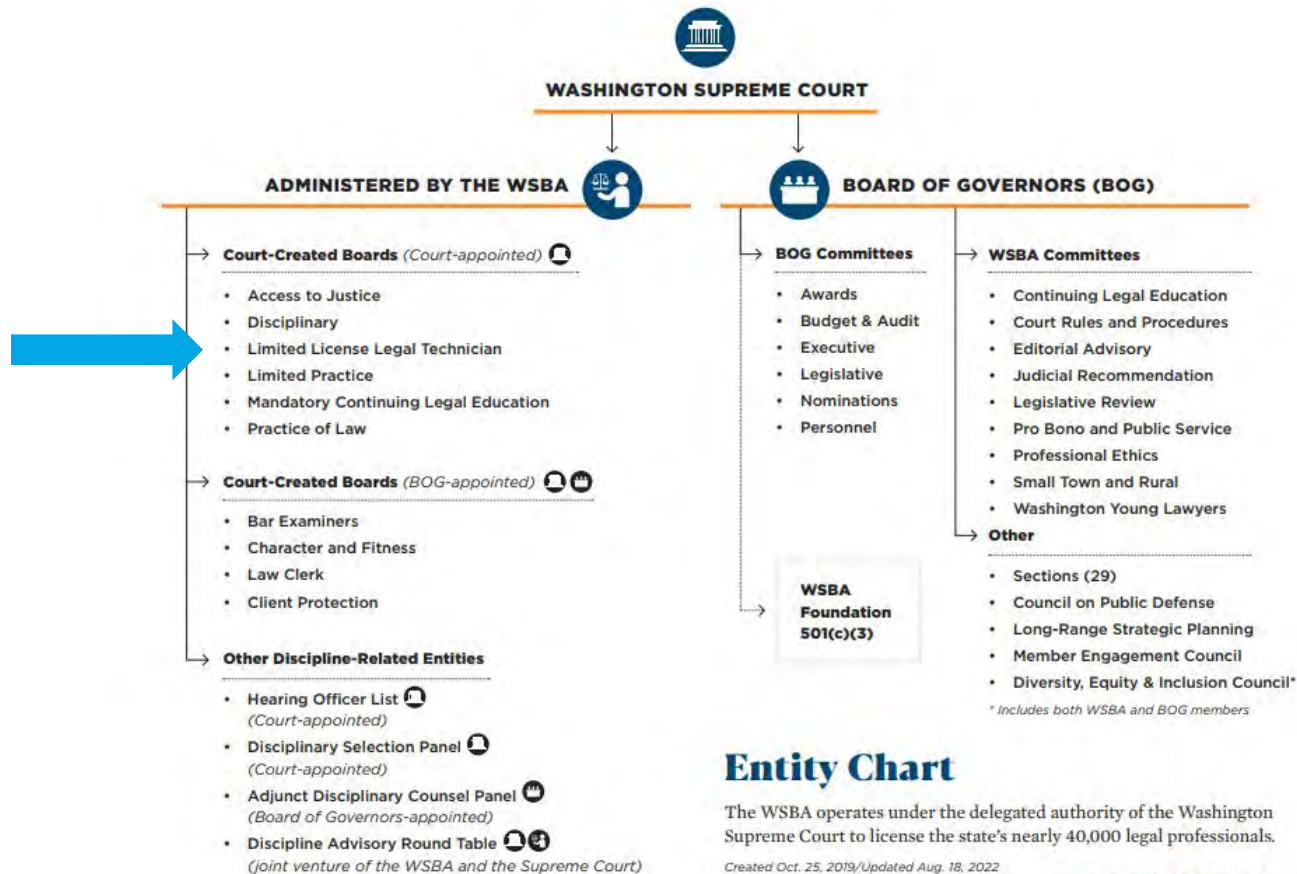
LLLT LICENSE: AN ALTERNATIVE PATHWAY TO LEGAL PROFESSION



WASHINGTON SUPREME COURT DECISION TO SUNSET LLLT LICENSE

- [June 2020 Supreme Court Letter re Decision to Sunset](#), providing “after careful consideration of the **overall costs** of sustaining the program and the **small number of interested individuals**, a majority of the court determined that the LLLT program is not an effective way to meet these needs....”
- [June 2020 Justice Madsen’s Dissent to Decision to Sunset LLLT Program](#), “disagree[ing] with the court’s vote as well as the way in which it was carried out.”
- [July 2021 Supreme Court Order No. 25700-A-1361](#) adopted amendments to APR for sunset of LLLT licensing.
- [June 2022 Supreme Court Order No. 25700-A-1428](#) required all remaining LLLT applicants to complete preadmission requirements by July 31, 2023.

See [Decision to Sunset LLLT Program](#) webpage to review communication and history regarding Court’s decision to sunset LLLT Program.



Entity Chart

The WSBA operates under the delegated authority of the Washington Supreme Court to license the state's nearly 40,000 legal professionals.

Created Oct. 25, 2019/Updated Aug. 18, 2022

**WASHINGTON STATE
BAR ASSOCIATION**

https://www.wsba.org/docs/default-source/legal-community/volunteer/volunteer-toolbox/wsba_entity-chart_8.18.22.pdf?sfvrsn=847010f1_5

CURRENT STATUS OF LLLT LICENSE

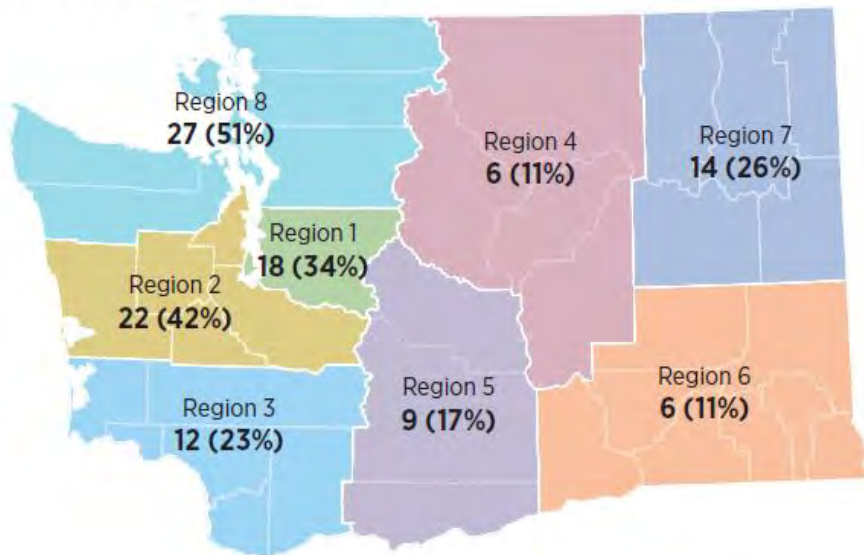
- LLLT Board oversees 86 LLLTs currently
 - Provides required supplemental education to LLLTs.
 - Approves forms, including [real property division form](#) in September 2023.
 - Carries out functions under ELL LTC relating to LLLT discipline system.
- [LLLT License FY2024 Budget:](#)
 - Revenue (\$20,712): LLLT license fees and late fees;
Lack opportunity to increase with LLLT license in sunset status
 - Expense (\$91,840): LLLT Board and WSBA staff expenses related to ongoing regulatory oversight of LLLT license

IMPACT OF LLLTs



In January 2024, the LLLT Board surveyed the WSBA's then eighty-eight LLLTs to better understand the current impact of the LLLT license in Washington. Fifty-three LLLTs participated (60% response rate), representing a cross-section of LLLT experience levels and demonstrating a LLLT presence throughout the state.

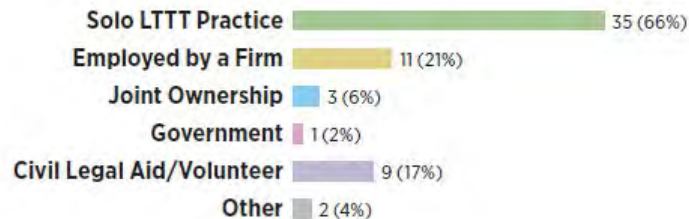
Regions Where LLLTs Practiced or Served Clients



Years Licensed as LLLT



LLLT Business Structure



*Data labels refer to the number of responses and % of total responses.

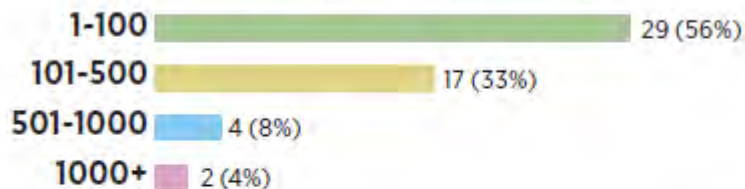
IMPACT OF LLLTs



January 2024 LLLT Survey Responses

- ❖ Significant portion of responding LLLTs' clients are below 400% of Federal Poverty Level

■ Number of Clients Served (since licensed)



■ % of Clients Served Below 400% of Federal Poverty Level



*Data labels refer to the number of responses and % of total responses.

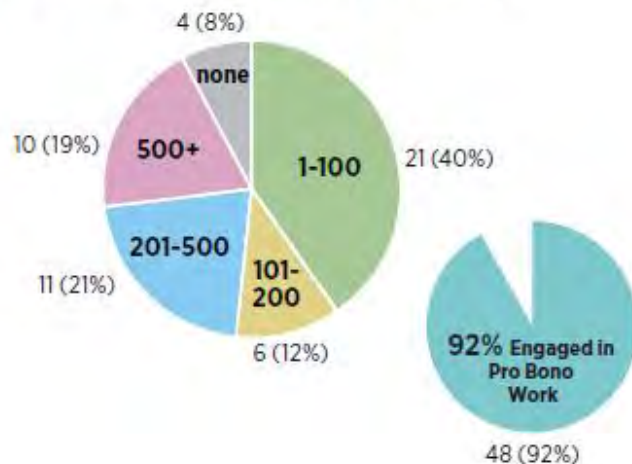
IMPACT OF LLLTs



January 2024 LLLT Survey Responses

- ❖ Nearly all responding LLLTs have engaged in pro bono hours (as defined in [LLLT RPC 6.1](#))
- ❖ Over half of responding LLLTs offer sliding fee scale

■ Total Pro Bono Hours (since licensed)



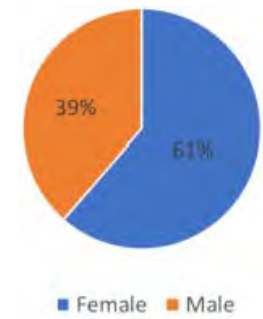
■ Offer Sliding Fee Scale? ■ Offer Unbundled Legal Services?



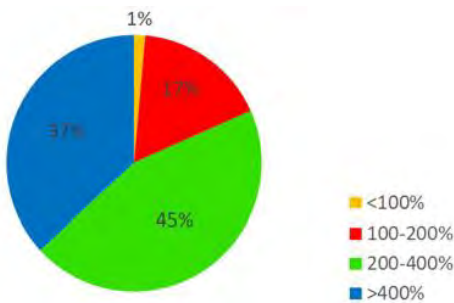
*Data labels refer to the number of responses and % of total responses.

IMPACT OF LLLTs: ONE LLLT's STORY

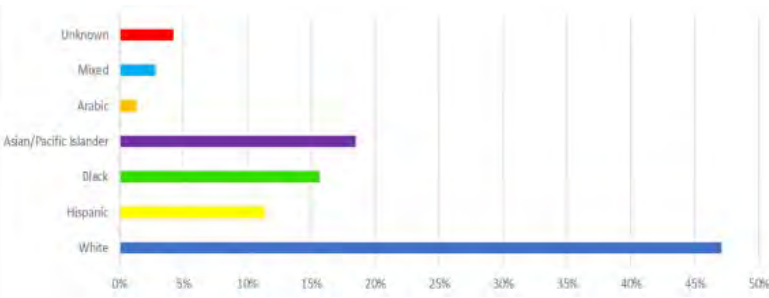
Client (%) Gender



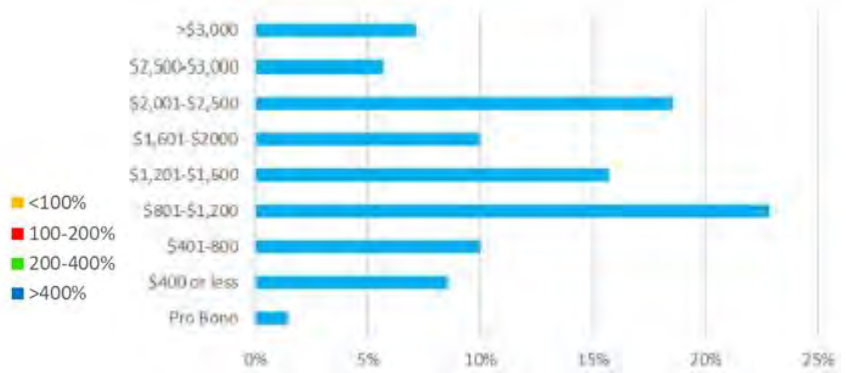
Client (%) FPL Level



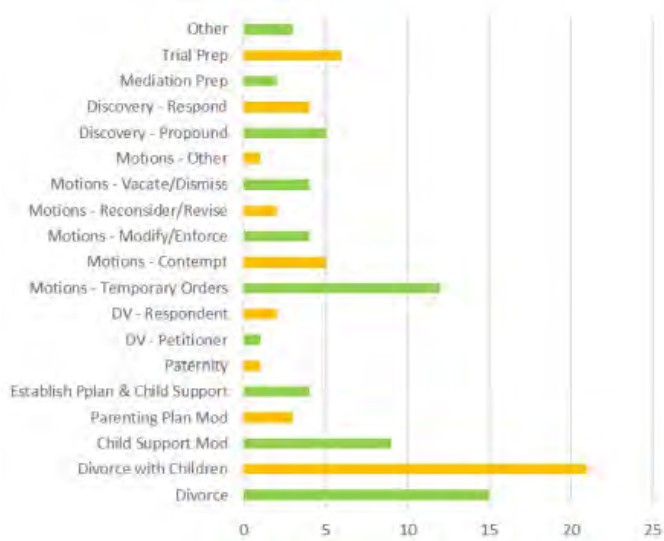
Client (%) Race/Ethnicity



Fees Paid Per Client for All Actions within Case



Case/Task Types



IMPACT OF LLLTs

Highlighting a few LLLTs recognized for pro bono service in their communities:

- **Andren Moyer** presented with the Dedicated Service Award in 2024 and recognized as the [June 2023 Very Important Volunteer \(V.I.V.\)](#) by the Volunteer Lawyers Program of Spokane County Bar Association.
- **Mark Von Weber** presented with the [Gene Schuster Award in 2023](#) by the Benton-Franklin Legal Aid Society.
- **Sarah Bové** presented [Pro Bono Award in 2023](#), along with attorney Rene Cespedes, with whom Sarah works, by Eastside Legal Assistance Program (ELAP).
- **Lorena Mendoza** presented with the [Gene Schuster Award in 2022](#) by the Benton-Franklin Legal Aid Society.
- **Lesli Ashley** recognized as the [July 2021 V.I.V.](#) by the Volunteer Lawyers Program of Spokane County Bar Association.

IMPACT OF LLLTs

“There is considerable evidence that for the LLLTs, their clients, the lawyers who work with them, the judges who decide family-law cases, and attorneys who employ LLLTs, the program has been a real success. The LLLTs have provided competent legal services to moderate means Washingtonians at critical moments in their lives. Their professionalism and proficiency in family law have enabled more efficient proceedings and better decision-making for the commissioners who conduct pre-trial proceedings and judges who hold trials, improved outcomes for clients, and added more business for attorneys who have hired LLLTs to capture a previously untapped market.”

Jason Solomon & Noelle Smith, The Surprising Success of Washington State's Limited License Legal Technician Program, Stanford Center on the Legal Profession, April 2021, at page 5, <https://law.stanford.edu/publications/the-surprising-success-of-washington-states-limited-license-legal-technician-program/>.

A NATIONAL TREND

Licensed Legal Paraprofessional Programs:

Year	State	Program	Status
2012	Washington	Limited License Legal Technicians	Sunset (July 2023)
2018	Utah	Licensed Paralegal Practitioner	Currently Licensing
2020	Minnesota	Legal Paraprofessional Pilot Project	Pilot program extended through March 2024
2021	Arizona	Legal Paraprofessional	Currently Licensing
2023	Colorado	Licensed Legal Paraprofessionals	Currently Licensing
2023	Oregon	Licensed Paralegals	Currently Licensing
2023	New Hampshire	Paraprofessional Pilot Program	Pilot program began January 2023

- ➡ With [other states](#) considering similar licensed legal paraprofessional programs and/or implementing other programs allowing legal-aid workers, court navigators or others to provide legal assistance in discrete areas of law.
- ➡ Entities in Washington continuing to consider alternative legal-service providers as a way of closing the justice gap, including the [Practice of Law Board](#) and the [Access to Justice Board](#).

