

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

Board of Governors Meeting
Late Meeting Materials

January 13-14, 2023
WSBA Conference Center
Seattle, WA
Zoom and Teleconference

BOARD OF GOVERNORS MEETING Late Materials January 13-14, 2023 WSBA Conference Center, Seattle, WA Zoom and Teleconference	
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JANUARY 8, 2023

PRESIDENT'S REPORT & REPORT ON LONG RANGE STRATEGIC PLANNING COUNCIL:

The following is meant to be a brief update on regarding the Board of Governors and Long Range Planning Council's activities. Overall as we are roughly 1/3 done with the FY 23 BOG year, we are heading in a positive direction as far as carrying out WSBA's mission.

Increasing WSBA Volunteers & Making the Volunteer Experience More Enjoyable:

One of the priorities I've tried to make this year, and I wanted to thank President-Elect Hunter Abell for also helping me carry out is to encourage WSBA volunteers to volunteer with our bar association. Volunteers are truly a major important component that allows WSBA to be able to do all of its current programs and services that it offers in carrying out our mission statement.

As part of that, I am continuing to work with the Executive Director and WSBA Executive Leadership team to try to come up with additional ways to improve the volunteer experience for WSBA volunteers. If you have any ideas or suggestions on how to improve the overall volunteer experience, please do not hesitate to let myself or Executive Director Terra Nevitt know.

BOG meeting feedback and evaluations:

In wanting to solicit good faith feedback from participants to look to continue to try to improve and make BOG meetings more enjoyable for the Board, I've decided to implement the return of BOG meeting evaluations. These will be sent to Governors and the Executive Leadership Team after meetings in FY 23. Executive Director Terra Nevitt and I, along with the BOG Executive Committee will review the feedback in a good faith attempt to try to continue what the majority thinks works well, and to tweak things that may not.

Part of this process, at the request of some Executive Committee members, we are also going to have a space at the end of the January BOG meeting on Saturday for Governors to comment thoughts as to the January meeting that they wish to make. It is my sincere hope that this will continue to improve our BOG meetings.

FY 23: Retreat Format Changes:

In working collaboratively with Executive Director Terra Nevitt, and the BOG Officers, in trying to make strategic improvements to the operational planning and overall WSBA and BOG operations for our organization, we have decided to create a new schedule of future BOG retreats, and planning retreats which are intended to try to create better governance for the organization.

At the November 2022 BOG meeting, we spent a day meeting with Mr. John Phelps, the former Executive Director of Arizona. Overall, the feedback was very positive regarding the training, and the vast majority of those in attendance (both Governors and WSBA staff) found that the retreat was a success. To continue this the following is the current plan for the rest of FY 23 and calendar year 2023:

- At the March BOG meeting on Friday, March 3rd we will be conducting an FY 24 BOG financial planning retreat. This is intended to allow the BOG to provide input on any major activities that it may have planned for FY 24. This is intended to help the Executive Director, Executive Leadership Team, and the Treasurer and B & A Committee to draft the FY 24 WSBA Budget.
- In June, at the BOG meeting, we will have the normal FY 24 BOG retreat, which will be planned by President-Elect Abell.
- In November, I believe President-Elect Abell plans to hold another team building retreat similar to what we did in FY 23.

It is our collective hope that doing this will help to improve relationships, and the collaborative process.

December 12, 2022 BOG Executive Committee:

The BOG Executive Committee met on December 12, 2022 to set forward the January BOG meeting. The committee reviewed the survey results from the November BOG meeting and discussed implementation of best practices from the November BOG meeting retreat that was facilitated by Mr. John Phelps.

The Committee agreed with the President and Executive Director that moving the Governor Round Table discussion to the front of the meeting and making a more robust use of the Consent Agenda for various items would help improve the flow of the BOG.

GR 9 Amendment Co-Sponsorship:

The Board of Governors in September voted to co-sponsor amendments to GR 9. The BOG agreed to serve as a co-sponsor with the Superior Court Judges Association (SCJA) and the District and Municipal Court Judges Association, (DMCMA). The BOG affirmed its co-sponsorship but didn't approve co-sponsoring the cover sheet information on the submission. Ultimately the Supreme Court rejected this submission.

Bar News Revenue Cost Neutral:

I would like to give special thanks to Sara Niegowski and the Communications Department for accepting the challenge of making WSBA Desk books and the Bar News publications revenue cost neutral. When I started as Treasurer in FY 2020, both were cost centers that historically had always ran fairly significant deficits that were

ultimately subsidized by the WSBA unrestricted fund, and WSBA license fee revenue. WSBA staff ultimately heard the message of previous BOG's desires to make these revenue cost neutral, and I really appreciate the hard work by Sara N and her team.

President's Reception: The 2023 WSBA President's reception will honor 2023 WSBA Apex Winners and we will be providing them their crystal awards, and showing their videos during the presentation. We are also going to be swearing in the FY 24 President, and FY 24 New Board of Governors at this event. The intent of this is to try to do a better job of honoring award winners and making the most efficient use of WSBA funds while avoiding an expensive sit down dinner event that family and friends of the Apex Winners can't afford to go to due to costs. Stay tuned for further information as the date and venue are selected and finalized later in 2023.

FY 22 Net Unrestricted Fund Profits:

The following is a true and correct table representing WSBA's financial performance v. budget from FY 2018 through FY 2022:

Fiscal Year	Budgeted Loss or Gain	Actual/*Estimated Net Increase	Overall Increase Actual v. Budgeted	Unrestricted General Fund Reserves	Reserve Notes
FY 2018	(-\$732,275)	\$432,107	\$1,164,382	\$1,845,858	
FY 2019	(-\$101,616)	\$940,679	\$1,042,295	\$2,686,537	\$100,000 of unrestricted net income allocated to Facilities Reserve
FY 2020	(-\$591,915)	\$791,697	\$1,383,612	\$3,478,234	
FY 2021	(-\$202,779)	\$1,543,940	\$1,746,719	\$4,522,174	\$500,000 of unrestricted net income allocated to Facilities Reserve
FY 2022	(-\$89,563)	\$1,641,094	\$1,730,657	\$5,713,268	\$500,000 of unrestricted net income allocated to Operating Reserve, \$50,000 of Facilities Reserve allocated back to Unrestricted General Fund Reserves
FY 2023	(-\$561,000)				

The total fund balance gain for FY 22 was roughly 1.64 million dollars in net revenue over expenditures. This is including additional WSBA staff that were onboarded in FY 22, as well as robust salary enhancements to most WSBA staff as a result of a salary survey that WSBA conducted. I would like to thank past Treasurer Bryn Peterson and the members of the FY 22 Budget and Audit committee for their hard work, as well as WSBA staff for this great financial performance!

Overall these figures are something for all of us to be very proud of. They have helped to place this Board in a great position to be able to have sufficient funds to hopefully carry on the previous BOG's commitment not to raise member license fees through 2026, but at the same time have sufficient funds to fund new programs, and to continue to provide robust salary and benefits to our staff.

