

WASHINGTON STATE BAR ASSOCIATION



WSBA-CLE Models & Sections Round Table Discussion

January 26, 2018 | 9:30 am - 12:30 pm

WSBA Conference Center 1325 4th Avenue, Suite 600, Seattle & Webcast
Conference Call Option: 1.866.577.9294, participant code 5016532

9:30 a.m.	Welcome & Introductions	Kevin Plachy, <i>Education Programs Manager</i>
9:45	Overall Goals & Meeting Goals	Terra Nevitt, <i>Director of Advancement & Chief Development Officer</i>
10:00	Questions: Starting from a Common Understanding	Kevin Plachy Paris Eriksen, <i>Sections Program Manager</i>
10:15	What We have Learned: Data & Section Leader Feedback	Kevin Plachy
10:45	Overview: Concept Proposal	Terra Nevitt Kevin Plachy
11:00	Break	
11:15	Round Table Discussion & Next Steps	Paris Eriksen, <i>moderating</i>
12:30	Adjourn	

Your commitment as a section leader is valued and appreciated – thank you for being here today!

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WSBA-CLE & Sections Discussion To-Date

- October 26, 2017 – WSBA-CLE & Sections Kick-Off Discussion
 - Overview of WSBA-CLE portfolio
 - Develop a shared understanding of WSBA-CLE market trends
 - Review and discuss WSBA-CLE costs and revenues
 - Share all relevant information to promote an informed discussion
 - Open communication about collaboration between WSBA-CLE and Sections
- Nov. 3, 2017 – Email: Meeting Summary and Individual Section CLE Data
- Section Leader Feedback Survey
- Section Executive Committee Discussions & Meeting Attendance w\ Kevin Plachy
 - Administrative Law
 - Alternative Dispute Resolution
 - Business Law
 - Cannabis Law
 - Civil Rights Law
 - Construction Law
 - Corporate Counsel
 - Creditor Debtor Rights
 - Criminal Law
 - Elder Law
 - Environmental & Land Use Law
 - Family Law
 - Health Law
 - Intellectual Property
 - International Practice
 - Juvenile Law
 - Labor & Employment Law
 - Litigation
 - Real Property, Probate & Trust
 - Senior Lawyers
 - Solo & Small Practice
 - Taxation
- January 26, 2018: WSBA-CLE & Sections Round-Table Discussion

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WSBA-CLE Portfolio

- 9.9 total FTEs (including allocations for staff from outside of CLE)
- Section CLEs
 - *Half, full, and multi-day seminars.*
- WSBA Presents
- Self-sustaining cost center

What We Have Learned

Market Trends: FY16 v. FY17

- 35% decrease in live (in-person & webcast) attendance
- 41% decrease in live registration revenue
- 51% decrease in overall section-splits
- 14% increase product sales

FY17 v. FY18 so far...

- On-Demand Seminars sales for the first quarter of FY18 are 26% higher than 1st quarter sales in FY17.

Section Splits: FY16 v. FY17

- In FY16 split to sections totaled \$154,670.00 compared to \$89,581.00 in FY17

Feedback Survey

- 8 participants
- Delivery of relevant, timely information to members was most important factor in developing continue legal education
- Half of the respondents answered maybe when asked if the new approach would mitigate market trends

Executive Committee Discussions, Sections:

- Have different priorities in developing continuing legal education
- Had questions around decision making
- Are interested in revenue splits to include live and on demand seminar income
- Are impacted differently

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Overview: Possible New Approach

Goals:

- Simplicity
- Captures actual costs
- Shared accountability
- Mutual benefit to all Sections

New Approach:

- Share net revenue after all costs are incurred
- Tiered Split:
 - 50\50% net revenue (up to \$8,000 total net revenue)
 - Split 35% Section\65% WSBA net revenue to Sections (after \$8,000 total net revenue)

Some Items of Note:

- Per FY18 Projections, 14 section seminars with excess revenue over \$8,000
- Per FY18 Projections, 10 section seminars with excess revenue under \$8,000
- WSBA-CLE seminar delivery channels: in-person, webcast, On-Demand
 - Trend is moving to On-Demand
- Recorded products on the WSBA Store for appx. 3 years (2 year, 9 months sales cycle)
- Sections would share revenue for the lifespan of the product
- Excess net revenue would be disbursed annually
- Multi-day midyears would be recorded and converted to product
- Mini-CLE model is not changed by this proposal
- Any individual net program loss will be incurred by WSBA-CLE split
- Total Projected Net Revenue to WSBA CLE under current model for FY18 is projected to be \$162,804.00. The projected Net Revenue to WSBA-CLE under the proposed model would be \$96,892.00
- FY18 split to sections are projected to be \$57,070.00 under the current model and FY18 splits under the proposed model would be \$100,573.00

Next Steps:

- WSBA staff will develop and share draft revisions to the WSBA Fiscal Policy in early February
- WSBA Budget & Audit Committee* to review on February 15
- BOG Discussion*: propose first reading on March 8.
- BOG Discussion*: propose action on May 17-18.
- If approved, WSBA will work with each Section to budget for FY19

**opportunity for input*

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FY18 WSBA CLE BUDGETED REVENUE/EXPENSES

REVENUE:

LIVE SEMINAR REVENUE:	\$894,235.00
ON DEMAND SEMINAR REVENUE:	\$968,000.00
TOTAL REVENUE:	<u>\$1,862,235.00</u>

EXPENSES:

DIRECT LIVE SEMINAR EXPENSES:	\$523,337.00
DIRECT ON DEMAND SEMINAR EXP:	\$54,245.00
INDIRECT LIVE SEMINAR EXPENSE:	\$945,235.00
INDIRECT ON DEMAND SEMINAR EXP:	\$176,614.00
TOTAL EXPENSES:	<u>\$1,699,431.00</u>
PROJECTED NET REVENUE:	<u>\$162,804.00</u>

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STAFF ALLOCATIONS LIVE SEMINARS:	8.41 FTE
STAFF ALLOCATIONS ON DEMAND SEM:	1.53 FTE
TOTAL WSBA CLE STAFF ALLOCATIONS:	9.94 FTE

PORTFOLIO INCLUDES:

LIVE SEMINAR CREDITS HOURS:	400 (187 SECTION/213 WSBA)
ON DEMAND SEMINAR CREDIT HOURS:	345 (167 SECTION/178 WSBA)