LLLT LICENSE: REFLECTIONS ON THE EXPERIENCE

- **Practice Areas**: Provide for more practice areas from the start (e.g., family-law, evictions, and debt-collection matters).
- **Experience Requirement**: Lower experience requirement hours and provide waiver for those who have pursued higher education, bachelor degrees and JDs.
- **Course Delivery**: Work with community colleges to provide practice-area curriculum and create opportunity for financial aid.
- **Mentorship**: Create opportunities for those new to the legal field to form professional mentorships with attorneys and LLLTs.
- **Marketing**: Increase awareness of existence of the license and the services that LLLTs provide.
- **Data**: Gather data to evaluate the effectiveness of the license and ways in which the license might be improved to better serve the public.
- **Collaboration**: Communicate benefits and opportunities of working with LLLTs to judges and attorneys.



Real Property Division Form and Worksheet

Instructions

The information provided on this document does not and is not intended to constitute legal advice; instead, all information and content are for general informational purposes only.

The primary purpose of the real property division form and worksheets is to clearly define what will happen with the real property in a dissolution action, and the agreed responsibilities of the owners/parties. See Appendix A Real Property Basics for more information about the ownership and transfer of real property.

Once signed by both owners/parties, the agreement is intended to be a binding contract enforceable by the court.

Limited License Legal Technician (LLLT) Real Property Division Scope of Practice

Under APR 28, LLLT legal services regarding the division of real property shall be limited to matters where the real property is a single-family residential dwelling with owner equity less than or equal to two times the homestead exemption¹ (see RCW 6.13.030). LLLTs shall use the form for real property division as approved by the LLLT Board.

Only real property that is either unencumbered or secured by a promissory note and deed of trust or real property contract may be divided by an LLLT. If the marital community holds real property that is encumbered by a mortgage (see 3. Encumbrances below for information on the difference between a mortgage and a deed of trust), the LLLT must advise the client to seek the direction of an attorney.

An LLLT must complete the real property form for any single-family residential dwelling owned by one or both spouses in a dissolution action when the final orders in a dissolution effectuate the division of real property held by the marital community. **It is not required if the real property is sold or refinanced prior to the entry of final orders. An LLLT should not prepare any deed to effectuate the transfer of title.**

The real property division form and worksheet and schedules do not have to be filed with the court. If the form (and any attachments) is filed, it should only be filed under seal.

Real Property Division Form and Worksheet and Schedules A-F

1. Owner Information

List all legal and equitable owners. A thorough check of all deeds recorded in the county auditor's office should reveal the name(s) of all persons on title. There may be multiple transfers of the real property over a long time period. Care must be taken to verify the chain of title is complete and accurate. A title search by a title company or litigation guarantee by a title company is strongly recommended to identify all legal owners and whether there is any cloud on title.

¹ APR 28 Regulation 2(B)2(b)

Real Property Division Form and Worksheet

Instructions

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2. Real Property, Value and Equity Information

Real Property Information

The real property must be clearly and distinctly identified, and the identification must satisfy RCW 60.04.010 and the statute of frauds and be sufficient to locate the real property without extrinsic evidence. Address information or tax parcel ID or account # alone is not sufficient to identify the real property.

Assessor's property tax parcel ID or account # may be found on the county tax assessor's website. If the property consists of more than one parcel, include all parcel ID or account #s and full legal descriptions for all parcels. If the county does not provide this information on its website, the auditor's office will have those records. This information may also be included on the deed(s).

The abbreviated and full legal description is included on the Deed of Trust (or other deed) and recorded in the county in which the real property is located. Recorded documents are available on the county's website or at the county auditor's or recorder's office. The most recent conveyance recorded should be reviewed to obtain the current legal description.

The assessed value is primarily used for the calculation of property taxes and shall not be used as the fair market value² of the real property.

Value Information

An appraisal is generally the most reliable indicator of a property's fair market value. Real property values fluctuate, sometimes greatly—an appraisal completed within the last six months is highly recommended.

A reasonable no-cost or low-cost alternative is a comparative market analysis (CMA) prepared by an experienced local licensed real estate agent. An amount based on a CMA is a non-binding value, in that a later appraisal or value determination by a lender supersedes a value provided on a CMA.

Online real estate listing sites are not reliable indicators of a property's fair market value. Although it is not recommended, if the parties choose to make their own determination of the real property's value, a written agreement must be completed using Schedule A.

Schedule A: If the real property's value is based on the owner's written agreement, complete Schedule A.

Schedule B. If there is deferred maintenance or repairs required which detract from the value of the real property, complete Schedule B.

² The fair market value is the price the property would sell for on the open market.

Real Property Division Form and Worksheet

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Equity Information

Equity is the value of the property minus the total of all encumbrances and unsecured obligations on the property. If the equity exceeds two times the homestead exemption amount in the county in which the real property is located, the division of the real property is outside of the LLLT's scope.

Determining Equity

Example 1: A property is appraised at \$300,000. The owners owe \$100,000 on their bank loan (i.e. mortgage). The equity is \$200,000.

\$300,000 (value)
- \$100,000 (loan/mortgage)
\$200,000 (equity)

Example 2: The property owners obtained several CMAs on their property, and the average value (which they agree is the fair market value) is \$250,000. The owners have both a first and second mortgage (bank loan and home equity line of credit, or HELOC) on the property for \$175,000 and \$50,000 respectively, amounting to \$225,000. The equity is \$25,000.

\$250,000 (value)
- \$175,000 (1st mortgage)
- \$50,000 (2nd mortgage/HELOC)
\$ 25,000 (equity)

Example 3: A property has an assessed value of \$350,000. The owners obtained an appraisal showing the property's fair market value is \$500,000. The owners have a first mortgage of \$100,000, and also owe a family member \$100,000. They have a written agreement with the family member to pay back the loan when they sell the house. The equity is \$300,000. (The assessed value shall not be used when determining the equity.)

\$500,000 (value)
- \$100,000 (1st mortgage)
- \$100,000 (personal loan)
\$300,000 (equity)

3. Encumbrances

An encumbrance may be a loan from a financial institution (frequently called a mortgage loan) home equity line of credit (HELOC), lien, promissory note with deed of trust, judgment, Uniform Commercial Code (UCC) filing, or other interest secured against the property.

A lien is a charge, hold claim, or other encumbrance upon the property of another as a security for some debt or charge. There are numerous types of liens, such as tax, judgment, mechanic's, or attorney's lien. In general, the lien is recorded with the county in which the real property is located.

Often, people refer to a home loan as a "mortgage," but a mortgage is not actually a loan agreement. It is the promissory note that contains the promise to repay an amount borrowed to

Real Property Division Form and Worksheet

Instructions

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buy a home/real property. A "mortgage" is a contract between an owner/borrower and the lender that creates a lien on the property. Some states use mortgages to create the lien, while other states, such as Washington, also use deeds of trust. The mortgage or deed of trust gives the lender the right to foreclose if a borrower fails to make the monthly payments or breaches the loan contract in some other way.

While mortgages and deeds of trust are similar because they are both agreements in which a borrower puts up the title to real estate as security (collateral) for a loan, these legal instruments do have some differences. For instance, mortgages and deeds of trust differ in the parties involved and, often, how the foreclosure process works.³

Schedule E: All encumbrances must be listed on the real property division form and on Schedule E.

Generally, a monthly/periodic statement from the mortgage lender or loan servicer⁴ will contain the required loan information. The mortgage lender is the financial institution that loaned the money. The mortgage servicer is the company that sends out the mortgage statements. The servicer also handles the day-to-day tasks for managing the loan.

4. Unsecured Obligations

An unsecured obligation may be a personal loan from family or friends, a fee due to a homeowner's association, or a promissory note (without a deed of trust). The unsecured obligation is any money that should be disclosed—and possibly paid—upon transfer of ownership of the real property.

Because these types of obligations are rarely recorded against the property, the owner(s) must be advised to provide all records relating to the purchase of the real property, as well as all records regarding the real property.

Schedule E: All unsecured obligations related to the real property must be listed on the real property division form and on Schedule E.

5. Total Encumbrances and Unsecured Obligations

Add the amount of all encumbrances and unsecured obligations to arrive at the total amount owed on the real property. This is the amount subtracted from the value of the real property to determine the equity. (See *Examples in section 2.*)

³ For further information regarding foreclosures in Washington, see RCW 61.24: Deeds of Trust and RCW 61.12: Foreclosure of Real Estate Mortgages and Personal Property Liens. Largely excerpted from <https://www.nolo.com/legal-encyclopedia/understanding-mortgages-deeds-trust>

⁴ See <https://www.consumerfinance.gov/ask-cfpb/whats-the-difference-between-a-mortgage-lender-and-a-servicer-en-198/>

Real Property Division Form and Worksheet

Instructions

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6. Value Adjustments

A value adjustment is an amount that may be deducted from the real property's value. Value adjustments should be based on written bids or quotes from licensed contractors for necessary repairs and/or deferred maintenance which detract from the value of the real property. Oftentimes, a lender may require certain repairs/maintenance be completed prior to refinancing a loan, or as a condition of the purchase and sale of the real property.

The repairs/maintenance must be necessary and not purely cosmetic or routine maintenance items.

Schedule B: All value adjustments must be listed on Schedule B.

7. Occupancy, Encumbrance Payment(s), Maintenance, Repairs, and Costs

Occupancy

In most cases, one owner will occupy the real property, while the other owner establishes a new residence. The non-occupying owner should be provided a reasonable timeframe to vacate the property. If a court order set a date for the non-occupying owner to vacate, that same date should be listed.

If an owner continues to occupy the real property beyond the agreed date or after the sale of the real property, the occupancy is subject to RCW 59.12.030 (1): Unlawful Detainer Defined or RCW 7.28: Ejectment; Quieting Title.

Encumbrance Payment(s) Specify who will make required loan payments, and which costs are included in the payment. If there are additional required payments, such as for unsecured obligations, include that information in the Other: section.

Routine Maintenance

The general upkeep of the real property falls under routine maintenance. It should be clear who is responsible for routine maintenance costs. Routine maintenance includes but is not limited to:

- seasonal landscaping, mowing, weeding, mulching, and trimming
- fixing small plumbing issues, such as leaks, drips, continuous running, and drain clearing
- fixing small electrical issues, such as replacing fixtures, outlets, fuses/breakers, and smoke/carbon monoxide detectors
- keeping roof, gutters and downspouts clear, cleaning exteriors surfaces, clearing driveways & sidewalks, and removing hazards
- keeping interior clean and hazard free, exterminating pests, removing rubbish, and cleaning and maintaining appliances, hot water tank, heating/cooling system, and other installed systems
- cleaning and maintaining outdoor fixtures, such as pools, hot tubs, fireplaces/firepits, and ponds

Real Property Division Form and Worksheet

Instructions

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Routine Costs

Payment for utilities associated with the real property (i.e. water, sewer, power) and minor/cosmetic repairs (i.e. paint, light bulbs, batteries) are routine costs. It should be clear who is responsible for these costs, and how reimbursement (if any) will be made.

Repair and Deferred Maintenance Costs

Costs for repairs and deferred maintenance are those items not considered routine. For example, replacing an aging furnace with a more efficient model because the old furnace no longer heats well could be considered a repair or deferred maintenance. It is not, however, an issue that would likely require replacement by a lender, therefore a value adjustment would not likely be needed.

Uncompleted repairs and maintenance which may affect the value of the real property and likely require repair in order to get financing should be listed on Schedule B.

Schedule B: All value adjustments must be listed on Schedule B.

Completion of Necessary or Agreed Repairs

It should be clear who is responsible for arranging and ensuring completion of repairs. It is recommended the owners establish a method for exchanging information or documentation as needed.

Sample Necessary Repairs/Deferred Maintenance Items

Example 1: An inspection as part of a pending refinance was completed which noted the following issues:

1. 30-year-old roof has failed and there is water damage to interior ceilings
2. concrete driveway is crumbling and has several potholes
3. two of the windows on the south side of the house are broken
4. yard is weedy, grass is overgrown, and planting beds need new mulch
5. several rain gutters and downspouts blocked

Items 1 to 3 above are necessary repairs/maintenance that may require a value adjustment.

Items 4 and 5 are routine maintenance and should not be included as a value adjustment.

8. Final Disposition Provisions

The owners must identify what is ultimately expected to happen with the real property and, if there will be a transfer of ownership, how and when that transfer will occur. If the property will be retained solely by one owner and no equity buyout is required, no additional provisions need be clarified in the real property division form. Owners may add additional provisions in section 15 as desired.

In most cases, however, the real property will be sold or refinanced and/or an equity buyout will occur.

Real Property Division Form and Worksheet

Instructions

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9. Equity Division Provisions

The amount of equity to be awarded to each owner (if any) must be listed as either a lump sum or percentage of the total.

If the real property will be sold more than two years after the entry of the final decree, the parties are to obtain an appraisal or CMA to determine the value at that time. A property value agreement using Schedule A does not suffice in this instance. Although real property values fluctuate, and current equity is not determinative of future equity, it is vital both owners/parties are aware of the real property's current value at the time of the dissolution.

10. Refinance Provisions

If the real property will be refinanced, specify the timeframe or deadline for the refinance process to be initiated, and the expected completion date. An anticipated refinance may later prove to be impossible if the owner is unable to obtain financing, or the owner expected to refinance may default, i.e. not follow through with the process. As noted in section 13, remedies for default or impossibility must be included in the final decree.

11. Sale Provisions and Default or Impossibility Provisions

If the real property will be sold, specify the timeframe or deadline for the sales process to be initiated, and the expected completion date.

Listing and Showing

One owner should be responsible for working with a realtor to list and show the real property. Agreement in advance on the listing agent/realtor is highly recommended.

Offer Acceptance

The owners must agree in advance on what constitutes an acceptable offer, particularly regarding the price.

Schedule C: Complete this schedule to document the acceptable price range and contingencies. An anticipated sale may later prove to be impossible if a prospective buyer owner is unable to obtain financing, or the owner expected to list the real property for sale may default, i.e. not follow through with the process. As noted in section 13, remedies for default or impossibility must be included in the final decree.

12. Retained or Refinanced with Future Buyout Provisions

While it is generally preferable in a dissolution to refinance the real property into only one owner's name, or to sell the real property, there are instances in which neither option appeals to the owners. As real property is often the largest asset owned by a married couple, the division of equity may play a large role in the division of marital assets.

Real Property Division Form and Worksheet

Instructions

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A future division of equity based on a refinance or sale more than two years after the entry of the final decree requires additional thought on how the buyout will occur. Additionally, if one owner is required to relinquish title (such as by signing a Quitclaim Deed), that owner's interest in the real property must be protected, and Schedule D must be completed. The final decree must include a judgment, and both a promissory note and deed of trust may need to be recorded against the real property.

Schedule D: Complete this schedule with specific details of the future equity buyout and remedies for default or impossibility.

13. Remedies in the Event of Default or Impossibility

The final decree must include these remedies. Additional remedies may also be included as agreed by the owners, such as penalties and fees.

14. Other Provisions and Required Creditor Payment from Sale Proceeds

Use this section to include owner and property specific provisions not already listed in the real property division form or schedules. If the real property is to be sold and there is a Required Creditor Payment from Sale Proceeds, Schedule F must be completed. The final decree should include sufficient detail to be enforceable in court.

Schedule F: Complete this schedule with details of any required creditor payments from sale proceeds.

15. Proposal, Temporary Agreement or Final Agreement of the Owners

The form may be completed and provided as a proposal to assist the owners in coming to agreement. The form may also be a temporary agreement while one or both owners seek additional information, such as whether refinancing is likely.

If the Final Agreement provision is checked, the form with its worksheets and schedules is intended to become a binding contract, enforceable in court.

Appendix A

Real Property Basics

The information provided on this document does not, and is not intended to, constitute legal advice; instead, all information and content are for general informational purposes only.

Property Deeds⁵

Every piece of real property in the United States is tracked or recorded. Usually, these files are kept with the County Recorder's office. They are public record, which means that anyone who wants the information can take certain steps to obtain it. It also means that when property is transferred from one owner to the next, the official documents must reflect the transfer. In fact, a failure to record the required documents accurately can undermine and even invalidate the transfer altogether.