As we move forward for FY 23 where we continue to have record inflation, and want to open up and return to more and more in person events, we likely will not see such positive financial performance as we did in FY 22 and previous fiscal years.

MBA/ATJ Board/DEI Council Breakfast Event:

In wanting to continue WSBA and the Board of Governors commitment to DEI work, and with the good faith intent of improving relationships, trust, and collaboration between the Board of Governors and various Minority Bar Associations, the Access to Justice Board, DEI Council and other stakeholders and DEI allies, I've worked with Executive Director Nevitt to set up a breakfast on Friday, January 13, 2023 with the MBA's and the BOG.

March In-Person BOG Meeting with Supreme Court:

We are currently planning to have the annual Board of Governors meeting with the Washington State Supreme Court to be an in-person meeting with the Court for the first time since 2019! (Covid-19 permitting). Due to Covid-19, the BOG has had to hold it's FY 20, FY 21, and FY 22 annual meetings with the Court exclusively via the zoom virtual meeting platform. The current meeting with the Court is planned for March 3, 2023.

Long Range Planning Council:

\$1.7. Million Recommendation to WSBA Facility Fund:

The Council is discussing a recommendation to the Board of Governors regarding the future space of WSBA and what to do with the existing lease at WSBA's current location. The committee met and approved recommending that 1.7 million of the current unrestricted fund balance be moved by the Board of Governors from the unrestricted fund balance fund to the facility reserve fund. The overwhelming majority of the committee felt this would be in the best interest of WSBA as it would then help to earmark approximately 2.7 million dollars of current funding which may be able to be used to place as a down payment on a building in King County, or to outright purchase a building without a mortgage in the Spokane area.

The Council's next meeting is set for Monday, January 23, at 3:30 pm.

Legal Link Recommendation:

The Council also is recommending that the BOG approve establishment of the Legal Link service which the Council approved recommendation of at a previous council

meeting. Both of these items will be on the January Board of Governors Agenda for discussion and potential action by the BOG.

Conclusion:

I am excited for the January 2023 BOG meeting. The BOG will be hopefully finalizing its' FY 23 Board Priorities, we will receive a leadership and decision-making training for the first time in the six years I've been on the Board. It is my hope that we continue to have a great FY 23 BOG year, and that we continue to improve trust, relationships and making serving on the BOG more enjoyable. I want to thank every Governor for their commitment to serve on the Board of Governors. It is an honor to serve as your FY 23 WSBA President.

Respectfully,

Daniel D. Clark

FY 23 WSBA President

Access to Justice Board*Provided by WSBA Staff**Dated December 15, 2022***FY22 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%
	Yes	0%
	Chose Not to Respond	10%
District*	5	10%
	6	10%
	7N	10%
	7S	10%
	9	30%
	Unknown	30%
Ethnicity	Asian – East Asian	20%
	Asian – Southeast Asian	20%
	Black, African American, or African Descent	10%
	White or European Descent	40%
	Multi Racial or Biracial	10%
	Hispanic or Latino/a or Latinx	10%
	Chose Not to Respond	0%
Gender	Female	50%
	Male	40%
	Chose Not to Respond	10%
Sexual Orientation	Heterosexual	40%
	No	10%
	Gay, Lesbian, Bisexual, Pansexual or Queer	30%
	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.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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 or Co-Chairs:	Bruce Turcott, Chair; Cathy Helman, Vice Chair
Staff Liaison: <i>(include name, job title, and department if known)</i>	Ramana Pendyala, Admissions Manager
Board of Governors Liaison:	Matthew Dresden
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
<p>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.</p> <p>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).</p>	
Strategy to Fulfill Purpose:	
<p>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). Grading has been remote for the past two years (except for March 2022) but occurred in Seattle when it was in person. 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. Currently the Board members are reviewing</p>	

the WLC materials. 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.

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 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.

2021 -2022 Entity Accomplishments:

BOBE members graded the winter 2022 exam in person at the WSBA office and summer 2022 bar exam remotely. Grading was completed accurately and on time for both exams. BOBE leadership solicited feedback from examiners on grading software and remote vs. in-person grading. A few graders were happy grading remotely as they thought it saved them time. One grader thought that an increase in stipend may attract new graders. Two of our newly appointed graders have graded exams in other jurisdictions in the past. The graders past experience in a different jurisdiction is an added asset to the Board. In June of this year, the BOBE added 3 new members to the group and has recommended 2 more members to be nominated to the committee.

Looking Ahead: 2022-2023 Top Goals & Priorities:

- | | |
|----------|---|
| 1 | Recruit 10-15 bar examiners and conduct training for new graders and provide refresher training for all graders |
| 2 | Continue to improve online grading software features for graders |
| 3 | In-person grading for winter and summer 2023 exams |
| 4 | Review and update the Washington Law Component as necessary |
| 5 | Assign graders to grade the winter and summer bar exams in 2023 |

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?

WSBA DEI team conducted training to all the examiners (returning and new). Increasing the diversity of graders is a top goal and priority for the Board in 2022-2023.

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.*

(1) The BOG Liaison and Staff Liaison have been working on recruitment efforts along with the Chair and Vice Chair. APR 2(a)(1) requires that only active members of WSBA be appointed to the Board. We are requesting a rule change to allow attorneys with judicial status to join BOBE. The current Vice Chair was on judicial status and had to return to active status to remain on the Board. It has been a challenge to recruit active attorney members to the Board. (2) The BOBE would appreciate any assistance WSBA can give with recruitment of new members, especially diverse members, to join BOBE and serve as graders. (3) The current stipend, unchanged since the UBE was adopted, should be increased to assist with recruitment and retention of members.

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

Size of Entity:	50 max.
Number of Applicants for FY23: <i>(October 1, 2022 – September 30, 2023)</i>	15
Number of current volunteer vacancies for this entity:	10 (desired)
Direct Expenses*:	\$23,000
Indirect Expenses:	9,948

**Does not include stipends for work performed by committee members for the bar exam.*

FY22 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%
	Yes	11%
	Chose Not to Respond	3%
District*	0	4%
	1	4%
	2	4%
	4	4%
	5	20%
	6	14%
	7N	14%
	7S	11%
	8	7%
	9	4%
	10	14%
Ethnicity	Asian – Southeast Asian	7%
	White or European Descent	86%

	Hispanic or Latino/a or Latinx	4%
	Chose Not to Respond	3%
Gender	Female	43%
	Male	54%
	Chose Not to Respond	3%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	11%
	Heterosexual	71%
	No	4%
	Chose Not to Respond	4%

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

FY 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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:	Character and Fitness Board (CFB)
Chair or Co-Chairs:	Michael A. Morguess
Staff Liaison: <i>(include name, job title, and department if known)</i>	Lisa Amatangel, Associate Director, OGC
Board of Governors Liaison:	Bryn Peterson
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
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 decision on all 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 Court. The CFB meets as frequently as necessary, generally meeting one day a month for hearings. 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.