The legal term used to describe the act of transferring real property or title to a new owner is "conveyance." A conveyance translates the wishes of the buyer and the seller into a legal document, and the transfer process happens by way of deed. The person transferring ownership is often referred to as the "grantor." The person receiving property is the "grantee."

A property deed is a formal, legal document that transfers one person or entity's rights of ownership to another individual or entity. The deed is the official "proof of transfer" for real estate, which can include land on its own or land that has a house or other building on it.

Every deed should contain the following information:

- An indication that it is a deed
- A description of the property involved
- The signature of the individual or entity that is transferring the property
- Data regarding who is taking title to the property

As deeds do not require much information, the document itself is often very short. However, the document may also contain additional information such as the conditions or assurances that go along with the transfer. Each deed must also be validly delivered to the individual taking ownership of the property. In most situations, it should also be filed with the appropriate authority as well. Every real property transfer will require the use of some type of deed. There are several types of deeds. Each type varies based on the warranties provided to the grantee. Different varieties of deeds provide varying levels of title.

Common Types of Deeds Available

The kind of deed used to transfer property will depend on title to the property. When there is a valid title, for example, the deed used to transfer that property may be different than the deed used if the title's integrity is uncertain. The following is a brief list of some of the various types of deeds available to transfer property:

- Statutory Warranty Deed

⁵ Largely excerpted from <https://www.legalnature.com/guides/what-you-need-to-know-about-deeds-and-property-transfer>

Appendix A

Real Property Basics

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- Special Warranty Deed
- Bargain and Sale Deed
- Quitclaim Deed

RCW 64.04: Conveyances provides information about the specific types of deeds used in Washington State. Descriptions of the different types of deeds may be found by searching online at reputable sources.

Title to Property

Deeds help show ownership of the property. However, the deed itself is really only used for transfer of the property. While ownership of real property in Washington State is not strictly based on whether or not an owner's name is on the title, the inclusion of an owner's name on title provides certain rights, such as the right to:

- access and occupy the property;
- place encumbrances on the property (i.e. mortgage);
- use the property as desired within legal bounds; and
- transfer the property in whole or in part.

Often, titles will be in more than one person's name. For example, if a married couple owns real property (such as their home) together, both of their names will often (but not always) be on the title. When this occurs, each spouse *generally* holds a one-half interest in the property. That also means the property cannot be transferred without both spouses' permission.

As property is held in such high regard in the United States, having a good title is critical when transferring property. Every time a property is transferred, it is recorded in a public way, usually with the County Recorder's office. When a property transfer is not recorded properly, there may be "holes" or "gaps" in the title, oftentimes called *cloud on title*. These deficiencies make ownership questionable because it is unclear whether the person who received the transfer after a gap did so validly. That is, the person transferring the property may not have had the necessary ownership rights to assign it.

These concerns about titles lead to products such as title insurance, which will indemnify losses related to defects in the title to real property. Problems associated with the title become particularly relevant if there are encumbrances or debts the owners are unaware of or to which they did not agree.

Real Property Division

If this form is filed with the court, it should only be filed under seal.

See the Real Property Division Form and Worksheet Instructions for details on completing this form.

1. Owner Information

All legal owners must be listed. ¹ The award of a property to one owner as their separate property, even without an equity division, is still the division of real property within a marital community. **If there are more than two legal owners, if there is an owner who is not a party to the dissolution, or if the owners are not married, an LLLT may not advise the client regarding the division of the real property under APR 28.**

Petitioner/Owner #1		Respondent/Owner #2	
Name		Name	
Street Address		Street Address	
City, State, Zip		City, State, Zip	
Phone		Phone	
Email		Email	

2. Real Property, Value, and Equity Information

Real Property		Value and Equity	
Street Address		Value	\$
City, State, Zip		As of (date)	
Assessor's Tax Parcel ID/Acct ²	1) # 2) #	Value Based on	<input type="checkbox"/> Property Value Agreement of the parties – Schedule A attached
Abbreviated Legal Description ³	- last recorded conveyance document (i.e. Deed of Trust/other deed) copy attached		<input type="checkbox"/> Adopted Comparative Market Analysis (CMA) ⁴ – attached
			<input type="checkbox"/> Adopted Appraisal ⁵ – attached
			Obtain an appraisal if there will be a future equity buyout.
		Total of All Encumbrances & Obligations from 3 and 4 below	\$
Current Assessed Value ⁶	\$ - current tax assessment attached	Total Equity Value less encumbrances and unsecured obligations	\$

¹ Legal owners are generally—but not always—shown on title records, deeds and/or recorded documents, as title is not determinative of character. A title search by a title company or litigation guarantee from a title company is recommended to identify all legal owners and any cloud on title.

² Assessor's property tax parcel ID or account # may be found on the county tax assessor's website. If the property consists of more than one parcel, include all other parcel and legal description information.

³ The abbreviated and full legal description is included on the Deed of Trust (or other deed) and recorded in the county in which the real property is located. Recorded documents are available on the county's website or at the county recorder's office.

⁴ A CMA is a non-binding value.

⁵ An appraisal completed within the last six months is recommended.

⁶ Assessed value is not conclusive of actual, fair market value.

Real Property Division

3. Encumbrances (mortgages, HELOCs, liens, etc.)

Complete **Schedule E** for every encumbrance.

Encumbrance 1	
Encumbrance may be a mortgage loan, home equity line of credit (HELOC), lien, promissory note with deed of trust, judgment, Uniform Commercial Code (UCC) filing, or other interest secured against the property. <i>For more than two encumbrances, attach additional sheets.</i> Attach copies of all encumbrance documents.	
Secured Party Name ⁷	
Principal Balance	\$ - Note & current statement attached
As of (date)	
Encumbrance 2 Attach copies of all encumbrance documents.	
Secured Party Name	
Principal Balance	
As of (date)	

4. Unsecured Obligations (personal loans, fees due, etc.)

Complete **Schedule E** for every unsecured obligation.

Unsecured Obligation 1	
Unsecured obligation may be a personal loan from family or friends, a fee due to a homeowner's association, or a promissory note (without a deed of trust.) <i>For more than two unsecured obligations, attach additional sheets.</i> Attach copies of all unsecured obligation documents.	
Unsecured Party Name ⁸	
Principal Balance	\$ - documentation attached
As of (date)	
Unsecured Obligation 2	
Unsecured Party Name	
Principal Balance	\$ - documentation attached
As of (date)	

⁷ A secured party may be a mortgage lender, noteholder, lienholder, or holder of a judgment. Many mortgage loan payments are made to a loan servicer, which collects payments on behalf of the actual lender or noteholder. The loan servicer should be able to provide information on the mortgage company. Federally backed loans may be searched at www.freddiemac.com and www.fanniemae.com.

⁸ An unsecured party may be a family member, friend, homeowner's association, holder of a promissory note (without a deed of trust recorded against the real property), or other party to whom money is owed, and who would have to be paid off so the real property ownership could be transferred. Unsecured obligations are not generally recorded against the real property.

Real Property Division

5. Total Encumbrances and Unsecured Obligations

This is the total amount owed, which is subtracted from the value of the property to determine the equity amount in the property before value adjustments.

Total Amount of All Encumbrances	\$
Total Amount of All Unsecured Obligations	\$

6. Value Adjustments

*Complete **Schedule B** if there are uncompleted, necessary repairs and/or deferred maintenance which reduce the value of the property.*

7. Occupancy, Encumbrance Payment(s), Routine Maintenance, Repairs, and Costs

a. Occupancy⁹

The property shall be occupied by (owner's name) _____
beginning (date)_____.

Check all that apply.

☐ The other owner, (owner's name) _____, shall vacate the property by
(date):_____.

☐ (Owner's name) _____ will occupy the property until (check one):
☐ the property is sold as specified in the dissolution decree.
☐ the property is sold for any other reason.
☐ the property is refinanced into the other owner's name.
☐ Other:

b. Encumbrance Payment(s) (i.e. mortgage, loans)

Check all that apply.

☐ All encumbrance payment(s) will be made by (owner's name) _____.

☐ Encumbrance payment(s) will be made as follows: _____
(describe the payment method and any due dates).

☐ Encumbrance payments made by (owner's name) _____ shall be offset
against any sale proceeds.

☐ Other:

The payment(s) includes (check all that apply):

- ☐ principal
- ☐ interest
- ☐ property taxes
- ☐ insurance premiums

⁹ Occupancy is subject to RCW 59.12.030(1) and RCW 7.28.

Real Property Division

☐ Other:

c. Routine Maintenance

The real property shall be maintained in a safe and livable condition, either at or better than its current condition. Decisions on routine maintenance will be made by:_____.

Routine maintenance costs, such as interior/exterior upkeep, will be paid by (*owner's name*) _____.

Routine maintenance costs are (*check one*):

- ☐ subject to reimbursement from the marital community (receipts required).
- ☐ not subject to reimbursement.
- ☐ subject to reimbursement if over \$_____.
- ☐ Other:

This owner shall continue to pay routine maintenance costs until (*check one*):

- ☐ the property is sold as specified in the dissolution decree or for any other reason.
- ☐ the property is refinanced into the other owner's name.
- ☐ Other:

d. Routine Costs

Routine costs shall be paid timely to avoid the property becoming subject to utility liens, and to help prevent the property failing into disrepair due to a lack of heat or sewer service or other reasons. Decisions on routine costs will be made by:_____.

Check one.

- ☐ Routine costs, including but not limited to utilities and minor/cosmetic repairs, will be paid by (*owner's name*) _____
- ☐ Routine costs will be paid as follows:_____

e. Repair and Deferred Maintenance Costs

Decisions on repair and deferred maintenance will be made by:_____. Costs to repair the property prior to sale or refinance (*check all that apply*):

- ☐ Does not apply. There are no repair or deferred maintenance costs.
- ☐ are shown on **Schedule B** (attached) and will be deducted from the property's net value prior to the division of equity.
- ☐ will be paid as follows:_____
(*describe who will pay for repairs and maintenance and whether/how costs will be reimbursed*)
- ☐ Other:

Real Property Division

f. Completion of Necessary or Agreed Repairs

(Owner's name) _____ is responsible for (check all that apply):

- ☐ obtaining bids/quotes for repairs.
- ☐ authorizing repairs.
- ☐ ensuring repairs are timely completed.
- ☐ Other:

8. Final Disposition Provisions

If the property will be sold, refinanced by one owner, or if one owner must buy out the other owner without refinancing the property, complete all sections below. *Check one.*

- ☐ Does not apply. The property will not be sold or refinanced as a requirement of the final decree and neither owner is required to buy out the other owner's interest in the property. **Skip to section 14.**
- ☐ The property will be refinanced into one owner's name only, who will buy out the other owner's equity at the time the refinance is completed. (*detailed in section 10.*)
- ☐ The property will be sold. (*detailed in section 11.*)
- ☐ The property will be retained by one owner, who will buy out the other owner's equity at a date more than two years in the future. (*detailed in section 12.*)
- ☐ The property will be retained by one owner via a Veteran's Administration (VA) loan assumption. (*complete section 9 or 11 as needed*)
- ☐ Other:

9. Equity Division Provisions

List dollar amount or percentage of equity each owner will receive upon refinance or sale of the property. If one owner is buying out the other owner without refinancing the property, list the amount of the equity to be paid as a buyout.

Current Equity ¹⁰ <i>Choose one:</i>		Owner 1 will receive	Owner 2 will receive
<input type="checkbox"/>	\$ _____	\$ _____ OR % _____	\$ _____ OR % _____
<input type="checkbox"/>	There is no equity to be divided. Skip to section 10.		
Payment of Equity/Buyout (after deducting closing costs and cost of repairs)			

¹⁰ Current equity is not determinative of future equity. If the property will be sold more than two years after the entry of the final decree, the parties agree to obtain an appraisal prior to listing for sale to determine the current value.

Real Property Division

Check one: <input type="checkbox"/> Owner 1 <input type="checkbox"/> Owner 2 <input type="checkbox"/> Both owners	Shall receive their portion of equity (check one):	<input type="checkbox"/>	as a lump sum payment on or before date/time period: _____ i.e. dd/mm/yyyy, or no later than <u>X</u> months from final order entry/other event (if more than two years complete Section 12.)
		<input type="checkbox"/>	as a future buyout as described in section 12.
		<input type="checkbox"/>	as a lump sum when youngest child turns 18 or graduates high school, whichever occurs last, but in no event after the youngest child turns 19.
		<input type="checkbox"/>	Other:

10. Refinance Provisions

Check one.

[] Does not apply. **Skip to section 11.**

[] (Owner's name) _____ will refinance the property solely in their name. This owner shall be responsible for timely initiating and completing the refinance. The other owner will be paid their share of equity upon the completion of the refinance. Both owners shall timely cooperate in providing and signing any necessary documents required to refinance the property into one owner's name, including any deed required to transfer the vesting of the property.

[] Other:

Refinance Timeframes			
Refinance shall be INITIATED on or before	<input type="checkbox"/>	Date: _____ dd/mm/yyyy	
	<input type="checkbox"/>	Time period: _____ Example: No later than <u>x</u> months from final order entry	
	<input type="checkbox"/>	Other: Example: By _____ date unless interest rate drops below _____%, and then by _____ date	
Refinance is EXPECTED TO BE COMPLETED on or before	<input type="checkbox"/>	Date: _____ dd/mm/yyyy	
	<input type="checkbox"/>	Time period: _____ Example: No later than <u>x</u> months from final order entry	
	<input type="checkbox"/>	Other: Example: By _____ date unless interest rate drops below _____%, and then by _____ date.	
Refinance Costs			
Refinance costs will be paid by: This includes but is not limited to loan closing costs.	<input type="checkbox"/>	Owner 1	\$ _____ OR % _____

Real Property Division

	<input type="checkbox"/>	Owner 2	\$ _____ OR % _____
--	--------------------------	---------	---------------------------

If the refinance is not initiated or completed as expected, then (*check all that apply*):

- ☐ The remedies as described in section **13** shall apply.
- ☐ The property shall be sold as described in section **11**.
- ☐ Other:

11. Sale Provisions and Default or Impossibility Provisions

Completion of this section is required if the property will be sold, refinanced, or if there is an equity buyout provision.

Check all that apply.

- ☐ The property will be sold within the next two years.
- ☐ The property will be sold more than two years in the future. (Also complete section **12**.)
- ☐ These provisions apply only in the event of default or impossibility of the intended final property disposition as indicated in section **8**.

Default means an owner did not meet a requirement of this agreement. For example, if an owner was required to initiate a refinance by a certain date and chose not to apply, or if an owner chose not to make required payments or repairs, then a default has occurred.

Impossibility means an owner was unable to meet a requirement of this agreement due to unanticipated circumstances. For example, if an owner was unable to qualify for a refinance, was unable to sell the property due to market conditions, or was unable to make payments or repairs due to incapacity, then impossibility of performance has occurred.

Both default and impossibility must be contemplated in the division of real property, and related provisions and remedies must be described on this form.

Both owners shall timely cooperate in providing and signing any necessary documents required to sell the property.

Sale Timeframes	
The property shall be LISTED FOR SALE on or before	<input type="checkbox"/> Date: _____ dd/mm/yyyy
	<input type="checkbox"/> Time period: _____ Example 1: No later than <u>x</u> months from final order entry Example 2: <u>xx</u> days after default or impossibility has occurred.
	<input type="checkbox"/> Other:
	<input type="checkbox"/> Date: _____ dd/mm/yyyy

Real Property Division

The sale is EXPECTED TO BE COMPLETED on or before	<input type="checkbox"/>	Time period: _____ <i>Example: No later than <u>x</u> months from final order entry</i>
	<input type="checkbox"/>	Other:

If the property is not listed for sale, or the sale is not completed as expected, then (*check one*):

- [] The remedies as described in section **13** shall apply.
[] Other:

a. Listing and Showing

Both owners shall cooperate to make the property available as needed, such as for showings or open houses. The property shall be maintained in a clean and orderly state.

Check all that apply.

- [] The listing agent is (*agent's name*) _____.
[] The listing price is \$ _____.
[] (*Owner's name*) _____ will arrange showings.
[] The listing and showing details are not yet determined. (*Owner's name*) _____ is responsible for (*check all that apply*):

- [] choosing the listing agent.
[] determining the listing price.
[] arranging showings.
[] Other:

b. Offer Acceptance

Complete and attach **Schedule C**.

12. Retained or Refinanced with Future Buyout Provisions

Check one:

- [] Does not apply. **Skip to section 13.**
[] The property will be retained by or refinanced solely into the name of (*owner's name*) _____ on a date that is more than two years in the future. The owner retaining or refinancing the property shall remain current on all encumbrances. The other owner will receive a buyout of their share of equity in the property as described below and in section **9**.

Check one:

- [] Both owners shall remain legal co-owners on title (also called tenants in common) of the property until the buyout is completed or the property is sold.

Real Property Division

☐ (Owner's name) _____ shall transfer title to the other owner prior to the completion of the buyout. On or before the date of transfer of title the owners shall complete **Schedule D** which describes how payment will be made. **The final decree shall include the information on Schedule D in the form of a judgment.**

☐ A promissory note and deed of trust or mortgage shall be recorded against the property on or before _____.

☐ Other:

13. Remedies in the Event of Default or Impossibility

When there are post-decree events which may require enforcement remedies, the final decree shall include the following statements:

Once an owner becomes aware of default or impossibility, that owner must notify the other owner. The non-defaulting owner has a right to enforce the provisions of this agreement. The defaulting owner shall be responsible for all attorney's fees and costs, and any costs incurred relating to curing the default.

If the defaulting owner fails to promptly sign documents, the other (non-defaulting) owner is authorized to have the commissioner or clerk of the court sign any documents necessary to enforce this agreement, ex parte without notice to the defaulting owner.

☐ Prejudgment interest shall accrue at _____%

☐ Other:

14. Dispute Resolution

Any disputes about this Real Property Division form or what it means shall be resolved by:

☐ Binding arbitration on the written materials only. The arbitrator shall be:

_____.

☐ Mediation with _____.

☐ Other:

15. Other Provisions

Check one:

☐ Does not apply.

☐ The following other provisions apply (*specify*):

☐ Required Creditor Payment from Sale Proceeds applies.

Complete and attach Schedule F.

Real Property Division

[] Other:

16. Proposal, Temporary Agreement or Final Agreement of the Owners

This agreement is a (*check one*):

[] Proposal presented by (*owner's name*) _____ and expires _____ (*date/time period*). It is protected by Evidence Rule (ER) 408 as a settlement proposal and neither enforceable nor evidence of actual value or agreement.

[] Temporary agreement of the owners if signed below. The agreement is temporary because the parties have not yet obtained all information and documentation required to make a final agreement, or the court will make the final determination of the division of property.

[] Final agreement of the owners if signed below, and replaces any temporary agreement.

I declare under penalty of perjury of the laws of the state of Washington that the facts I have provided on this form and any attachments are true.

Owner 1		Owner 2	
Printed Name		Printed Name	
Signature		Signature	
Date		Date	
Represented by		Represented by	
Signature		Signature	
Date		Date	

Limited Licensed Legal Technician (if any):

Prepared with the assistance of a Family Law Legal Technician.

▶ _____ *LLLT signs here* _____ *Print name and WSBA #* _____ *Date*

Schedule A

to Real Property Division

Property Value Agreement

If this form is filed with the court, it should only be filed under seal.

1. Owner(s) and Property Address

Petitioner/Owner #1		Respondent/Owner #2	
Name		Name	
Real Property			
Street Address			
City, State, Zip			

2. Value Agreement – do not use this schedule if equity buyout is two or more years in the future; in that case, obtain an appraisal or CMA.

Owners agree the property's value is set at \$_____ as of (date) _____. This value shall be the value used to determine the amount of equity in the property, after total encumbrances and value adjustments (if any).

The owners have based the property value on (*check all that apply*):

- ☐ appraisal(s).
- ☐ CMA(s).
- ☐ an online search of the property. Printouts of each website searched showing the estimated value of the property are attached.
- ☐ an online search of similar properties. Printouts of each website searched showing the estimated value of similar properties are attached.
- ☐ Other:

Owner 1		Owner 2	
Printed Name		Printed Name	
Signature		Signature	
Date		Date	

Schedule B

to Real Property Division

Repair and Deferred Maintenance Value Adjustments

If this form is filed with the court, it should only be filed under seal.

1. Owner(s) and Property Address

Petitioner/Owner #1		Respondent/Owner #2	
Name		Name	
Real Property			
Street Address			
City, State, Zip			

2. Value Adjustments

Use this section to describe necessary repairs/maintenance which detract from the value of the property. Unless otherwise agreed in writing by both parties, costs shall be based on reasonable written quotes/estimates and/or contractor bids. **Attach copies of estimates, bids or receipts.**

Generally, only lender-required repairs should be included. Cosmetic or routine maintenance issues should not be listed here.

Description of required repairs/maintenance – attach additional sheets as needed

Cost of Repairs/Value Adjustment	\$ - cost estimates & contractor bids attached	Covered by Insurance?	<input type="checkbox"/> No <input type="checkbox"/> Yes

Schedule B
to Real Property Division
Repair and Deferred Maintenance Value Adjustments

If this form is filed with the court, it should only be filed under seal.

Owner 1		Owner 2	
Printed Name		Printed Name	
Signature		Signature	
Date		Date	

Schedule C

to Real Property Division

Offer Acceptance Provisions

If this form is filed with the court, it should only be filed under seal.

1. Owner(s) and Property Address

Petitioner/Owner #1		Respondent/Owner #2	
Name		Name	
Real Property			
Street Address			
City, State, Zip			

2. Offer Contingencies

Check all that apply.

☐ An offer contingent upon the buyer's sale of their own property ☐ will ☐ will not be accepted.

☐ An offer contingent upon the buyer's inspection of the property ☐ will ☐ will not be accepted.

☐ The contingency must be satisfied within _____ days (30 days if left blank).

☐ Other:

3. Offer Acceptance Provisions

An offer within (\$/%) _____ of the listed price must be accepted. This is the upset price.

If repairs are required by the lender as a result of an inspection, then the costs of the repairs shall be deducted from the list price before the upset price will apply.

If the property has not sold within _____ days, then an offer within (\$/%) _____ must be accepted.

Other Provisions:

Schedule C
to Real Property Division
Offer Acceptance Provisions

If this form is filed with the court, it should only be filed under seal.

Owner 1		Owner 2	
Printed Name		Printed Name	
Signature		Signature	
Date		Date	

Schedule D

to Real Property Division

Future Buyout Provisions

Use only when equity buyout will be made more than 2 years in the future

If this form is filed with the court, it should only be filed under seal.

1. Owner(s) and Property Address

Petitioner/Owner #1		Respondent/Owner #2	
Name		Name	
Real Property			
Street Address			
City, State, Zip			

2. Future Buyout Provisions

- ☐ Buyout shall be made as follows (provide detailed description including dates/time periods, owner responsibilities, and amounts if different from section 9 of the Real Property Division form):

3. Remedies in the Event of Default or Impossibility

All remedies described on this schedule shall be included as provisions written into the final decree.

Check all that apply.

- ☐ The remedies as described in section 13 of the Real Property Division form apply.
☐ The following remedies apply:

Schedule D
to Real Property Division
Future Buyout Provisions

Use only when equity buyout will be made more than 2 years in the future

If this form is filed with the court, it should only be filed under seal.

Owner 1		Owner 2	
Printed Name		Printed Name	
Signature		Signature	
Date		Date	

Schedule E

to Real Property Division

Encumbrances and Unsecured Obligations

If this form is filed with the court, it should only be filed under seal.

1. Owner(s) and Property Address

Petitioner/Owner #1		Respondent/Owner #2	
Name		Name	
Real Property			
Street Address			
City, State, Zip			

2. Encumbrance Information

Encumbrance	
Encumbrance may be a mortgage loan, home equity line of credit (HELOC), lien, promissory note, judgment, Uniform Commercial Code (UCC) filing, or other interest secured against the property. <i>For more than one encumbrance, complete additional schedules.</i> Attach copies of all encumbrance documents.	
Secured Party Name	
Mailing Street Address	
City, State, Zip	
Physical Street Address	
City, State, Zip	
Phone	
Fax	
Email	
Principal Balance	\$ - Note & current statement attached
As of (date)	
Monthly Payment	\$
Most Recent Payment Date	
Next Payment Due Date	

Schedule E

to Real Property Division

Encumbrances and Unsecured Obligations

If this form is filed with the court, it should only be filed under seal.

Payment Includes:	<input type="checkbox"/>	Annual property taxes
	<input type="checkbox"/>	Annual insurance
Taxes Not in Payment	\$	
Insurance Not in Payment	\$	
VA Assumable Loan?	<input type="checkbox"/>	No
	<input type="checkbox"/>	Yes – attached
Balloon Payment ¹ ?	<input type="checkbox"/>	No
	<input type="checkbox"/>	Yes \$_____ due on _____ - Note attached
Lis Pendens ² filed?	<input type="checkbox"/>	No
	<input type="checkbox"/>	Yes – attached
Any Other Cloud on Title? ³	<input type="checkbox"/>	No
	<input type="checkbox"/>	Yes – attached

3. Unsecured Obligation Information

Unsecured Obligation	
Unsecured obligation may be a loan from family or friends, a promissory note (without a deed of trust), or a fee due to a homeowner's association. <i>For more than one unsecured obligation, complete additional schedules.</i> Attach copies of all unsecured obligation documents.	
Unsecured Party Name	
Mailing Street Address	
City, State, Zip	
Physical Street Address	
City, State, Zip	

¹ A balloon payment is a lump sum principal balance payment due at the end of the loan term.

² A lis pendens is an official, public notice that a property has a pending lawsuit or claim attached to it.

³ A title search by a title company or litigation guarantee from a title company is recommended in order to identify all legal owners and any cloud on title. A cloud on title is any document, claim, unreleased lien or encumbrance that might invalidate or impair a title to real property or make the title doubtful.

Schedule E

to Real Property Division

Encumbrances and Unsecured Obligations

If this form is filed with the court, it should only be filed under seal.

Phone			
Fax			
Email			
Principal Balance	\$	- documentation attached	
As of (date)			
Monthly Payment	\$		
Most Recent Payment Date			
Next Payment Due Date			
Balloon Payment?	<input type="checkbox"/>	No	
	<input type="checkbox"/>	Yes \$ _____ due on _____ - - documentation attached	
Lis Pendens filed?	<input type="checkbox"/>	No	
	<input type="checkbox"/>	Yes – attached	
Any Other Cloud on Title?	<input type="checkbox"/>	No	
	<input type="checkbox"/>	Yes – attached	

Owner 1		Owner 2	
Printed Name		Printed Name	
Signature		Signature	
Date		Date	

Schedule F

to Real Property Division

Required Creditor Payment from Sale Proceeds

If this form is filed with the court, it should only be filed under seal.

1. Owner(s) and Property Address

Petitioner/Owner #1		Respondent/Owner #2	
Name		Name	
Real Property			
Street Address			
City, State, Zip			

2. Creditor Payment Information

Use this section to detail creditor payments that must be paid out of real property sale proceeds, either prior to or after disbursement to owners. The final dissolution decree should include sufficient detail to be enforceable in court.

Creditor Payment	
Creditor payments may include credit card balances, loan balances, legal fees, or other unsecured debts. <i>For more than one creditor, complete additional schedules.</i>	
Creditor Name	
Mailing Street Address	
City, State, Zip	
Physical Street Address	
City, State, Zip	
Phone	
Email	
Payment Amount ¹	\$

¹ Payment amount may be the entire outstanding balance or may be a certain dollar amount; use specific dollar amounts whenever possible.

Schedule F
to Real Property Division
Required Creditor Payment from Sale Proceeds

If this form is filed with the court, it should only be filed under seal.

Payment Deadline	<input type="checkbox"/>	Payment shall be made prior to the disbursement of net sale proceeds. <i>Owners/parties will receive their share of net sale proceeds only <u>after</u> this payment has been made.²</i>
	<input type="checkbox"/>	_____ (owner's name) shall make this payment within _____ (days/months) of receipt of net sale proceeds. <i>Owners/parties will each receive their share of net sale proceeds, out of which this payment must then be made.</i>
	<input type="checkbox"/>	Other:

Owner 1		Owner 2	
Printed Name		Printed Name	
Signature		Signature	
Date		Date	

² All payments to be made prior to the disbursement of net sale proceeds to the owners/parties should be included in escrow closing instructions.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT FORM

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 FY2024 (October 1, 2023 – September 30, 2024). 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.

Name of Entity:	Legislative Review Committee
Entity Size:	12
Chair or Co-Chairs:	Matt LeMaster
Staff Liaison:	Sanjay Walvekar, Legislative Affairs Manager, COMM
Board of Governors Liaison(s):	Mary Rathbone
Purpose of Entity:	
The WSBA Legislative Review Committee (Committee) reviews internal legislative proposals before making a recommendation for sponsorship or support to the Board of Governors (BOG). The Committee's primary purpose is to ensure that WSBA-request legislation fulfills GR12 and is vetted both internally and externally. The Committee may also consider non-WSBA proposals submitted to the committee for the purpose of seeking WSBA input and support. WSBA-request bills approved by the Board are introduced in the upcoming legislative session.	
Strategy to Fulfill Purpose:	
The Committee determines if a legislative proposal fulfills GR 12.2. If the Committee determines a legislative proposal fulfills GR 12.2 the Committee conducts a thorough analysis of the issue, discusses details with the WSBA entity offering the proposal, and ensures input is included from a broad stakeholder network.	
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"?	

October 1, 2023 – September 30, 2024 (FY24)

The Committee serves the public, members of the Bar, and the legal profession by vetting and recommending legislation that improves the practice of law and the administration of justice.	
2022-2023 Entity Accomplishments:	
The Committee received and reviewed two legislative proposals – one from the Business Law Section’s Corporate Act Revision Committee (CARC) and one from the Real Property, Probate & Trust (RPPT) Section - and forwarded these proposals to be reviewed by the BOG for WSBA request legislation. The Committee vetted these proposals and determined that they fulfilled GR 12.2 requirements. The Committee conducted a thorough analysis of relevant issues and discussed details with representatives of CARC and RPPT. Then, the Committee voted to recommend sponsorship of both proposals. This recommendation was approved by the BOG; however, the BOG later voted to decline sponsorship of the RPPT proposal due to negative feedback from the WSBA membership and potential legal risk. The CARC bill retained Bar sponsorship, reached final passage, and was signed into law by Governor Inslee during the 2024 legislative session.	
Looking Ahead: 2024-2025 Top Goals & Priorities:	
1	The Committee will continue to work collaboratively with WSBA entities to thoroughly vet and analyze legislative proposals impacting the practice of law and our justice system.
Please describe how this entity is addressing diversity, equity, and inclusion: <i>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?</i>	
Committee appointments follow WSBA’s diversity guidelines and the Committee includes representatives from multiple districts, a variety of practice areas, new/young lawyers, gender, race/ethnicity and other factors. Although it has a narrow focus, the Committee strives to include all members’ perspectives and achieve consensus decision-making.	
Please share feedback regarding the support and engagement provided by WSBA.	
The Committee utilizes the expertise of the WSBA’s Legislative Affairs Manager and Legislative Affairs staff in all of the committee’s work. The Committee also works closely with the BOG Governor assigned to ensure that it considers a BOG perspective in how the committee accomplishes its work. The Committee is critical in using its expertise to ensure the BOG only receives properly worked and vetted proposals before the Committee votes to recommend that the BOG support, sponsor, etc. legislation proposals and that recommendation is ultimately considered by the BOG at its November meeting. The BOG could work with the Committee to consider ways the Committee and BOG can better serve WSBA sections in helping with legislative proposals that impact the practice of law.	
Entity Detail & Demographics Report: <i>To Be Completed by WSBA Staff</i>	
Size of Entity:	12
Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i>	12

Number of Applicants for FY25: <i>Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25).</i>	12	
Budgeted Direct Expenses: <i>As of September 30, 2024</i>	\$1,250	
FY24 Indirect Expenses: <i>As of September 30, 2024.</i>	\$28,612	
FY24 Demographics: The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership. Aside from the factors marked (*), demographic information was provided voluntarily, and individuals had the option to not respond to any or all of the factors below.		
Disability	No	60%
	Yes	20%
	Chose Not to Respond	20%
District*	2	40%
	3	10%
	6	10%
	7N	20%
	8	10%
	10	10%
Ethnicity	Multi-Racial or Bi-Racial	10%
	White or European Descent	70%
	Chose Not to Respond	20%
Gender	Female	20%
	Male	50%
	Non-Binary	10%
	Chose Not to Respond	20%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	10%
	Heterosexual	70%
	Chose Not to Respond	20%

The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

ⁱ 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.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Legal Technology Task Force
Chair or Co-Chairs:	Jenny Durkan
Staff Liaison:	Kevin Plachy, Director of the Advancement Department; Margeaux Green, Practice Management Advisor. Both in Advancement Department
Board of Governors Liaison:	Kari Petrasek, Jordan Couch
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
The Legal Technology Task Force, led by Jenny Durkan, was created in response to the Board of Governors' recognition in November 2023 of the transformative impact of technology, particularly artificial intelligence (AI), on the legal profession. As one of its four strategic priorities for the 2023-24 fiscal year, the BOG set the goal to "assess technology-related opportunities and threats and determine WSBA's role vis-a-vis regulation, consumer protection, and support to legal professionals." The 15-month Task Force is charged with assessing the legal technology landscape, identifying both threats and opportunities, and making recommendations that promote the ethical and effective use of technology, while enhancing equitable access to justice. To achieve these objectives, the Task Force divided its work into four key areas: 1) Key Emerging Technologies, 2) Impacts on Practice, Access to Justice, and Consumer Protection, 3) Impact on Courts, Court Rules, and Procedures, and 4) Education and Ethics.	
Strategy to Fulfill Purpose:	

The Legal Technology Task Force chose to focus on four key points during FY24.