2021 -2022 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 to all scheduled hearings (two in this fiscal year). Goal 2: Learn and recognize the additional functions provided by the new online application system when that system is functional, in order to understand how that affects an applicant’s ability to provide accurate and up-to-date information in their applications. Accomplishment: The CFB received training on the new online application system. Goal 3: Provide diversity training at the first CFB meeting, for consideration and reference when conducting all hearings during the year. Accomplishment: This was successfully completed during the first CFB meeting.

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	Continue to conduct hearings as necessary, completing all written findings and recommendations in a timely fashion.
2	Continue to conduct hearings as necessary, completing all written findings and recommendations in a timely fashion.
3	Continue recruiting efforts to fill open positions.
4	Assess/manage a return to in-person/hybrid hearings.
5	Click or tap here to enter text.

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

How have you elicited input from a variety of perspectives in your decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive, and eventually lead the profession? Other?

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.

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.*

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 coordinators and staff is necessary for recruitment

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

Size of Entity:	13
Number of Applicants for FY23 <i>(October 1, 2021 – September 30, 2022)</i>	9
Number of current volunteer vacancies for this entity:	2
Direct Expenses:	\$10,000
Indirect Expenses:	\$136,858

FY22 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	80%
	Yes	10%
	Chose Not to Respond	10%
District*	1	10%
	2	10%
	4	10%
	5	10%
	6	10%
	7S	10%
	10	10%
	Ethnicity	Asian – East Asian
White or European Descent		90%
Gender	Female	50%
	Male	50%

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

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 2022: October 1, 2021 – September 30, 2022

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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:	Carrie Umland
Staff Liaison: <i>(include name, job title, and department if known)</i>	Nicole Gustine, Assistant General Counsel, OGC Brenda Jackson, Client Protection Fund Analyst, OGC
Board of Governors Liaison:	Carla Higginson
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
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 analyst 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”?	

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.

2021 -2022 Entity Accomplishments:

Educating WSBA members about the CP Board. 2) Increasing public awareness of the CP Board. 3) Continuing to operate a fiscally responsible fund. 4) Continuing to work to decide difficult claims.

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	Continue to educate WSBA members about the Client Protection Board.
2	Increase public awareness of the Client Protection Board and uses of the fund.
3	Continue to operate a fiscally responsible fund.
4	Continue to work to decide difficult claims.
5	Attract applicants from a diverse array of lawyer and public members for positions on the CP Board.

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?

1. The CP Board is not using specific tools; however it is cognizant of diversity and prioritizes it.
2. The CP Board actively recruits members from different backgrounds and areas of the state. It includes members who work in government, solo practice and in larger firms, as well as two community members.
3. The CP Board respects the voice and vote of each member. Each application is discussed extensively before a vote is taken. The CP Board consists of eleven lawyers and two community members. It currently has a diverse membership.

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.*

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 Staff**

Size of Entity:	13: 11 lawyers, 2 public members
Number of Applicants for FY23 <i>(October 1, 2022 – September 30, 2023)</i>	6
Number of current volunteer vacancies for this entity:	2
Direct Expenses:	\$1,500
Indirect Expenses:	\$155,750

FY22 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*	2	9%
	6	9%
	7S	18%
	8	9%
	9	27%
	Unknown	28%
Ethnicity	Black, African American or African Descent	9%
	Hispanic or Latino/a or Latinx	9%
	White or European Descent	55%
	Multi Racial or Bi Racial	18%
	Chose Not to Respond	9%
Gender	Female	55%
	Male	36%
	Chose Not to Respond	9%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	18%
	Heterosexual	55%
	Chose Not to Respond	73%

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 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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:	Pamela H. Anderson
Staff Liaison: <i>(include name, job title, and department if known)</i>	Jeanne Marie Clavere, Senior Professional Responsibility Counsel; Sandra Schilling, Professional Responsibility Counsel
Board of Governors Liaison:	Brett Purtzer
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
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 (RPC) as applied to a wide variety of practice areas. The CPE also prepares recommendations for amendments to the RPC and reports to the WSBA Board of Governors when requested regarding stakeholder proposed RPC and GR amendments submitted to the Supreme Court.	
Strategy to Fulfill Purpose:	
The CPE promulgates advisory opinions and reviews, drafts, and edits amendments to the RPC for submission to the Board of Governors. The work of the CPE is done primarily by subcommittees who research and develop drafts in on specific topics. The advisory opinions are provided to the Board of Governors (BOG) for information and posted on the WSBA Advisory Opinions database for the benefit of the membership. The CPE provides reports and recommendations regarding the RPC to the BOG 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"?	

Lawyers practicing ethically enhance the public image of our noble profession resulting in increased public trust. Understanding clearly articulated advisory opinions and rules of professional conduct empower the lawyer to deal competently, confidently, and honestly with peers and the public. Through its analysis and recommendations, the CPE assists the BOG in making proposals for rule amendments that promote access to justice for underserved communities withing Washington State.

2021 -2022 Entity Accomplishments:

Review of suggested amendments brought by the Identifying Biased or Non-Inclusive Language in Court Rules Project and also amendments suggested by QLaw with comment periods that ended on April 30, 2022; promulgation and publication of an advisory opinion regarding the issue of Reply All email responses to opposing counsel with opposing party included; promulgation and publication of an advisory opinion regarding new RPC 1.4(c) Washington’s mandatory insurance disclosure requirement; submission to the BOG and approval for submission to the WSSC regarding amendments to RPC 1.8(e) financial aid exception for indigent clients due to the impact of the COVID 19 pandemic – the proposed amendments will be published with a comment period to the end of April, 2023; research, outreach and recommendation to the BOG regarding work with the LFW for their presentation of a proposed amended rule regarding RPC 1.15A Lawyer’s unidentified trust account funds;

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	Continue work on an advisory opinion regarding remote work by Washington lawyers and multi-jurisdictional issues.
2	Continue work on possible proposed amendments regarding lawyer referral services and fee sharing (RPC 7.2 now 7.3, 1.5(e) and 5.4.
3	Continue work on an advisory opinion from a request by legal aid organizations regarding requests by funding agencies for data on clients. The CPE is conducting an extensive outreach to stakeholders.
4	Continue work on an advisory opinion similar to ABA Formal Opinion 500 when an attorney is challenged to effectively communicate and represent their client because of language barriers.
5	Continue to receive and consider requests for advisory opinions from bar members. Handle and respond to requests from the BOG, the Executive Director, and other entities requesting review and analysis of proposed RPC amendments.

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 actively seeks input from interested stakeholders and bar members on proposed rule changes or draft opinions. Five out of nine members are women and two come from diverse backgrounds. Each member brings a unique and valuable perspective to the discussions and work of the committee through practice area and years of experience, professional positions and geographic diversity. Through its advisory opinions and analysis 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.