1. Establish deadlines for deliverables.
2. Establish four workgroups: 1) Key Emerging Technologies, 2) Impacts on Practice, Access to Justice, and Consumer Protection, 3) Impact on Courts, Court Rules, and Procedures, and 4) Education and Ethics.
3. Draft survey questions to send to 10,000 WSBA members (deployed in October 2024).
4. Educate members via a field trip to the Microsoft Campus.
5. Update the Member Engagement Council.
6. Provide interim and final reports to the WSBA Board of Governors. The Final report will provide recommendations on tangible steps the WSBA can take to support and strengthen the use of technology within the legal profession in Washington state.

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"?

1) The Task Force is working to assess the legal technology landscape across various sectors of the legal profession, including private practice, courts, public interest, and legal education. By identifying threats and opportunities, the Task Force aims to provide the WSBA with recommendations on how to prioritize and integrate technology in ways that benefit members and the public. (2) It is articulated in the charter that the Task Force will use the Washington State Supreme Court's Access to Justice Tech Principles as a guide in its work and recommendations. (3) The Task Force actively seeks input from WSBA members through a survey developed to understand their use of and challenges with technology with the ability to analyze particular demographic groups to determine disparate impacts. This feedback will inform final recommendations on how technology can support and enhance access to justice while promoting the ethical use of innovative tools within the legal profession.

2023-2024 Entity Accomplishments:

Establishment of Task Force and Chair Appointment: The WSBA Legal Technology Task Force was created following the approval of its charter by the BOG on March 7, 2024. Jenny Durkan was appointed as the Chair by the WSBA President and her appointment was confirmed by the BOG.

Appointment of Task Force Members: The Chair appointed members to the Task Force: 1) Voting: Michele Carney, Laura Lemire, Nicholas Pleasants, Kenneth Zigler, Patrick Palace, Kirk Arthur, Drew Simshaw, Judge Sean O'Donnell, Judge Christon Skinner, Margaret Chon. (2) Non-Voting Members: Kari Petrasek (BOG Liaison), Professor Leigha LeighAnne Thompson (Ex Officio), Craig Shank (POLB Liaison). The Task Force met for the first meeting in May 2024 and held monthly meetings thereafter.

Appointment of Ad Hoc Members: In August 2024, Chair Jenny Durkan appointed 11 new ad hoc members to support the workgroups and enhance their capacity: Faisal Akhter, Jacob Wall, Dan Lear, Carol Mullins-Hayes, Leslie Volez, Joshua Hawkins, Leslie English, Joshua Field, Rebecca Garland, Jacqueline Schaefer, John Bender, Denise Farr, Matt Dyor, Jonathan Franklin.

Workgroup Establishment and Charters: The Task Force successfully established four workgroups and drafted charters for each: (1) Key Emerging Technologies Workgroup (2) Impacts on the Practice of Law, Access to Justice, and Consumer Protection Workgroup (3) Impacts on Courts, Rules, and Procedures Workgroup (4) Education and Ethics Workgroup.

Creation of Timeline for Deliverables: A timeline for deliverables was created, guiding the Task Force's work through its 15-month duration.	
Survey Drafted for Member Input: The Task Force drafted a survey for WSBA members to gather input on technology adoption, challenges, and needs. The survey was distributed to 10,000 members in October 2024 to help shape the Task Force's recommendations.	
First Quarterly Update to Member Engagement Council: The Task Force provided its first quarterly update to the Member Engagement Council in July 2024, summarizing progress on workgroup establishment and ongoing efforts.	
Microsoft Tour of CELA: In September 2024, the Task Force participated in a field trip to Microsoft's campus to meet with a team of attorneys, data scientists, engineers, and business professionals from the Corporate, External, and Legal Affairs (CELA) team. The group explored Microsoft's Digital Crimes Unit and its cross-disciplinary approach to combating cybercrime, gaining insights on the intersection of technology and legal practice.	
Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities: <i>SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.</i> <i>SMART Goals are: Specific, Measurable, Relevant and Time-Bound</i>	
1	Deliver Final Report to the WSBA Board of Governors: The Task Force will submit its final report, including recommendations on technology adoption, ethical considerations, and access to justice, to the WSBA BOG by August 2025. The final report will be reviewed and approved by the Task Force in or before June 2025, with drafts circulated for feedback by May 1, 2025. The report will outline key findings from the workgroups and will include tangible steps to support the legal profession's use of technology.
2	Complete Member Survey and Analyze Results: The Task Force will analyze the results of the October 2024 member survey, assessing member awareness, adoption, and challenges related to emerging legal technologies. The insights from this survey will inform the Task Force's final recommendations.
3	Submit Regular Workgroup and Preliminary Reports: The Task Force will submit regular workgroup progress reports and a preliminary report to the BOG as outlined in its timeline to ensure consistent updates. The Task Force will also deliver quarterly updates to the Member Engagement Council. Workgroup reports will be submitted to the Chair on October 15, 2024, January 3, 2025; March 4, 2025; and April 4, 2025. A preliminary report for is due to the Chair by December 4, 2024, with a delivery date to the BOG in January 2025. The final draft report will be submitted to the Chair for distribution to the Task Force for review by May 1, 2025, with the final version delivered to the Board of Governors by August 2025.
Looking Ahead: <i>Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.</i>	
1	N/A – this entity concludes in August 2025

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

How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?

The Task Force addresses diversity, equity, and inclusion by ensuring broad representation in its membership, which includes attorneys from diverse practice areas, career stages, geographic locations, and marginalized communities. Guided by the Washington State Supreme Court's Access to Justice Tech Principles, the Task Force fosters inclusive decision-making through diverse workgroups and actively solicits input from all members. It also gathers member feedback through a survey developed to analyze impacts to particular demographic groups to ensure its recommendations reflect the needs of the WSBA members.

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*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

The support and engagement by WSBA has been excellent. The two staff members who have provided primary support are Kevin Plachy and Margeaux Green. They have been superb in helping manage the process, in anticipating next steps and needs of the task force and in facilitating with other "parts" of WSBA. The BOG has been very responsive and involved, both through the excellent liaison, Kari Petrasek, and through the Membership Engagement Council. We have also had great connectivity with the CPE, which is so important given the ramifications of emerging technology. We have also been able to connect and coordinate with efforts by a Washington State Supreme Court Justice and the Attorney General's office. The Task Force has successfully navigated some complex and overlapping issues because of WSBA support.

Entity Detail & Demographics Report:
To Be Completed by WSBA Volunteer Engagement Advisor

Size of Entity:

(Include voting and non-voting members)

28

Number of Vacancies for FY25:

28

Number of Applicants for FY25:

61

FY24 Demographics:

Demographic information is not available for this entity.

To: Washington Supreme Court
From: MCLE Board
Date: September 26, 2024
RE: **2023-2024 MCLE BOARD ANNUAL REPORT**

Background & Purpose

The Mandatory Continuing Legal Education (MCLE) Board derives its authority from the Washington Supreme Court. Under Admission and Practice Rule (APR) 11(d)(2), the MCLE Board is authorized to accredit courses and educational programs that satisfy the educational requirements of the mandatory CLE rule, consider MCLE policy issues, determine and adjusts fees, consider member and sponsor petitions for waivers from requirements and appeals from decisions, and suggest amendments or regulations to APR 11. The MCLE Board is comprised of six (6) WSBA members and one (1) community member. On average, the MCLE Board meets five times a year.

MCLE Board Accomplishments and Activities

During the 2023-2024, the MCLE Board reviewed 74 petitions of undue hardship, completed Board review on 3 activity applications, suggested amendments to Admission and Practice Rule 11, revised the standards for approving structured mentoring programs, updated the definitions used in the MCLE Board approved undue hardship matrix, and participated in diversity equity and inclusion training and discussion facilitated by the WSBA Equity and Justice Leads.

Mentoring Policy

Under APR 11(e)(8), members can earn credit for participating in an approved mentoring program. The MCLE Board is charged with developing the standards of approval for a mentoring program, and organizations interested in obtaining board approval of a program must submit an application. Currently, members can earn credit by participating in a structured mentoring program approved by the MCLE Board or developing their own self-directed plan that must adhere to established guidelines and complete plan forms. For either option, both the mentor and mentee have to be active bar members. Recently, the MCLE Board decided to expand its policy to allow MCLE credit to those mentoring law students, those enrolled in the law clerk program, recent JD graduates, and inactive members who plan to be licensed in WA state when participating in certain approved structured mentoring programs. This policy expands the pool of participants who can be considered a mentee for MCLE credit purposes, but the requirement that a mentor be an active member of the bar for at least five years and in good standing remains unchanged. It also excludes self-directed mentoring programs as these programs do not have the degree of oversight that exists in mentoring programs devised and monitored by organizations that have sought and obtained approval from the Board. This policy change reflected in the Revised Standards for Approving Structured Mentoring Programs (enclosed herein) will be



referred to both the Board of Governors and the Supreme Court pursuant to the notice requirement per APR 11 (d)(2)(ii).

Petitions & Board Decisions

At each meeting, the MCLE Board reviews petitions that have been submitted on the basis of undue hardship. Per APR 11(i)(5): “a lawyer, LLLT, or LPO may file with the MCLE Board an undue hardship petition for an extension, waiver, and/or modification of the MCLE requirements.”

All petitions are first reviewed by the MCLE staff liaison and approved, denied, or forwarded to the MCLE Board based on the Board-approved decision matrix, which defines applicable hardships. The MCLE Board reviews appeals of denials and holds hearings at the request of licensed legal professionals who may appeal a denial by the MCLE Board to the Supreme Court.

The MCLE Board expanded the undue hardship matrix to match the language included in the Paid Family and Medical Leave Act, which takes a broad view of who is recognized as a family member. It defines the term as “child, grandchild, grandparent, sibling, or spouse...and also includes any individual who regularly resides in the employee’s home or where the relationship creates an expectation that the employee care for the person, and that individual depends on the employee for care...” RCW 50A.05.010. The act also affords leave to individuals to allow them to bond with a new child born or placed into their family and provides leave when a family member is about to be deployed overseas or is returning from overseas deployment. The former was incorporated into the Board’s definition of parental leave and the latter into the existing definition of military leave. Overall, laws such as the Washington Paid Family and Medical Leave Act employ inclusive language and definitions that the MCLE Board drew upon when considering a more encompassing reform of the hardship matrix.

Update on Recent Amendments to APR 11

Law Clerk Credit

On September 1, 2023, the adopted amendments to APR 11 allowing MCLE credit for law clerk tutors went into effect. This change recognizes the work performed by law clerk tutors as valuable continuing legal education for themselves, as well as the education they provide to APR 6 law clerks. As of September 16, 2024, law clerk tutors have submitted and received MCLE credit for sixty-seven approved activities.

Equity Credit Requirement¹

Effective September 1, 2022, and starting with the 2023-2025 reporting period, one of the six required ethics credits must be earned in the subject of equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law. To date, 2,150 activities covering this subject have been approved.

Diversity, Equity and Inclusion

The MCLE Board will continue to examine and work to increase the diversity of the MCLE Board. The MCLE Board continues to seek board members who represent diversity in geography and all other

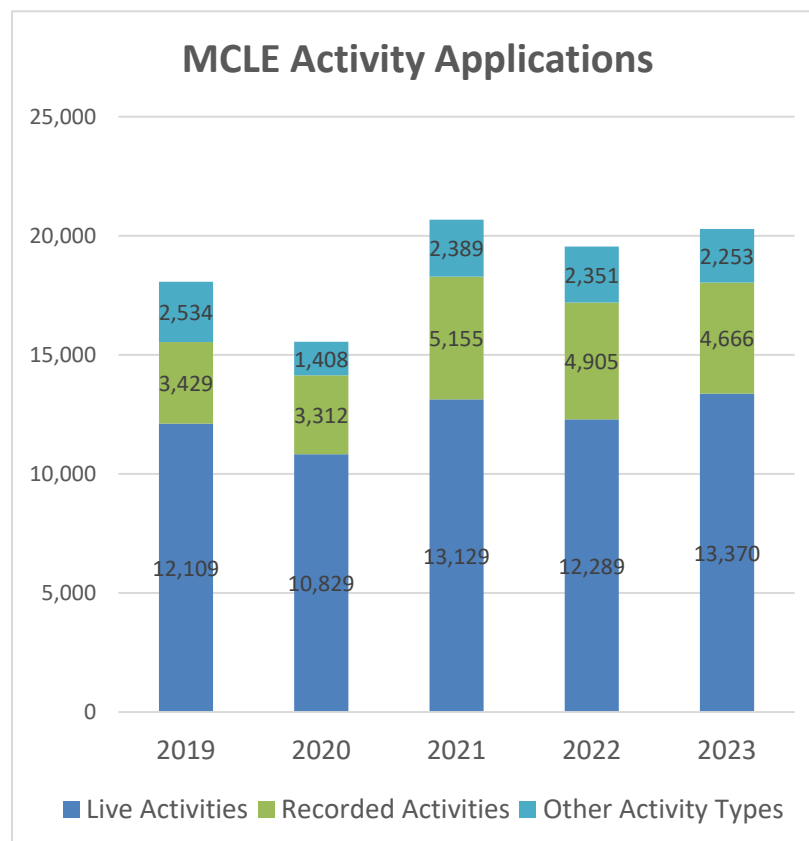
¹ APR 11 (c)(1)(ii) requires licensed legal professionals to earn “...at least one credit in equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law.”

diversity criteria used by the WSBA. Additionally, the Board routinely receives and considers input from petitions filed by WSBA members affected by the MCLE rules. The MCLE Board participates in diversity, equity, and inclusion trainings. The recent changes to the undue hardship matrix and the mentoring policy reflect the MCLE Board's commitment to fostering inclusivity, diversity, and equity. The MCLE Board fosters an atmosphere of civility and collegiality insofar as how the Board receives comments from WSBA members, staff, fellow board members, and others. This is accomplished by active listening and respectful discussion. Consistency in the application of the rules is maintained by active discussion on the merits of each issue brought before the MCLE Board. The MCLE Board aims to achieve Board consensus whenever possible.

MCLE Activity Applications & Certifications Review

The MCLE Board has delegated approval of courses to the WSBA's MCLE staff. MCLE analysts regularly review CLE course submissions and accredit activities per standards outlined in APR 11. Hundreds of CLE activity applications are received each month from both sponsors and WSBA members. MCLE analysts review and approve thousands of activity applications each year. In 2023, 20,289 applications were reviewed by MCLE analysts and approved for MCLE credit.

In addition to CLE activity reviews, MCLE staff reviews all certifications from members who are due to report their MCLE compliance. As MCLE reporting and certification are based on a three-year reporting period, MCLE analysts review and verify that the MCLE requirements are completed for one-third of the active membership each year. This last year that totaled more than 10,424 certifications.



Certification for the 2022-2024 Reporting Period

Over 11,000 lawyers, LPOs, and LLLTs are due to earn their required credits by December 31, 2024, and certify by February 3, 2025.² Typically, MCLE certification opens as part of license renewal in November. This year, to ensure that all the recent online system updates are functional before licensing opens in November, we have enabled certification through the MCLE online earlier than usual and as of September 16th, 755 licensed legal professionals are compliant for the 2022-2024 reporting period.

Attachments:

1. 2024-2025 MCLE Board Roster
2. Undue Hardship Decision Matrix
3. FY 24 Budget Summary
4. Revised Standards for Approving Structured Mentoring Programs

² Since February 1 falls on a Saturday this year, both the licensing and MCLE certification deadline was moved to the next business day.

Attachments:

1. 2024-2025 MCLE Board Roster
2. Undue Hardship Decision Matrix
3. FY 24 Budget Summary
4. Revised Standards for Approving Structured Mentoring Programs

2024-2025 MCLE Board Roster

2024-2025 MCLE BOARD ROSTER
(Updated 9/16/2024)

Katharine Denmark (Chair)
18145 SE 42nd Pl
Issaquah, WA 98027-9716
katiedenmark@gmail.com
Term Expires: 9/30/2025 (first term)

M. Christopher Bueter
Michael Christopher Bueter
8526 Interlake Ave N
Seattle, WA 98103-4028
(574) 575-0472
christopher.bueter@gmail.com
Term Expires: 9/30/2025 (second term)

Darryl Elliott Colman
Office of Superintendent of Public Instruction
600 Washington St SE
(360) 725-6162
darryl.colman@gmail.com
Term Expires: 9/30/2026 (first term)

Merri Hartse
2020 E 36th Ave
Spokane, WA 99203-4046
(509) 209-0004
hartsem@hotmail.com
Term Expires: 9/30/2025 (second term)
Public Member

Efrem Robert Krisher
115 141st Pl NE
Bellevue, WA 98007
(425) 891-3079
ekrisher@gmail.com
Term Expires: 9/30/2027 (second term)

Henry Phillips
1301 2nd Ave Ste 3000
Seattle, WA 98101-3800
henry.phillips@morganlewis.com
(206) 274-6400
Term Expires: 9/30/2027 (first term)

Brendon Taga
1600 Chester Ave
Bremerton, WA 98337-1600
(360) 792-6050
brendontaga@alumni.upenn.edu
Term Expires: 9/30/2026 (first term)

BOG Liaison:
Kevin Fay
KevinFayBOG@yahoo.com

Staff Liaison:
Adelaine Shay
MCLE Manager
(206) 727-8249
adelaines@wsba.org



Undue Hardship Decision Matrix

EXTENSION (EXT) REQUESTS MATRIX

Reason No.	SITUATION <i>Applies to first period of non-compliance, and multiple consecutive periods of non-compliance.</i>	DECISION
EXT 1	(1) Significant medical hardship of self or immediate family member for whom member is primary support; and (2) Requested extension deadline is in the same calendar year in which the lawyer is due to report.	* First request -- grant extension with reasonable deadline * Second request -- refer to the MCLE Board
EXT 2	(1) Death of immediate family member which caused lawyer hardship (e.g., emotional, physical, financial, scheduling); and (2) Requested extension deadline is in the same calendar year in which the lawyer is due to report.	* First request -- grant extension with reasonable deadline * Second request -- refer to the MCLE Board
EXT 3	(1) Financial hardship -- due to (a) being unemployed or employed with poverty-level wages; (b) major medical expense for self or family member; or (c) bankruptcy; and (2) Requested extension deadline is in the same calendar year in which the lawyer is due to report.	* First request -- grant extension with reasonable deadline * Second request -- refer to MCLE Board
EXT 4	On an active military assignment in a location where it is possible to access CLE courses but military obligations do not allow enough time to complete credits by the deadline.	* First request -- grant extension with reasonable deadline * Second request -- refer to MCLE Board
EXT 5	Immediate family member is about to be deployed overseas or is returning from overseas deployment within the last 3 months of the reporting period.	* First request -- grant extension with reasonable deadline * Second request -- refer to the MCLE Board
EXT 6	Took parental leave within the last year of member's reporting period.	* First request -- grant extension with reasonable deadline * Second request -- refer to the MCLE Board
EXT 7	All other requests	Deny or Refer to Board

*"Immediate family member" as defined by RCW 50A.05.010 "as child, grandchild, parent, grandparent, sibling, or spouse of [the member] and also includes any individual who regularly resides in the [member's] home or where the relationship creates an expectation that the [member] care for the person, and that individual depends on the [member] for care. "Family member" includes any individual who regularly resides in the [member's] home, except that it does not include an individual who simply resides in the same home with no expectation that the [member] care for the individual."

CREDIT MODIFICATION (MOD) DECISION MATRIX

Reason No.	SITUATION <i>Applies to first period of non-compliance, and multiple consecutive periods of non-compliance.</i>	DECISION
MOD 1	Significant medical hardship of self or immediate family member for whom lawyer is primary support.	Grant as appropriate
MOD 2	Death of immediate family member which caused lawyer hardship (e.g., emotional, physical, financial, scheduling).	Grant as appropriate
MOD 3	Financial hardship (as defined by the "First Time Late Fee Waiver Requests Decision Criteria" table)	Grant as appropriate
MOD 4	All other reasons	Deny

*"Immediate family member" as defined by RCW 50A.05.010 "as child, grandchild, parent, grandparent, sibling, or spouse of [the member] and also includes any individual who regularly resides in the [member's] home or where the relationship creates an expectation that the [member] care for the person, and that individual depends on the [member] for care. "Family member" includes any individual who regularly resides in the [member's] home, except that it does not include an individual who simply resides in the same home with no expectation that the [member] care for the individual."

EXEMPTION (EXM) DECISION MATRIX

Reason No.	SITUATION <i>Applies to first period of non-compliance, and multiple consecutive periods of non-compliance for EXM 3 only. For EXM 1&2, for multiple consecutive periods of non-compliance, bring to board.</i>	DECISION Note: If a waiver is approved and some credits have already been completed, grant the waiver only for the number of credits still needed for compliance. There should be no carry-over as a result of this waiver.
EXM 1	(1) Significant medical hardship of self or immediate family member for whom member is primary support; and (2) Petition is filed by certification deadline; and (3) <u>Less</u> than 15 credits due of which no more than 2 are ethics.	*Grant.
EXM 2	(1) Significant medical hardship of self or immediate family member for whom member is primary support; and (2) Petition is filed by certification deadline; and (3) 15 or <u>more</u> credits still due and/or more than 2 ethics credits due.	*Grant request if medical hardship is for lawyer and: (a) is life-threatening; or (b) is of long duration (in years); or (c) lawyer is 75 or older. All others: Deny request and grant extension instead
EXM 3	On active military assignment in remote location or on a domestic base where it is difficult to access CLE courses.	Grant.
EXM 4	All other requests.	Deny.

*"Immediate family member" as defined by RCW 50A.05.010 "as child, grandchild, parent, grandparent, sibling, or spouse of [the member] and also includes any individual who regularly resides in the [member's] home or where the relationship creates an expectation that the [member] care for the person, and that individual depends on the [member] for care. "Family member" includes any individual who regularly resides in the [member's] home, except that it does not include an individual who simply resides in the same home with no expectation that the [member] care for the individual."

LATE FEE WAIVER DECISION CRITERIA

Note: If "Credits by 12/31" is "Y," then late fee was assessed because certification was submitted after the February 1 deadline.

Y* = Complete at time petition considered

No.	SITUATION	CREDITS BY 12/31?	CREDITS DONE After 12/31?	CERTIFIED?	1st Non- Comp RP	>1 Con- secutive Non- Comp RP	DECISION
MEDICAL HARDSHIP/DEATH <ul style="list-style-type: none"> "Immediate family member" as defined by RCW 50A.05.010 "as child, grandchild, parent, grandparent, sibling, or spouse of [the member] and also includes any individual who regularly resides in the [member's] home or where the relationship creates an expectation that the [member] care for the person, and that individual depends on the [member] for care. "Family member" includes any individual who regularly resides in the [member's] home, except that it does not include an individual who simply resides in the same home with no expectation that the [member] care for the individual." 							
A1	Significant medical hardship of self or immediate family member for whom licensed legal professional is primary support, or Death of immediate family member which caused lawyer hardship (e.g., emotional, physical, financial, scheduling)	Y/N	Y*	Y/N	X		Waive if certification submitted or once it is submitted.
A2	Significant medical hardship of self or immediate family member for whom licensed legal professional is primary support, or Death of immediate family member which caused lawyer hardship (e.g., emotional, physical, financial, scheduling)	Y/N	Y*	Y/N		X	Reduce or waive [depending on the circumstance] if certification submitted or once it is submitted.
A3	Significant medical hardship of self or immediate family member for whom licensed legal professional is primary support, or Death of immediate family member which caused lawyer hardship (e.g., emotional, physical, financial, scheduling)	N	N	Y/N	X	X	<15 credits remaining = Reduce or waive [depending on the circumstance] if Certification submitted by the deadline (with all credits needed for compliance completed). >15 credit remaining = Refer to the Board

[illegible]

No.	SITUATION	CREDITS BY 12/31?	CREDITS DONE After 12/31?	CERTIFIED?	1st Non- Comp RP	>1 Con- secutive Non- Comp RP	DECISION
D1	MILITARY -- See header criteria	Y/N	Y*/N	Y*/N	X		Waive late fee.
D6	MILITARY -- See header criteria	Y/N	Y*/N	Y/N		X	Refer to the Board
	MAIL DELIVERY PROBLEM						
D7	Claims certified by 2/1.	Y	Y*	Y*	X	X	Grant if licensed legal professional establishes timely certification or if administrative error; otherwise deny.
	MILITARY FAMILY						
E1	If immediate family member is deployed overseas or is returning from overseas deployment in the last 3 months of member’s reporting period. Waive if approximately half of credit requirement is remaining (22 total credits for lawyers or 15 total credits for LLLT/LPOs), No fee waiver if more than half of credits remaining.						
MIS-INFORMATION FROM WSBA / LICENSED LEGAL PROFESSIONAL'S FAILURE TO LEARN MCLE REQUIREMENTS							
F1	Reports that certification completed online by 2/1 and it was the <u>first time</u> licensed legal professional certified online. Certification was not submitted correctly, therefore 2/1 deadline not met.	Y		Y*	X	X	Waive the late fee once certification has been completed successfully. (This policy was passed by the Board on 3/19/10.)
F2	Reports being told by WSBA staff certification not needed	Y/N	Y*	Y*/N	X	X	Deny
F3	Licensed legal professional reports receiving other errant information from the WSBA [and it was reasonable for the licensed legal professional to be dependent on the information] or other WSBA administrative error occurred causing the late fee.	Y	Y*	Y*	X	X	Reduce or waive the late fee depending on the circumstances.

No.	SITUATION	CREDITS BY 12/31?	CREDITS DONE After 12/31?	CERTIFIED?	1st Non- Comp RP	>1 Con- secutive Non- Comp RP	DECISION
F4	Licensed legal professional reports receiving the previous petition decision letter after the deadline that had to be met for a fee reduction.	Y	Y*	Y*	X	X	Reduce or waive the late fee depending on the circumstances.
	SPONSOR MIS-ADVERTISEMENT						
G1	Short credits due to sponsor error or mis-advertisement of CLE credits (if < or = 2 credits)	See note	See note	Y	X	X	Grant if * At least 43 credits are in reporting period * Shortfall made up in timely manner after notification of misaccreditation * All credits needed for compliance are complete * Certification is complete
	MISC. REASONS FOR NON-COMPLIANCE						
K1	Certified reporting period roster with a duplicate course; deletion of the course causes credit non-compliance after 12/31. * All other credits were taken within the RP * < or = 4 credits need to be taken to make up credit deficiency. * Credits made up and certified in a timely manner. * Never late before.	Y		Y	X		Reduce late fee to \$75 [<u>wave</u> \$75]. if payment postmarked/delivered to the WSBA by the deadline.
K2	Busy practice / Oversight / Other non-medical or non-financial hardship reason [See "Misc." list below]						Deny
	MISC. REASONS FOR NON-COMPLIANCE						
	Claims mailed certification to WSBA but not received by WSBA.						
	Class that licensed legal professional planning to take cancelled at last minute and licensed legal professional still has time in reporting period to take needed credits.						

No.	SITUATION	CREDITS BY 12/31?	CREDITS DONE After 12/31?	CERTIFIED?	1st Non- Comp RP	>1 Con- secutive Non- Comp RP	DECISION
	Did not know certification had to be submitted since all credits are on the MCLE web site (even though instructions about requirement for certification is in APR 11, and in the July 1st letter, in the NW Lawyer FYI column Sept.-April each year, on the certification forms in the annual license packet and in all email reminders about license renewal).						

Fiscal Year 2024
August MCLE Budget Summary

Washington State Bar Association

Statement of Activities

For the Period from August 1, 2024 to August 31, 2024

92% OF YEAR COMPLETE

	FISCAL 2024 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MANDATORY CONTINUING LEGAL EDUCATION						
REVENUE:						
ACTIVITY APPLICATION FEE	550,000	57,200	665,500	(115,500)	121%	161,333
ACTIVITY APPLICATION LATE FEE	220,000	16,450	246,700	(26,700)	112%	45,033
MCLE LATE FEES	190,000	1,200	267,375	(77,375)	141%	93,208
ANNUAL ACCREDITED SPONSOR FEES	36,000	500	37,250	(1,250)	103%	4,250
ATTENDANCE LATE FEES	90,000	7,950	112,550	(22,550)	125%	30,050
COMITY CERTIFICATES	27,800	500	29,822	(2,022)	107%	4,339
TOTAL REVENUE:	1,113,800	83,800	1,359,197	(245,397)	122%	338,214
DIRECT EXPENSES:						
DEPRECIATION	130,449	10,736	112,728	17,721	86%	6,850
STAFF MEMBERSHIP DUES	500	-	500	-	100%	(42)
MCLE BOARD	5,000	-	-	5,000	0%	4,583
STAFF TRAVEL/PARKING	50	-	-	50	0%	46
STAFF CONFERENCE & TRAINING	4,000	3,464	3,564	436	89%	103
TOTAL DIRECT EXPENSES:	139,999	14,200	116,792	23,207	83%	11,540
INDIRECT EXPENSES:						
SALARY EXPENSE (5 88 FTE) **	454,500	28,723	417,018	37,482	92%	(393)
BENEFITS EXPENSE	155,895	11,316	131,366	24,529	84%	11,538
OTHER INDIRECT EXPENSE	173,235	9,268	140,236	33,000	81%	18,564
TOTAL INDIRECT EXPENSES:	783,630	49,307	688,619	95,011	88%	29,708
TOTAL ALL EXPENSES:	923,629	63,507	805,411	118,218	87%	41,249
NET INCOME (LOSS):	190,171	20,293	553,786	(363,615)	291%	379,463

**Budget reallocations apply to this line item For details, see FY24 Budget Reallocations memo(s) included in the Board of Governors meeting materials

Revised Standards for
Approving Structured Mentoring Programs

STANDARDS FOR APPROVING STRUCTURED MENTORING PROGRAMS FOR MCLE CREDIT
Adopted by MCLE Board on August 9, 2024

The MCLE Board will approve structured mentoring programs for MCLE credit that meet the requirements of APR 11 and the following requirements and standards:

1. **Purpose.** Structured mentoring programs are intended to:
 - a. Foster professionalism, civility and collegiality in the legal community;
 - b. Bridge the gap for new and transitioning attorneys;
 - c. Promote inclusion and eliminate bias with respect to the practice of law;
 - d. Encourage professional development, including insights into the practice of law;
 - e. Encourage personal development, including the need for healthy work-life balance and awareness of mental health, addiction, and stress issues; and/or
 - f. Support the community through public service.
2. **Structured Mentoring Program Standards.** The minimum structural standards for a program to be approved include facilitating and requiring the mentor and mentee to:
 - a. Attend an orientation meeting for which MCLE credit is not earned;
 - b. Sign a mentoring agreement;
 - c. Create a personalized mentoring plan that includes meetings on approved subjects under APR 11(f);
 - d. Have face-to-face mentoring meetings related to the approved course subjects under APR 11(f). Face-to-face meetings can be in person or via electronic means of communication; and
 - e. Provide an evaluation of the mentoring experience to the organization. The forms or the information from the forms must be retained for two years and provided to the MCLE Board upon request.
3. **Goals of Approved Structured Mentoring Programs.** Approved Structured Mentoring Programs should:
 - a. Strive to appropriately match qualifying mentors with qualifying mentees;
 - b. Assist mentors and mentees in creating a mentoring plan that will best serve them in achieving their goals; and
 - c. Provide support as needed to help mentors and mentees fulfill their responsibilities.
4. **Application for Approval of Structured Mentoring Program.** Organizations shall submit an application, program materials and sample forms to the MCLE Board to be considered for approval.