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 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 as needed, and bring forward broad ethics topics and issues that are trending with the membership to the committee’s attention for possible advisory opinions. Both PRCs provide administrative support to the CPE. The BOG liaison did not attend committee meetings during the last fiscal year; however, he is available to assist the committee with BOG matters.

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

Size of Entity:	9
Number of Applicants for FY23: <i>(October 1, 2022 – September 30, 2023)</i>	9
Number of current volunteer vacancies for this entity:	0
Direct Expenses:	\$3,723
Indirect Expenses:	\$52,746

FY22 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*	1	11%
	6	11%
	7N	22%
	7S	22%
	10	22%
	Unknown	12%
Ethnicity	Asian – Central Asian	11%
	Asian – East Asian	11%
	White or European Descent	78%
Gender	Female	56%

	Male	44%
Sexual Orientation	Heterosexual	78%
	Chose Not to Respond	22%

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

FY 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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:	Council on Public Defense
Chair or Co-Chairs:	Travis Stearns, Chair; Jason Schwarz, Vice-Chair
Staff Liaison: <i>(include name, job title, and department if known)</i>	Bonnie Sterken, Equity and Justice Specialist, EJD
Board of Governors Liaison:	Brett Purtzer
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
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.

2021 -2022 Entity Accomplishments:

Supported the Office of Public Defense’s budget request; Submitted comments to proposed new GR 41 and amendments to CR 39 regarding virtual proceedings; The Standards Committee continued to make progress on evaluating open caseload limits and the definition of fully supported caseloads; Published three statements to help defenders talk to their funders about their workload situation and how it can be addressed; Held a training on bias, stereotyping and microaggressions; Sponsored viewing of Who We Are and panel discussion

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	Implement the work plan developed by the Race Equity Committee, which includes increase diversity, equity and inclusion with the CPD and addressing race equity in public defense services.
2	Propose updates to the Standards for Indigent Defense regarding open caseload limits and the definition of fully supported caseloads.
3	Support efforts to secure adequate levels of public defense funding, in collaboration with the Office of Public Defense.
4	Provide education around the implementation of the new GR 42 Independence of Public Defense Services that will become effective January 1, 2023.
5	Launch a new Conflict Counsel Committee to evaluation and make recommendations regarding conflict counsel pay structures.

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 CPD launched a Race Equity Committee which has been charged with addressing internal DEI issues and race equity statewide in public defense. The Committee has reviewed the CPD’s recruitment practices and other guiding documents for areas that need to be revised. The overall diversity of the CPD has been intentionally growing and we will continue to work on ensuring that the meetings are inclusive. The Race Equity Committee also facilitated a training recently on bias, stereotypes, microaggression, and their impacts on legal systems. Over the next year the Race Equity Committee plans to learn more about the experiences of BIPOC and marginalized folks working in public defense and learn how to better support them. In September the CPD partnered with the WSBA DEI Council to sponsor a viewing of the film “Who We Are: A Chronicle of Racism in America” followed by a panel discussion.

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 Council is lucky to have Bonnie Sterken. The Council and its numerous committees meet frequently, and Bonnie is great at communicating with and coordinating meetings, agendas, minutes, and schedules. The Council can thank a lot of our success on Bonnie’s knowledge of WSBA procedures and deadlines along with her insights into BOG practices. Bonnie has been helpful in recruiting and selecting a more inclusive list of new CPD members. The Council recently requested the equivalent of an additional .5 FTE as we address how the national indigent defense standards should be implemented through court rule in Washington, which we are doing at the request of the Court. This additional staff support would be applied to developing a public education and community outreach program, with a thoughtful media strategy, as well as substantive support throughout the drafting process. We look forward to collaborating with the Communications Department and Office of General Counsel on this staffing request. The Council appreciates the BOG’s continued support of our work to build on our standards work and produce real change for public defense providers and their clients.

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

Size of Entity:	23 voting members and up to 5 emeritus members
Number of Applicants for FY23 <i>(October 1, 2022 – September 30, 2023)</i>	13
Number of current volunteer vacancies for this entity:	0
Direct Expenses:	\$6,000
Indirect Expenses:	\$16,436

FY22 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	42%
	Chose Not to Respond	58%
District*	1	5%
	2	5%
	3	10%
	4	10%
	5	10%
	6	5%
	7N	16%
	7S	16%
	9	10%
	10	5%

	Unknown	8%
Ethnicity	American Indian	5%
	Asian – South Asian	5%
	Asian – Southeast Asian	5%
	Black, African American, or African Descent	10%
	White or European Descent	26%
	Middle Eastern Descent	5%
	Chose Not to Respond	44%
Gender	Female	10%
	Male	37%
	Chose Not to Respond	63%
Sexual Orientation	Heterosexual	42%
	Chose Not to Respond	58%

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

FY 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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:	CLE Committee
Chair or Co-Chairs:	Sharon Glenn
Staff Liaison: <i>(include name, job title, and department if known)</i>	Shanthi Raghu, Education Programs Manager, Advancement Department
Board of Governors Liaison:	Serena Sayani
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
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.	

2021 -2022 Entity Accomplishments:	
Developed several new programs for the WSBA CLE including The Future of Finance, and Contracts	
Looking Ahead: 2022-2023 Top Goals & Priorities:	
1	identify new areas of programming for WSBA presents CLE programs
2	identify new speakers and chairs
3	recruit additional Committee Members
4	Click or tap here to enter text.
5	Click or tap here to enter text.
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>	
The CLE Committee itself is comprised of several members from diverse backgrounds. This year, intentional effort was made to recruit new Committee members from local and county bars, as well as MBAs. The CLE Committee encourages WSBA CLE staff to engage with a wide range of stakeholders in program development. 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.	
Please share feedback regarding the support and engagement provided by WSBA. <i>For example:</i>	
<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> 	
The WSBA CLE Staff is often invited to attend CLE Committee meetings. This year, Chair Sharon Glenn met with the Board of Governors at their September 2022 meeting to report and share some of the accomplishments and challenges of this past year.	
Entity Detail & Demographics Report: <i>To Be Completed by WSBA Staff</i>	
Size of Entity:	18
Number of Applicants for FY23: <i>(October 1, 2022 – September 30, 2023)</i>	3
Number of current volunteer vacancies for this entity:	12

Direct Expenses:	\$150	
Indirect Expenses:	\$12,075	
FY22 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*	3	17%
	6	17%
	7N	33%
	7S	17%
Ethnicity	White or European Descent	83%
	Multi Racial or Bi Racial	17%
Gender	Female	50%
	Male	50%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	17%
	Heterosexual	67%
	Chose Not to Respond	16%

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 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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:	Court Rules and Procedures Committee
Chair:	Paul Crisalli
Staff Liaison: <i>(include name, job title, and department if known)</i>	Nicole Gustine, Assistant General Counsel Kyla Jones, Paralegal II, OGC
Board of Governors Liaison:	Lauren Boyd
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
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.	