5. **Self-Directed Structured Mentoring Programs.** Mentors and mentees wishing to develop their own mentoring relationship and attain MCLE credit for mentoring may do so through the Self-Directed Structured Mentoring Program Guide available at <https://www.wsba.org/for-legal-professionals/mcle/mcle-credit-for-mentorship>.
6. **Eligibility.** The mentor and mentee shall not be employed by the same employer. Those using the WSBA provided “Self-Directed Mentoring Program Guide” must mentor active members of the WSBA to obtain MCLE credits.
7. **Mentor Eligibility.** The mentor must be an active member of the WSBA in good standing and have been admitted to the practice of law in Washington for at least five years.
8. **Mentee Eligibility.** To be eligible, the mentee must:
 - a) be an active member of the WSBA; or
 - b) be an inactive member of the WSBA who intends to return to active status within one year; or
 - c) be a J.D. graduate seeking admission in Washington; or
 - d) be an enrolled law student who has successfully completed not less than one third of a law school’s prescribed 3-year course of study or 16 months of a law school’s prescribed 4-year course of study; or
 - e) be an enrolled law clerk who has successfully completed not less than 16 months of the law clerk’s program prescribed 4-year course of study; or
 - f) have completed the APR 6 law clerk program.

Prior to commencing a mentoring relationship under this policy, mentees who are inactive members, law school students, or participating in the law clerk program must certify in writing their intention to complete all steps to obtaining an active WSBA license by signing the MCLE Board mentoring agreement.

9. **MCLE Credit for Participation.** Mentors and mentees may earn one MCLE credit per each 60 minutes during which they held mentoring meetings and covered topics or issues related to the approved course subjects under APR 11(f). Law and Legal Procedure credits may not be earned through mentoring. There are no limits on the number of MCLE ethics and “other” credits attorneys may earn and attorneys may participate as often as they wish. The mentor may not receive payment for the mentoring time.

Mandatory Continuing Legal Education (MCLE) Board

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.

Disability	No	86%
	Chose Not to Respond	14%
District*	0	29%
	1	24%
	6	14%
	7S	14%
	8	14%
	9	10%
	10	14%
Ethnicity	Multiracial, biracial	14%
	White or European Descent	71%
	Chose Not to Respond	19%
Gender	Female	29%
	Male	57%
	Chose Not to Respond	14%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual or Queer	14%
	Heterosexual	57%
	Chose Not to Respond	29%

The Yes/No response for the Sexual Orientation category is data from a previous demographic question 'Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?' This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

WASHINGTON STATE B A R A S S O C I A T I O N

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Member Engagement Council
Chair or Co-Chairs:	Francis Adewale and Matthew Dresden
Staff Liaison:	Kevin Plachy and Jennifer Olegario
Board of Governors Liaison:	None
Purpose of Entity:	
The Council shall seek to educate members in a proactive manner about WSBA's and Board of Governor's actions and work, seek input from and involve members in decision-making process, build relationship between members and WSBA governance and ensure ongoing updates of members on WSBA processes and measurement. In carrying out these lofty goals, the council shall seek to create mutual understanding between the board and members, drive board priorities, form relationships with WSBA sections, specialty, minority and regional bars and share opportunities across regions of the state and members resident outside the geographical area of the state. The Council will serve as an advisory body to the Board of Governors as set forth in the WSBA Bylaws.	
Strategy to Fulfill Purpose:	
Seek active engagement with members through (1) direct communication with voluntary bars, WSBA sections, and minority bar associations, and (2) a quarterly survey administered by the Member Engagement Council.	
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"?	

By identifying ways to enhance member engagement with the Board and the organization, WSBA will be able to better fulfill its mission by (1) attracting a larger and more diverse pool of volunteers to serve on committees, boards, and sections; (2) more effectively providing member benefits and services of value to members that will advance their ability to serve their clients and the public with the highest degree of professionalism and competence; and (3) staying connected to the membership through regular feedback mechanisms, thereby enabling the organization to adapt to the changing needs in the profession and ensuring the services and benefits provided to members are relevant to the needs of the profession and the public.

2023 -2024 Entity Accomplishments:

Received FY23 Year-End report on Member Perception survey results from NBRI. Also administered quarterly surveys for FY24 and reviewed results.

Received feedback from members about their dissatisfaction with the address and resident agent requirements. Subsequently, received information from WSBA Regulatory staff about their intention to request that the Supreme Court remove the requirement.

Worked with WSBA staff to develop the Member Well-Being Task Force charter. Reviewed the charter, provided feedback, and forwarded the final charter to the Board of Governors with a recommendation to approve it. The BOG approved this recommendation. Co-Chairs Francis Adewale and Matthew Dresden and staff liaison Kevin Plachy reviewed the applications for Chair of the task force and recommended the person to serve as Chair to the WSBA President. They also reviewed the applicants for members of the task force and recommended a slate of members to the WSBA President for appointment.

Worked with WSBA staff to develop the Legal Technology Task Force charter. Reviewed the charter, provided feedback, and forwarded the final charter to the Board of Governors with a recommendation to approve it. The BOG approved this recommendation. Co-Chairs Francis Adewale and Matthew Dresden and staff liaison Kevin Plachy reviewed the applications for Chair of the task force and recommended the person to serve as Chair to the WSBA President. They also reviewed the applicants for members of the task force and recommended a slate of members to the WSBA President for appointment.

Worked with WSBA's Volunteer Engagement Advisor to develop a board recruitment policy.

Developed a member survey regarding proposals for WSBA Deskbooks. Reviewed the survey results and worked with WSBA Communications staff on a recommendation to expand member access to deskbooks free of charge, by subsidizing more licenses to libraries that allow members to check out deskbooks for free. The BOG approved this recommendation.

Received the first quarterly update from both the Legal Technology and Member Well-Being Task Forces in July 2024.

Received feedback from sections on a potential revision of the fiscal policy to allow sections to use their funds to purchase alcohol. No recommendations were developed in FY24.

Implemented the WSBA Communities platform as a pilot project, which will continue into next fiscal year.

Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities:

<i>Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound</i>	
1	Continue to conduct NBRI Quarterly Surveys and review the results.
2	Receive information and provide input on the Bar Leaders' Summit scheduled to take place in FY24.
3	Receive quarterly updates from the WSBA Legal Technology Task Force.
4	Receive quarterly updates from the WSBA Well-Being Task Force.
5	Continue to review information about the potential change to the WSBA Fiscal Policies to allow sections to utilize their funds to purchase alcohol.
6	Take up any tasks/initiatives assigned by the Board of Governors.
Looking Ahead: <i>Please share any long-term goals and/or priorities that your entity aims to address.</i>	
1	This entity may play a role in vetting the recommendations generating from the Legal Technology Task Force and the Member Well-Being Task Force.
2	Continue to strengthen connections with the county bars, MBAs and other members throughout the state.
<p>Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in 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 in the profession? Other?</i></p>	
<p>The Council is seeking ongoing input (specifically in the NBRI survey) from the members on their perceptions of whether WSBA is effectively addressing diversity, equity and inclusion issues and whether WSBA upholds the values of diversity, equity and inclusion. The Council will continue to monitor those results.</p>	
Please share feedback regarding the support and engagement provided by WSBA.	
<p>WSBA staff has been top-notch: efficient, productive, responsive, and a delight to work with. In particular, Kevin Plachy, Sara Niegowski, and Jenn Olegario have provided invaluable contributions. Kevin was the guiding force behind the creation of both task forces, from creating the initial drafts of the charters to recruiting applicants to assisting with the selection of the chair and then the task force members. Sara has done masterful work managing the surveys and developing the now-adopted plan regarding deskbooks. And Jenn has enthusiastically taken on the role of engaging with voluntary bars, MBAs, and sections to set up a Bar Leaders' Summit.</p>	
<p align="center">Entity Detail & Demographics Report: <i>To Be Completed by WSBA Volunteer Engagement Advisor</i></p>	
Size of Entity: <i>(Include voting and non-voting members)</i>	11

Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i>	3
Number of Applicants for FY25: <i>Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i>	3
Budgeted Direct Expenses: <i>As of September 30, 2024.</i>	\$1,000
Indirect Expenses: <i>As of September 30, 2024.</i>	\$17,748
FY24 Demographics: The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership. Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.	
Disability	No 56%
	Yes 11%
	Chose Not to Respond 33%
District*	0 1%
	1 22%
	2 11%
	3 11%
	5 11%
	6 11%
	9 11%
	10 22%
Ethnicity	Asian – South Asian 11%
	Black, African American, of African Descent 11%
	White, or European Descent 44%
	Chose Not to Respond 34%
Gender	Female 22%
	Male 33%
	Chose Not to Respond 45%
Sexual Orientation	Heterosexual 44%
	No 11%
	Chose Not to Respond 45%
The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual,	

transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

ⁱ 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.

WASHINGTON STATE B A R A S S O C I A T I O N

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Member Well-Being Task Force
Chair or Co-Chairs:	Justin Bingham
Staff Liaison:	Dan Crystal, Adely Ruiz, and Kevin Plachy
Board of Governors Liaison:	Nam Nguyen
Purpose of Entity:	
The Task Force seeks to (1) study well-being among WSBA members and the broader legal community in Washington and (2) make recommendations to enhance well-being for those same individuals and thereby improve the provision of legal services. The Task Force will draw on the considerable and influential existing body of work compiled by national and state legal organizations, most prominently The Path to Lawyer Well-Being: Practical Recommendations for Positive Change, authored by the National Task Force on Lawyer Well-Being, a coalition of organizations including the National Organization of Bar Counsel (NOBC), the Association of Professional Responsibility Lawyers (APRL) and the American Bar Association's Commission on Lawyer Assistance Programs (CoLAP). Following publication of the report in 2017, both the ABA and the Conference of Chief Justices passed resolutions urging all states to review and consider the report's 44 recommendations. Subsequently, 26 states have formed well-being committees and another eight states have held well-being conventions or "summits." In November 2023, at the recommendation of the Member Engagement Council (MEC), the WSBA Board of Governors (BOG) voted to adopt member wellness as an organizational priority. Creating a Well-Being Task Force (which was also part of the MEC's recommendation) is the first step in acting on that priority.	
Strategy to Fulfill Purpose:	

The Task Force's primary objective will be to create a report synthesizing the Task Force's research and recommending tangible steps WSBA can take to enhance well-being among WSBA members and the broader legal community in Washington. This objective will be achieved by accomplishing two subsidiary objectives: 1. Create Workgroups to Research Well-Being Across the Various Sectors of the Legal Profession in Washington and the U.S. By the end of its second meeting, the Task Force will establish multiple workgroups to research well-being across various sectors of the legal profession. The workgroups will be comprised of Task Force members and additional non-voting members if desired, such as WSBA employees and members of relevant associations (e.g., Superior Court Judges Association, District and Municipal Court Judges Association, and Appellate Judges Association). The workgroup members will be appointed by the Chair of the Task Force, with consent of a majority of the task force members. 2. Create a Workgroup to Investigate Well-Being Among WSBA Members The Task Force will also form a workgroup to investigate well-being among WSBA members. This workgroup's primary goal will be to develop and deploy a member survey by no later than the end of the Task Force's first year. Areas of inquiry for the survey may include the relative well-being of members, the identification of challenges in legal practice, the occurrence of mental health conditions or illness, and suggestions for the Task Force. The workgroup may also solicit member feedback through listening sessions, focus groups, and other forms of interaction. The workgroup will provide a final report to the full Task Force, containing its findings and recommendations.

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"?

The ultimate goal of the task force is to study well-being within the legal profession in WA and other states and make recommendations to enhance well-being for WSBA members and thereby improve the provision of legal services.

2023 -2024 Entity Accomplishments:

During the course of its first few meetings the taskforce received two presentations. The first presentation was from Kyra Hazilla from the Oregon Attorney Assistance Program. Kyra reviewed the Oregon Taskforce's report and their process in studying member wellbeing during the duration of their taskforce. The second presentation was from Heidi Alexander, Director of Massachusetts Supreme Judicial Court Standing Committee on Lawyer Well-Being. Heidi's presentation included a review of the Massachusetts report, the national lawyer well-being movement, and the Institute for Well Being in Law's (IWIL) work, as well as Massachusetts process in drafting its report.

The three workgroups are as follows: 1. Private Practice Workgroup, 2. Law Student/New Member Workgroup, 3. Member Survey Workgroup. Chair Bingham assigned task force members to the three workgroups, assigned a Chair for each workgroup, and reviewed expectations of the workgroups which are memorialized in workgroup charters. In that process he made the following appointments of Chairs and members: Private Practice Workgroup: Chair Annasara Purcell; Members: Kyle Sciuchetti, Melissa Berry, Darcel Lobo; Law Student/New Member Workgroup: Chair Susan Lee; Members: Bushra Rahim, Justice Raquel Montoya-Lewis; Member Survey Workgroup: Chair Emily Arneson; Members: Laura Moss, Michael Finkle, Justin Bingham, and Sara Smucker Barnwell. Chair Bingham has also recommended that each workgroup recruit three ad-hoc members. The Private Practice and Law Student/New Member workgroups will run until December, 2024 and the Member Survey Workgroup will run until June 2025.

Recruited Professor Matt Thiese from University of Utah to assist the task force with development of the member survey. Professor Thiese has helped a few other states develop similar surveys and was

highly recommended. Professor Thiese will assist with development of the survey and analysis of the survey results when they are available.	
Provided a quarterly update to the Member Engagement Council in July, 2024.	
Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities: <i>Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound</i>	
1	The task force will establish two more workgroups in January 2025 which will focus on Suicide, Addiction and Burnout and Judicial, Rules, and Regulatory. Those two workgroups are scheduled to run through May 2025. In July 2025 three more workgroups will be established focusing on DEI and Well-Being, Government, Legal Aid, and LAP/Member Wellness Programs. Those workgroups are scheduled to run through November 2025.
2	Will provide quarterly updates to the Member Engagement Council in November 2024, February 2025, May 2025, and August 2025.
3	Will provide an interim report/update to the WSBA Board of Governors in May 2025.
4	Will deploy member survey on well-being in January 2025 and plan to have full analysis of the survey done by the end of March, 2025.
Looking Ahead: <i>Please share any long-term goals and/or priorities that your entity aims to address.</i>	
1	The task force will be working to compile its final report to the Board of Governors which will be due in March, 2026.
Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in 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 in the profession? Other?</i>	
The Task Force will be considering the impacts of DEI on well-being within the legal profession in WA State. We will integrate DEI considerations into the survey and we will be establishing a workgroup devoted to the study of DEI and Well-Being in FY25.	
Please share feedback regarding the support and engagement provided by WSBA.	
Support from WSBA staff has been exceptional. Kevin Plachy, Dan Crystal, and Adely Ruiz have provided continuous assistance with taskforce planning and implementation. Kevin has provided much needed project management support, while Dan and Adely have provided subject matter expertise. WSBA staff support has been key to the taskforce's launch and initial success. SharePoint services provided by WSBA has given the taskforce a platform for collaboration. SharePoint will be key as we move into the report writing phase of the taskforce. The taskforce is lucky to have extensive BOG involvement. Not only do we have an assigned BOG liaison; one of our most active members, Emily Arneson, has recently joined the BOG! This strong connection will be very helpful as the taskforce moves into its second year.	
Entity Detail & Demographics Report: <i>To Be Completed by WSBA Volunteer Engagement Advisor</i>	

Size of Entity: <i>(Include voting and non-voting members)</i>	11
Number of Vacancies:	11
Number of Applicants for FY25:	40
FY24 Demographics: Demographic information is not available for this entity.	

ⁱ 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.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Pro Bono & Public Service Committee
Chair or Co-Chairs:	Erin Ream, Parvin Price
Staff Liaison:	Joyce Diaz Sandi; Equity & Justice Specialist
Board of Governors Liaison:	Tom Ahearne
Purpose of Entity:	
The Pro Bono and Public Service Committee serves WSBA members by communicating opportunities and eliminating barriers to providing pro bono services to communities that experience poverty and injustice.	
Strategy to Fulfill Purpose:	
The PBPSC Chose the following priorities for FY24: <ol style="list-style-type: none">1. Second Annual Pro Bono Fall Fair – Offering 3 CLE credits with three sessions: Pro Bono Stories, Pro Bono Ethics, and View from the Bench2. Article introducing WSBA membership to the inconsistency in pro bono reporting, and also how RPC 6.1 counts a myriad of work as pro bono hours3. October Legal Lunchbox – Basics for Lawyers on Nonprofit Boards4. The expansion and voting on having law students serve on the PBPSC	
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”?	