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.

2021 -2022 Entity Accomplishments:

The committee continues to carefully vet new proposals. In 2021-2022 the Committee reviewed the Criminal Rules for Superior Courts (CrR) and the Criminal Rules for Courts of Limited Jurisdiction (CrRLJ).

Looking Ahead: 2022-2023 Top Goals & Priorities:

- | | |
|---|---|
| 1 | According to the schedule for review, the Evidence Rules and Infraction Rules for Courts of Limited Jurisdiction will be reviewed in 2022-2023. |
| 2 | Click or tap here to enter text. |
| 3 | Click or tap here to enter text. |
| 4 | Click or tap here to enter text. |
| 5 | Click or tap here to enter text. |

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

How have you elicited input from a variety of perspectives in your decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive, and eventually lead the profession? Other?

1. The Committee is cognizant of diversity in selecting its members. It is an important factor in recruitment and consideration of applicants.
2. 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.
3. During the application period, the current Chair reached out to the leadership of several specialty and minority bar associations to encourage their membership to apply to be on the Committee.
4. The Committee is composed of members with a wide range of backgrounds, experiences, and identities.
6. The current 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.

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.

Over the past year, 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 Staff**

Size of Entity:	28
Number of Applicants for FY23 <i>(October 1, 2022 – September 30, 2023)</i>	8
Number of current volunteer vacancies for this entity:	9
Direct Expenses:	\$100
Indirect Expenses:	\$5,652

FY22 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	85%
	Chose Not to Respond	15%
District*	0	10%
	1	10%
	3	10%
	5	10%
	7N	16%
	7S	16%
	8	21%
	9	5%
	Unknown	2%
Ethnicity	Asian – East Asian	5%
	White or European Descent	79%
	Middle Eastern Descent	5%
	Multi Racial or Bi Racial	5%
	Other: Asian	5%
	Chose Not to Respond	1%
Gender	Female	32%

	Male	63%
	Chose Not to Respond	5%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	5%
	Heterosexual	74%
	No	5%
	Chose Not to Respond	16%

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 [GR12.3](#), 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 2022: October 1, 2021 – September 30, 2022

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.

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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:	Editorial Advisory Committee
Chair or Co-Chairs:	Drew Pollom
Staff Liaison: <i>(include name, job title, and department if known)</i>	Kirsten Abel, Bar News editor, Communications
Board of Governors Liaison:	Sunitha Anjilvel
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
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.	
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 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.	

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 the integrity of the legal profession, and to champion justice”?

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.

2021 -2022 Entity Accomplishments:

The EAC helped to develop two significant themed issues during the 2021-22 year—one on the topic of family law and one on the topic of law practice transitions, both of which included content written by multiple authors recruited by EAC members. Also in development, with the help of EAC members, is an issue planned for November 2022 on topics important to legal professionals who practice in rural parts of Washington. Other important articles either written or developed by EAC members this year include “Want a Successful Mentoring Relationship? Focus on Building Trust”; “What the Uniform Electronic Wills Act Changes About Wills in Washington”; and several Beyond the Bar Number features and Minority Bar Association Spotlights. During a past presentation by the EAC to the Board of Governors, a Board member stated that they would personally like to see more practical and/or technical content in Bar News. This sentiment was also shared by some EAC members, and the committee has worked to develop more content of practical interest to readers. The last three issues of Bar News contain higher percentages of practical/technical content than any other three consecutive issues (50%, 50%, and 60%). The EAC also continued its collaboration with the Diversity Committee (now the DEI Council), a relationship that resulted in several significant articles this year including “A Look at the Racial Justice Consortium: Examination and transformation for Washington state courts”; “Mentor, Educator, Trailblazer: An interview with Justice G. Helen Whitener”; “Gender, Justice, and the Power of Data: The Washington Supreme Court Gender and Justice Commission’s latest report”; and “Carl Maxey: Boxer, Lawyer, Civil Rights Champion.” Another important accomplishment was the finalizing and implementation of an equity lens for Bar News. We worked with WSBA Equity and Justice Lead Imani Shannon to craft a best practices sheet that addresses ways in which we can ensure the articles we select and publish are equitable and inclusive and consider all relevant perspectives. Lastly, the EAC reviewed each issue of the magazine over the past year and influenced a few key design and publication changes—namely, a redesign of the NWSidebar teasers in Bar News and the move to print “In Remembrance” names in every issue rather than in every three issues.

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	Work to create at least two more themed issues over the next year.
2	Continue to increase reader interest and engagement/response with timely, relevant, practical, and provocative articles.
3	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.
4	Continue to work to include voices from diverse backgrounds and areas of practice, with a variety of views and perspectives.
5	Continue to establish relationships with new authors from all parts of the state.

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?

As discussed briefly above, the EAC continued to work with the Diversity Committee (now DEI Council) on a number of issues this year. Those include: to develop regular content for the magazine on DEI-related topics, to invite DEI Council members to attend any and all EAC meetings, to develop an equity lens for the magazine that will help the EAC and WSBA staff evaluate submissions and make the magazine a more equitable space, and to develop content specifically for the February 2022 Black History Month issue. In the past year, all of those goals were met. We were able to develop content on a number of DEI-related topics (including a regular DEI Resource of the Month feature), implement a best practices/equity lens for the magazine, and create an excellent Black History Month issue for February 2022. In addition, there is diversity in background, years in practice, areas of practice, and perspectives among the EAC members who weigh in on story ideas and unsolicited submissions. 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 six-month editorial calendar every month and provides feedback and suggestions. Lastly, the EAC staff liaison also serves as the staff liaison to the Equity & Disparity Work Group, and as liaison to the GR 12.2 Subcommittee, which works on issues that are very important to the EAC and to the magazine.

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 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 attends some monthly committee meetings and has contributed to the magazine as an author (March 2020 and July/August 2022). In addition, the WSBA Equity and Justice team attends some EAC meetings and contributes to the magazine in many ways. The EAC chair also presents semi-regularly on the committee to the Board of Governors and the Board’s Executive Committee.

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

Size of Entity:	14
Number of Applicants for FY23 <i>(October 1, 2022 – September 30, 2023)</i>	7
Number of current volunteer vacancies for this entity:	5
Direct Expenses:	\$0
Indirect Expenses:	\$11,183

FY22 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	11%
	Chose Not to Respond	11%
District*	0	11%
	1	11%
	4	11%
	7N	33%
	8	11%
	9	11%
	10	11%
	Ethnicity	American Indian
White or European Descent		89%
Gender	Female	44%
	Male	44%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	11%
	Heterosexual	78%
	Chose Not to Respond	11%

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 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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:	Justice MaryI. Yu
Staff Liaison: <i>(include name, job title, and department if known)</i>	Darlene Neumann, Paralegal III, Office of General Counsel
Board of Governors Liaison:	Tom McBride
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
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; and The DART has no independent decision-making authority or regulatory authority. DART is in compliance with GR 12.3.	
Strategy to Fulfill Purpose:	
When issues concerning the discipline system are identified, the DART will meet on an ad hoc basis with key players of the discipline system, WSBA executive leadership, and others to provide comment. The DART may make recommendations for change to the discipline system rules or procedures as appropriate.	
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 DART's purpose is focused on the discipline system, which is integral to maintaining the integrity of the legal profession. The work of DART supports the GR 12.1 Regulatory Objectives requiring legal professionals to be regulated in the public interest and the policy of a well-regulated profession that can effectively serve the public and members of the Bar and champion justice, as well as the GR 12.2(a)(7) purpose to administer discipline of WSBA members in a manner that protects the public and respects the rights of the member.

2021 -2022 Entity Accomplishments:

In March 2022, at the request of the Court, the DART met to discuss the public comments to the proposed RDI that specifically addressed the disciplinary system as a whole and provide recommendations to the Court. The DART heard several perspectives regarding the timing of significant changes to the disciplinary system and concerns about the handling of disability proceedings, which led to the recommendation of a task force to study the issue further, and several ideas for providing informal assistance to prose respondents.

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	DART discussed the potential inconsistency between ELC 5.7 and the Court's internal rule regarding the dismissal of grievances (complaints).
2	DART will consider expanding its membership in the charter to include, for example, an additional lawyer not involved in the discipline system, members from the minority bars, and those with prior experience in the discipline system to broaden the perspective on the round table.
3	DART will continue to meet as needed to address issues or concerns about the discipline system raised by the Court or its members or others.
4	Click or tap here to enter text.
5	Click or tap here to enter text.

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

How have you elicited input from a variety of perspectives in your decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive, and eventually lead the profession? Other?

The DART charter specifies the member positions to those who hold key roles in the discipline system, a neutral lawyer (no involvement with discipline system), the executive leadership of the Bar, a board of governor, and public members. DART members who represent respondents in the discipline system (respondents counsel) and the MBA representative will elicit input from their members to bring back to DART.

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 WSBA staff liaison has provided administrative support to the chair and members and performed tasks as directed by the chair. Meetings were conducted via Zoom and proved adequate. The DART utilizes Box for sharing and collaborating on materials. The Board of Governor member did not attend any meetings this fiscal year but has been copied on all meeting communications and materials.

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

Size of Entity:	16
Number of Applicants for FY23 <i>(October 1, 2021 – September 30, 2022)</i>	2
Number of current volunteer vacancies for this entity:	4
Direct Expenses:	\$0
Indirect Expenses:	\$5,936

FY22 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	50%
	Yes	33%
	Chose Not to Respond	17%
District*	7N	17%
	7S	67%
	Unknown	16%
Ethnicity	White or European Descent	67%
	Hispanic – Latino/a or Latinx	17%
	Chose Not to Respond	16%
Gender	Female	67%
	Male	17%
	Chose Not to Respond	16%
Sexual Orientation	Heterosexual	83%
	Chose Not to Respond	17%

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 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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:	V. Paige Pratter, Chair Christopher Sanders, Vice Chair
Staff Liaison: <i>(include name, job title, and department if known)</i>	Nicole Gustine, Assistant General Counsel
Board of Governors Liaison:	Not applicable
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
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.

2021 -2022 Entity Accomplishments:

In 2021, the review committees of the Disciplinary Board met 15 times to consider 242 matters. They issued 189 dismissals, ordered 35 matters to hearing, ordered investigation in 10 matters, issued one advisory letter, and decided 7 other non-routine matters, such as orders on deferrals, costs, etc. In 2021, the full Disciplinary Board considered 14 disciplinary and disability matters and ordered the transfer of five lawyers to disability inactive status. The full board reviewed and issued orders on 14 stipulations and heard oral argument in one reinstatement from disbarment review. Per court rule, they considered whether to order or deny sua sponte review in three cases involving a recommendation of suspension or disbarment.

Looking Ahead: 2022-2023 Top Goals & Priorities:

- | | |
|---|--|
| 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. |
|---|--|

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 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 the 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.

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.*

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 Staff**

Size of Entity:	14: 10 lawyers, 4 public members
Number of Applicants for FY23 <i>(October 1, 2022 – September 30, 2023)</i>	17
Number of current volunteer vacancies for this entity:	0
Direct Expenses:	\$4,118
Indirect Expenses:	\$129,371

FY22 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	87%
	Yes	13%
District*	0	7%
	1	7%
	4	13%
	7N	13%
	7S	27%
	10	7%
	Unknown	26%
Ethnicity	Asian – East Asian	7%
	Asian – South Asian	7%
	Black, African American or African Descent	7%
	White or European Descent	67%
	Chose Not to Respond	12%
Gender	Female	47%
	Male	53%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	7%
	Heterosexual	87%
	Chose Not to Respond	6%

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 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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:	Diversity Committee/DEI Council
Chair or Co-Chairs:	Nam Nguyen, Co-Chair; Gov. Sunitha Anjilvel, Co-Chair
Staff Liaison: <i>(include name, job title, and department if known)</i>	Imani Shannon, Equity & Justice Lead, Equity and Justice Department; Diana Singleton, Chief Equity & Justice Officer
Board of Governors Liaison:	Committee does not have a BOG liaison, but does have 4 BOG members, one of whom is the committee co-chair
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
<p>The Washington State Bar Association’s Diversity Committee become the Diversity, Equity and Inclusion (DEI) Council midway through the year. For more information on why the Committee became the Council, read this Bar News article (https://wabarnews.org/2022/10/12/wsba-diversity-committee-transitions-to-diversity-equity-and-inclusion-council/). The purpose of the committee and council are largely the same: to advance DEI in the legal profession and the legal system. The DEI Council’s new charter provides more specificity and clarity to the entity’s purpose: “To advance diversity, equity and inclusion and address the problems of bias, systemic inequities and underrepresentation in the legal profession, the Council’s work includes but is not limited to: Increasing and supporting members from underrepresented communities by developing and supporting diversity pipeline and mentorship programs and partnering with schools, students and members from underrepresented communities; Developing diversity, equity and inclusion educational content and programs for members, volunteers and members of the public; Developing diversity, equity and inclusion educational content and programs designed to offer members opportunities to learn, gain skills and fulfill the MCLE ethics requirement on the mitigation of bias; Implementing and updating the WSBA Diversity and Inclusion Plan; Supporting and collaborating with the Minority Bar Associations to promote mutual goals to advance diversity, equity and inclusion in</p>	

the legal profession; Promoting leadership opportunities in the WSBA, legal profession and legal system by engaging in outreach to underrepresented members and the public, promoting diversity in the judiciary, and recommending candidates for At-Large Governors on the WSBA Board of Governors (BOG); and Advising the BOG on examining issues through a diversity, equity and inclusion lens and fulfilling its responsibilities outlined in General Rule 12.2(a)(6), WSBA Strategic Goals, the Race and Equity Justice Initiatives commitments, and approved resolutions concerning diversity, equity and inclusion.