<p>The entity’s purpose increases the awareness of membership to pro bono opportunities and the need that Washington state low-income communities have for pro bono services. With our annual Pro Bono CLE event, we are attempting to reduce the hesitance that attorneys may have to volunteering for pro bono projects. With the article, we are attempting to highlight the lack of pro bono hours that are devoted in Washington state, to encourage our membership to think about how they can help community members access justice.</p>	
<p>2023-2024 Entity Accomplishments:</p>	
<p>Pro Bono CLE Fair October 2nd, 2024 – 3 CLE Credits</p>	
<p>September Bar News Article – Written by Gabe Hinman the Rules & Policy Subcommittee Chair – <i>What is Pro Bono Service and How Should the WSBA Monitor It?</i></p>	
<p>Legal Lunchbox October 29th, 2024 - Basics for Lawyers on Nonprofit Boards</p>	
<p>Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities: <i>SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.</i> <i>SMART Goals are: Specific, Measurable, Relevant and Time-Bound</i></p>	
1	Diversify the perspectives of the committee and increase the excitement from future lawyers by having law students serving as representatives on the committee. We can measure this goal through seeing how many applications we receive and how many total law students we have on the committee by the end of FY25.
2	Pass a change where pro bono reporting is mandatory, even if membership reports 0 hours. This will require BOG action since changing how we report would mean changing the language in RPC 6.1. This change would effectively make the reporting box something that people can’t skip.
3	Increase Pro Bono volunteering by creating community at local bar associations. We will accomplish this by hosting networking sessions or highlighting existent networking sessions across different local bar associations in Washington state. We hope to host some in Central Washington and Eastern Washington this year. It will be measured by the amount of volunteers that sign up to local bar associations and begin volunteering with them. Any increase would be considered a success.
<p>Looking Ahead: <i>Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.</i></p>	
1	Planning for the Pro Bono CLE Fair in FY26
2	If the passing of the RPC 6.1 language change does not happen this year, then we will look to proceed with it in FY26
3	Continuation of law school student involvement, and possibly adding a member of the public as a consultant.

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

How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?

We reach out to various stakeholders inclusive of the QLSPs and the ATJ board to inform our decision making. In addition, we are working this year to change our application process for the PBPSC to ensure that we are intentional in diversifying the perspectives of the membership in PBPSC. This is what we are aiming to accomplish in part by adding law students, and gaining their perspective on the profession.

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

I am grateful for the Pilot project with WSBACommunity. I am excited to use the document sharing function, and the new committee members are aiming to use it more often. We have a different BOG Liaison this year who was a past chair and member of PBPSC. Parvin is more involved, and we look forward to partnering with him to make our efforts come to fruition this year. None that I can think of at the moment.

Entity Detail & Demographics Report:
To Be Completed by WSBA Volunteer Engagement Advisor

Size of Entity:

(Include voting and non-voting members)

18

Number of Vacancies for FY25:

The number of positions with terms beginning October 1, 2024 (FY25)

6

Number of Applicants for FY25:

Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)

12

Budgeted Direct Expenses:

As of September 30, 2024.

\$2500

Indirect Expenses:

As of September 30, 2024.

\$56,609

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.

Disability	Yes	11%
	No	53%
	Chose Not to Respond	36%

District*	0	16%
	3	6%
	4	6%
	5	6%
	6	18%
	7N	12%
	8	12%
	9	6%
	10	18%
Ethnicity	Asian – South Asian	6%
	Black, African American or African Descent	12%
	Hispanic or Latinx	6%
	White or European Descent	53%
	Chose Not to Respond	23%
Gender	Female	35%
	Male	41%
	Non-Binary	6%
	Chose Not to Respond	18%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	18%
	Heterosexual	47%
	Demisexual	6%
	Chose Not to Respond	29%

The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

ⁱ 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.

WASHINGTON STATE B A R A S S O C I A T I O N

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Small Town and Rural Council
Chair or Co-Chairs:	Kari Petrasek
Staff Liaison:	Julianne Unite - WSBA Member Services and Engagement Manager
Board of Governors Liaison:	Matthew Dresden
Purpose of Entity:	
“....to strengthen and support the practice of law in the rural communities throughout Washington state.” – STAR Council Charter.	
Strategy to Fulfill Purpose:	
The STAR Council continued to execute their three-phase strategic plan adopted in May 2022 by the full STAR Council, expanding their deliverables for FY24.	
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”?	
The STAR Council directly supports the WSBA’s mission by helping address the issue of “legal deserts” in Washington, strengthens the quality of legal practice in underserved areas, and serves as a critical “force multiplier” for rural practitioners throughout Washington.	
2023-2024 Entity Accomplishments:	

Legal Lunchbox: Legal Issues Affecting Farm Workers & Agricultural Employees. Delivered July 30, 2024
Rural Practice Day: The council held their second rural practice networking event on November 8th, 2023. In this same week, the STAR Council resubmitted for the Rural Practice Month Proclamation from the Governor's Office. It was declared that November 13- December 11, 2023 would serve as Rural Practice Awareness Month.
Rural Practice Job Fair: In partnership with Gonzaga Law School the committee conducted their second rural practice job fair, in attempts to connect rural employees with qualified applicants who may not have otherwise known about rural opportunities. There were 17 employers who joined this year's virtual job fair, with approximately 60 job seekers. One employer shared that they intended to hire 2-3 interns as result of the job fair.
STAR Summit: The STAR Council hosted the Small Town and Rural Practice Inaugural Summit, in-person, at Gonzaga School of Law. The all-day seminar was approved for 6.0 CLE credits, which could include 6 Other credits or 4.75 Other and 1.25 Ethics-DEI, depending on choice of concurrent sessions. The Washington State Small Town and Rural Practice Summit convened a broad range of stakeholders, including judges, attorneys, and law school students from across Washington State, to discuss and learn about the challenges and opportunities facing rural communities and the legal professionals practicing within them. This first-of-its-kind event was thought-provoking and solution-driven as participants explored rural legal needs, resource allocation, access to justice issues, career fulfillment, and the opportunities and challenges associated with small town and rural law practice. Featuring US 9th Circuit Court of Appeals Judge Salvador Mendoza Jr., Washington State Supreme Court Chief Justice Steven C. González, Washington State Superior Court Judges, prosecutors, public defenders, public interest attorneys, private practitioners, and law school leaders, the event included keynote presentations, panel discussions, and breakout sessions. The summit had over 100 registrants and featured a very popular Welcome Reception the evening before the CLE. The STAR Council is currently in discussion of how to host this event again for FY25.
Initiated a Rural Practice Internship program which provides \$5,000.00 grants to law students who intern in rural law offices, government, or legal aid organizations. The committee awarded two scholarships in FY24 with the goal of expanding the program in FY25.
Brought a request for change to the STAR Committee charter to the Board of Governors. The change approved by the Board of Governors changed the STAR Committee to the STAR Council which allows the entity to add non-WSBA members to its ranks (this was particularly important for the law school representative slots).
Two STAR Council members (Merf Ehman and Kari Petrasek) and Advancement Department Director Kevin Plachy attended the National Center for State Courts (NCSC) Legal Deserts Summit in Las Vegas, NV. This national conference focused on the shortage of legal services in rural communities throughout the United States and best practices for addressing them.
Started development of a Rural Practice Day of Service program wherein WSBA will partner with a QLSP to provide a one-day legal clinic in rural communities. The council has budgeted to deliver two clinics in FY25.
The STAR Council continued to offer free job postings to qualified rural employers on the WSBA career center. There were 43 inquiries for job postings in FY24.

Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities:

SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.

SMART Goals are: Specific, Measurable, Relevant and Time-Bound

1	The STAR Council plans to deliver another Legal Lunchbox CLE
2	Host a statewide Summit in Eastern WA in Spring 2025, bringing stakeholders together to create goals on how to increase the number of lawyers in "legal deserts."
3	Will offer ten rural practice internships to law students over the summer (\$5,000.00 each).
4	Have requested the Governor's office to declare another rural practice month in November/December 2024.
5	Host another job fair targeted at rural communities in spring 2025.
6	Plan to deliver two, one-day Rural Practice Day of Service clinics within rural communities in FY25.

Looking Ahead: *Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.*

1	Continue to investigate other options to address legal deserts such as loan forgiveness, partnerships with the courts, and alternative pathways into the profession.
2	Work with state organizations to create policy regarding student loan forgiveness for lawyers who work in "legal deserts."
3	Ensure greater visibility for the STAR Committee in the statewide legal practice.

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

How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?

The council is focused on developing programs that narrow the access to justice gap in rural communities. The programs developed by the STAR committee integrate DEI principles. For instance, the Rural Practice internship Program was awarded to students who were serving groups that face economic, geographical, cultural, or language barriers to legal services. The STAR Council is discussing DEI issues in rural communities and looking for strategies to help address DEI issues within rural communities and how best to support legal professionals from marginalized groups in rural communities. For instance, the Rural Practice Summit this summer included a session on effectively addressing LGBTQIA, disability, immigration status, and racial bias. The STAR Committee actively seeks participation, input, and feedback from attorneys in traditionally under-represented areas of the state, including rural counties, Native American reservations, and areas outside the I-5 corridor. The STAR Committee comprises a mix of private and public attorneys and comprises predominately attorneys outside the greater Seattle area.

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

WSBA staff provide exemplary support for the WSBA STAR Committee. Julianne Unite, Kevin Plachy, and Chelle Gegax are all essential to the Committee's success to date.

Entity Detail & Demographics Report:
To Be Completed by WSBA Volunteer Engagement Advisor

Size of Entity:
(Include voting and non-voting members)

13

Number of Vacancies for FY25:
The number of positions with terms beginning October 1, 2024 (FY25)

8

Number of Applicants for FY25:
Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)

11

Budgeted Direct Expenses:
As of September 30, 2024.

\$5,000

Indirect Expenses:
As of September 30, 2024.

\$45,154

FY24 Demographics:

The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.

Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.

Disability	Yes	40%
	No	40%
	Chose Not to Respond	20%
District*	0	10%
	4	20%
	5	30%
	6	10%
	7N	10%
	8	10%
	9	10%
Ethnicity	Multi-Racial or Bi-Racial	10%
	White or European Descent	80%
	Chose Not to Respond	10%
Gender	Female	40%
	Male	40%
	Non-Binary	10%
	Chose Not to Respond	10%

Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	10%
	Heterosexual	70%
	Chose Not to Respond	20%

The Yes/No response for the Sexual Orientation category is data from a previous demographic question 'Do you open identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?' This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.

ⁱ 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.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boards¹), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Name of Entity:	Washington Young Lawyers Committee
Chair or Co-Chairs:	Aaron Haynes
Staff Liaison:	Chelle Gegax; Advancement Department Member Engagement Specialist
Board of Governors Liaison:	Jordan Couch
Purpose of Entity:	
The Washington Young Lawyers Committee (WYLC) derives its authority from the WSBA Bylaws, WSBA Board of Governors (BOG) Committees and Boards Policy, and WYLC Appointment Policy. Per Section XII.A of the WSBA Bylaws, the WYLC's purpose is to: 1) encourage the interest and participation of new and young lawyers and law students in the activities of the WSBA; 2) developing and conducting programs of interest and value to new and young lawyers consistent with the focus areas of public service and pro bono programs, transition to practice, and member outreach and leadership; 3) and upholding and supporting the Guiding Principles of the WSBA.	
Strategy to Fulfill Purpose:	
The WYLC chose to focus on four key points during FY24. 1. Outreach and communication; 2. Public Service and Leadership; 3. New Member Education and CLE Opportunities	

October 1, 2023 – September 30, 2024 (FY24)

<p>4. ABA YLD Representation</p> <p>The accomplishments goals outlined in this document reflect how the work of the WYLC addressed these priorities and fulfills the purpose of the WYLC.</p>	
<p>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"?</p>	
<p>1) As new and young lawyers come in, the WYLC helps those lawyers navigate through difficult issues and connect with the WSBA and its member services.2) We have a committee member involved in the Small Town and Rural Committee (STAR) and the Young Lawyer member. STAR works to bridge the gap between retiring practitioners and new lawyers to ensure consistent access to justice in rural communities.3) The WYLC encourages all new and young lawyers to participate in public service. The WYLC also gives our Public Service and Leadership Awards every year to recognize outstanding achievement.</p>	
<p>2023-2024 Entity Accomplishments:</p>	
<p>July After-Bar-Exam Social: 70+ attendees; partnered with KCBA and TPCBA</p>	
<p>ABA YLD Representation: The WYLC appointed former WYLC Chair, Emily Albrecht, as ABA delegate for the committee, and Mason Ji as the District Representative for Washington and Oregon to the ABA YLD, ensuring WYLC representation at the ABA conference.</p>	
<p>NME & CLE Opportunities: The WYLC successfully partnered with WSBA CLE to deliver a Legal Lunchbox CLE, a Financial Focus CLE and partnered with the MSE Team to deliver a MentorLink Mixer on Navigating a Courtroom.</p>	
<p>Public Service and Leadership: The Public Service and Leadership Award (PSLA) exists to connect and recognize new and young lawyers that demonstrate values of public service and leadership. In FY24, the WYLC received several nominations and awarded four New & Young Lawyers with the PSLA. A WYLC member drafted the article about the PSLA recipients for and upcoming Washington State Bar News issue and the committee agreed to restructure the display of this award and its recipients on the WSBA Website to look like the Apex Awards, ensuring the accomplishments of the recipients are easy to review.</p>	
<p>Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities:</p> <p><i>SMART Goals can be an effective framework for the creation of goal; they detail the work you and your team hope to accomplish and help to foster and communicate clear expectations.</i></p> <p><i>SMART Goals are: Specific, Measurable, Relevant and Time-Bound</i></p>	
1	Achieve quorum at meetings to advance key WYLC initiatives for the majority of meetings. Meetings are important for ensuring that WYLC initiatives and goals are met. They also amplify the WYLC's impact to get committee members involved and engaged.
2	Obtain Board of Governors' vote/approval on definition of "young lawyer." This is an initiative that the WYLC has spearheaded since 2023, and achieving its realization will be a milestone for the WYLC this fiscal year.
3	Collaborate with local bar associations to host regular CLE events. Collaboration between the WYLC and local bar associations is critical for engaging new and young lawyers. CLEs

	are a great way to engage new and young lawyers, and seeking avenues for collaboration can deepen the WYLC's impact and visibility.
Looking Ahead: <i>Please share any long-term goals and/or priorities your entity seeks to address, beyond the next fiscal year.</i>	
1	Increasing visibility and capture among new and young lawyers. Getting new and young lawyers to engage and participate with the WYLC in larger numbers is critical.
2	Increase collaboration with local and national bar associations. This includes county bar associations as well as the American Bar Association.
3	Achieve full membership year-to-year. Making sure that each region is represented and has a voice on the WYLC is critical for the committee's long-term success.
Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in decision-making? What techniques do you use to promote a culture of inclusion within the board or committee? How do you seek to elicit inclusive decision-making amongst your group? What more would you like to see done in this area to better support the needs of your entity?</i>	
<p>The WYLC took care to select members for the FY25 Committee who could provide unique perspectives that may not already exist on the committee currently. The WYLC also prioritized applicants with practice areas and experience that the committee does not already exist in the WYLC currently. The WYLC structures its meetings in a manner that ensures all members have an opportunity to share information and concerns during discussions.</p>	
Please share feedback regarding the support and engagement provided by WSBA.	
<p>WSBA support and engagement has been terrific, and the WYLC looks forward to the continued support and engagement provided by WSBA. Having such excellent support staff and services has always been a boon for the WYLC, and the WYLC wishes to continue tapping into these excellent resources this fiscal year to plan events and drive engagement.</p>	
Entity Detail & Demographics Report: <i>To Be Completed by WSBA Volunteer Engagement Advisor</i>	
Size of Entity: <i>(Include voting and non-voting members)</i>	18
Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25)</i>	7
Number of Applicants for FY25: <i>Applications were submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i>	15
Budgeted Direct Expenses: <i>As of September 30, 2024.</i>	\$13,500

Indirect Expenses: <i>As of September 30, 2024.</i>		\$52,600
<p>FY24 Demographics:</p> <p>The WSBA promotes diversity, equality, and cultural competence in the courts, legal profession, and the bar, and is committed to ensuring that its committees, boards, and panels reflect the diversity of its membership.</p> <p>Aside from the factors marked (*), demographic information was provided voluntarily and individuals had the option to not respond to any or all of the factors below.</p>		
Disability	No	59%
	Yes	18%
	Chose Not to Respond	23%
District*	0	16%
	1	12%
	2	6%
	3	18%
	4	12%
	5	6%
	6	12%
	7N	12%
	7S	12%
	10	6%
Ethnicity	Asian – East Asian	6%
	Asian – South Asian	6%
	Hispanic, Latinx	6%
	White, European Descent	59%
	Chose Not to Respond	23%
Gender	Female	47%
	Male	35%
	Chose Not to Respond	18%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	12%
	Heterosexual	47%
	Chose Not to Respond	41%
<p>The Yes/No response for the Sexual Orientation category is data from a previous demographic question ‘Do you openly identify as a sexual minority to include the following: gay, lesbian, bisexual, transgender?’ This question was on the volunteer application when some of the current members submitted their application and therefore, is still included.</p>		

ⁱ 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.