Strategy to Fulfill Purpose:

The Council works with a variety of Bar and community members to ensure it centers underrepresented members and communities, and also works collaboratively with WSBA staff from the Equity and Justice team.

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’s purpose of advancing DEI in the legal profession and legal system serves the public by working toward a more diverse profession who represents and looks like the public. The Council’s purpose also serves the public by building DEI competency among our members so they can better serve the public especially those from underserved and marginalized communities. By serving the public in this way, it ensures the integrity of the legal profession. The Council’s purpose furthers the mission of serving the members not only by helping to build their DEI competency but also by working to advance inclusion in the profession so that all members including those who are underrepresented feel like they belong and can enter and thrive in the profession. The Council’s work to advance DEI, especially equity, in the profession and the legal system ultimately works towards “championing justice.”

2021-2022 Entity Accomplishments:

1. **Create a Seat at the Table for Law Students:** In FY21, the then-Diversity Committee invited law school staff and students to come to their meetings to share about their DEI work and discuss how they could collaborate. Following those conversations, the then-Diversity Committee decided to create an ongoing opportunity for law students to be involved with the committee; they created law student representative positions on the committee so the committee could have law student engagement and perspectives from each law school. After law students from each of the three WA law schools applied and interviewed, the then-committee selected two law students from each law school. Over this past year, committee members volunteered to be paired with the law student representatives to mentor them.
2. **Change from Committee to Council to Promote Diversity and Equity:** In an effort to make the membership of the then-committee more inclusive, the committee submitted a proposal to the Board of Governors to become a council. By becoming a council, it now allows the committee’s membership to broaden beyond active bar members and voting membership to broaden beyond Board of Governor members. Now, the council’s membership can include not only active and BOG members but also pro bono status members, judicial officers, law school staff, faculty and students and the public.
3. **Support and Work in Solidarity with Minority Bar Associations (MBAs):** The council continued to work in solidarity with MBAs over this last year, specifically supporting their work to create and deliver a proposal to the BOG concerning ways that the BOG can hold itself accountable to its DEI commitments.

4. **Policy Analysis and Outreach to Promote Diversity on Board of Governors:** The committee/council has been working to evaluate the current definition of “diversity” in the WSBA Bylaws as it relates to the At-Large seat on the BOG. The committee/council has researched how the ABA and other bar associations define “diversity” and has been seeking feedback from members of the legal community including MBA members, section leaders and the Gender and Justice Commission. The committee/council will continue to seek feedback from the legal community including the Minority and Justice Commission and submit a proposal to the BOG for a new definition in 2023.
5. **Paving Way for a New DEI Plan:** The committee/council determined that it is time to create a new DEI Plan to replace the 2013 Diversity and Inclusion Plan. They created a small workgroup to begin visioning what the process will involve and the planning process to begin this fiscal year.
6. **Launching the Membership Demographic Study:** The committee/council began working with WSBA staff and other community members to create and send out a Request for Proposals for the 10-year membership demographic study (the 2013 Diversity and Inclusion Plan committed the Bar to do a membership demographic study every 10 years). Many consultants submitted proposals and the membership demographic study workgroup conducted interviews of a handful of consultants. The consult, Know-Why, was ultimately selected and has begun the process of seeking feedback the survey design.
7. **Hosted Annual ARCEvent:** In partnership with Seattle University School of Law’s Access Admissions Program, the committee/council hosted a virtual reception and networking event for incoming underrepresented students from Seattle University School of Law. The event featured a keynote speaker and three networking breakout sessions.
8. **Designed and Delivered DEI Education:** The committee/council collaborated with members of different MBAs and others in the legal community to develop three Legal Lunchbox CLEs devoted to DEI topics.
9. **Co-Sponsored DEI Film Screenings:** The committee/council co-sponsored two virtual film-screening events, “Crime on the Bayou,” and “Who We Are: A Chronicle of Racism in America” which offered members free access to the film and a moderated panel of people who were featured in the films.
10. **Partnered with the Editorial Advisory Committee and Bar News staff to promote diversity, equity, and inclusion in the Bar News:** The committee/council continued to partner with WSBA staff to write DEI-related articles and recruiting Bar members to write articles, with an equity focused lens from the beginning of the process.

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	Complete and finalize the comprehensive membership demographics study.
2	Continue to deepen the relationships with the WA law schools and collaborate on mutual DEI goals for diversifying and making the profession more inclusive.
3	Partner with MBAs to operationalize regular DEI trainings for the BOG, identify ways for BOG members to informally hold themselves accountable to the DEI values, and create infrastructure so that BOG applicants will need to demonstrate their commitment to DEI.
4	Finalize the outreach and feedback phase of evaluating the definition of “diversity” and submit a proposed new definition to the BOG in 2023.

5	Work in partnership with WSBA staff to increase participation and leadership of historically and currently marginalized groups in WSBA volunteers, committees, and boards.
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6	Begin the process for evaluating the current Diversity and Inclusion plan and drafting a new plan.
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Please report 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?

- 1. DEI Education for the DEI Council:** The committee/council acknowledges that they continue to learn about DEI and are committed to learning together. This past year, Imani Shannon, an Equity and Justice Lead, gave a training to the committee/council on gender inclusion.
- 2. Strategic Approach to DEI Council Recruitment:** The committee/council created a survey for members to take so we can identify present social identities, skills and experience represented. By creating a baseline on the perspectives and skills/experience offered, the committee/council hopes to engage in more targeted recruitment efforts.
- 3. Mentorship of Law Student Representatives:** As mentioned above, the committee/council mentored underrepresented students in a variety of ways: through our own student representatives, through the Joint Minority Mentorship Program, and the Seattle University School of Law’s ARC reception.

Please describe the relationship with WSBA staff and the Board of Governors.

For example:

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

There are 4 BOG members on the Committee, who are voting members and not just a liaison. WSBA staff also support the co-chairs in writing memos to the BOG and bringing issues before the BOG.

Entity Detail & Demographics Report:

To Be Completed by WSBA Staff

Size of Entity:	14 (+ 4 BOG Members)
Number of Applicants for FY23 <i>(October 1, 2022 – September 30, 2023)</i>	10
Current volunteer position vacancies:	3
Direct Expenses:	\$24,000
Indirect Expenses:	\$73,289

FY22 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	53%
	Yes	27%
	Chose Not to Respond/Unknown	20%
District*	0	7%
	1	7%
	2	7%
	3	7%
	7N	13%
	7S	20%
	9	13%
	10	7%
Ethnicity	Asian – East Asian	13%
	Asian – Southeast Asian	13%
	Black, African American or African Descent	13%
	Hispanic, Latino/a or Latinx	7%
	White or European Descent	53%
	Multi Racial or Bi Racial	47%
	Other: Japanese American	7%
	Other: Jewish	7%
Gender	Female	53%
	Male	20%
	Non Binary	7%
	Chose Not to Respond/Unknown	20%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	33%
	Heterosexual	40%
	Chose Not to Respond	27%

ⁱ The Access to Justice Board (not regulatory, but applicable to the distinction herein) and Regulatory Boards (Disciplinary Board, LLLT Board, Limited Practice Board, MCLE Board and Practice of Law Board) are not required by Bylaws or Court Rule submit an annual report to WSBA. However, as part of the administration of monitoring of Regulatory Boards, the Boards listed herein typically provide an annual report to the Court and WSBA should be provided this same report an annual basis.

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2022: October 1, 2021 – September 30, 2022

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.

Name of Entity:	Judicial Recommendation Committee
Chair or Co-Chairs:	Michiko Fjeld, Chair
Staff Liaison: <i>(include name, job title, and department if known)</i>	Sanjay Walvekar, Legislative Affairs Manager, COMM
Board of Governors Liaisons:	Alec Stephens & Francis Adewale
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
<p>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.”</p>	
Strategy to Fulfill Purpose:	
<p>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.</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>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.</p>	
2021-2022 Entity Accomplishments:	
<p>The JRC held four meetings in which it evaluated nineteen 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.</p>	

Looking Ahead: 2022-2023 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.
3	Click or tap here to enter text.
4	Click or tap here to enter text.
5	Click or tap here to enter text.
<p>Please report 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></p>	
<p>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.</p>	
<p>Please describe the relationship with WSBA staff and the Board of Governors. <i>For example:</i></p> <ul style="list-style-type: none"> • <i>Quality of WSBA staff support/services</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 JRC guidelines require a BOG liaison to attend each JRC meeting and JRC recommendations are considered by the BOG periodically throughout the year.</p>	
<p>Entity Detail & Demographics Report: <i>To Be Completed by WSBA Staff</i></p>	
Size of Entity:	22
Number of Applicants for FY23: <i>(October 1, 2022 – September 30, 2023)</i>	11
How many current volunteer position vacancies for this entity?	0
Direct Expenses:	\$4,500
Indirect Expenses:	\$26,273
FY22 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%
	Yes	5%
	Chose Not to Respond	5%
District*	2	5%
	5	14%
	6	19%
	7N	38%
	7S	9%
	9	5%
Ethnicity	Black, African American or African Descent	9%
	Latino/a or Latinx	5%
	White or European Descent	86%
	Multi Racial or Bi Racial	5%
Gender	Female	29%
	Male	67%
	Chose Not to Respond	4%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	9%
	Heterosexual	67%
	No	5%
	Chose Not to Respond	19%

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.

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 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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 Mowrey
Staff Liaison: <i>(include name, job title, and department if known)</i>	Katherine Skinner, Law Clerk Program Lead, RSD
Board of Governors Liaison:	Dan Clark
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
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 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.

2021 -2022 Entity Accomplishments:

APR 6 Rules and Regulations: The LCB submitted the APR 6 suggested amendments to the Supreme Court. The Supreme Court approved the amendments effective September 1, 2022.
 MCLE tutor credit: The LCB worked with the MCLE Board to finalize language for the suggested amendment to APR 11 for Law Clerk Program tutors to receive MCLE credit.

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	The LCB, in collaboration with staff, will continue the conversation on reaching out to states to discuss reciprocity for those that completed the Law Clerk Program
2	Strategize expanding outreach efforts to promote a diverse Board
3	Continue conversations in strategizing reaching out to rural counties in the state to increase access to justice
4	Discuss and strategize outreach to increase the public’s knowledge of the program
5	Update program policies and forms as needed and continue to look for opportunities to create new forms for an easier flow of communication between program participants, the LCB and the WSBA.

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 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 in order to bring a variety of perspectives to the Program.

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.*

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 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 Staff

Size of Entity:	11
Number of Applicants for FY23 <i>(October 1, 2021 – September 30, 2022)</i>	4
Number of current volunteer vacancies for this entity:	0
Direct Expenses:	\$4,667
Indirect Expenses:	\$63,891

FY22 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*	1	9%
	2	9%
	3	18%
	4	9%
	5	36%
	7N	9%
	7S	9%
	Ethnicity	American Indian
White or European Descent		82%
Chose Not to Respond		9%
Gender	Female	45%
	Male	45%
	Chose Not to Respond	10%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	27%
	Heterosexual	45%
	No	9%
	Chose Not to Respond	19%

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

FY 2022: October 1, 2021 – September 30, 2022

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.

Name of Entity:	Legislative Review Committee
Chair or Co-Chairs:	Brian Considine, Chair
Staff Liaison: <i>(include name, job title, and department if known)</i>	Sanjay Walvekar, Legislative Affairs Manager, COMM
Board of Governors Liaison:	Kyle Sciuchetti
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
<p>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.</p>	
Strategy to Fulfill Purpose:	
<p>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.</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>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.</p>	
2021-2022 Entity Accomplishments:	
<p>The Committee received and reviewed a significant legislative proposal and forwarded this proposal to be reviewed by the BOG for WSBA request legislation. The Committee vetted the proposal and determined that it fulfilled GR 12.2 requirements. The Committee conducted a thorough analysis of relevant issues and discussed details with representatives of the Business Law Section’s Corporate Act Revision Committee (CARC). Then, the Committee voted to recommend sponsorship of CARC’s</p>	

legislative proposal and this recommendation was approved by the BOG. The bill reached final passage and was signed into law by the Governor during the 2022 legislative session.

Looking Ahead: 2022-2023 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.
2	Click or tap here to enter text.
3	Click or tap here to enter text.
4	Click or tap here to enter text.
5	Click or tap here to enter text.

Please report 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?

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 describe the relationship with WSBA staff and the Board of Governors.

For example:

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

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:
To Be Completed by WSBA Staff**

Size of Entity:	35 max.
Number of Applicants for FY23 <i>(October 1, 2022 – September 30, 2023)</i>	15

How many current volunteer position vacancies for this entity?	0	
Direct Expenses:	\$2,800	
Indirect Expenses:	\$36,782	
FY22 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	61%
	Yes	8%
	Chose Not to Respond	31%
District*	2	15%
	3	15%
	4	8%
	7N	15%
	8	15%
	9	8%
	10	23%
Ethnicity	Asian – East Asian	15%
	White or European Descent	69%
	Chose Not to Respond	16%
Gender	Female	38%
	Male	46%
	Chose Not to Respond	16%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	8%
	Heterosexual	61%
	Chose Not to Respond	31%

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 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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 or Co-Chairs:	FY22 Chair: Nancy Ivarinen, Vice Chair: Jen Bull; FY23 Chair: Stephen Crossland, Vice Chair: Nancy Ivarinen
Staff Liaison: <i>(include name, job title, and department if known)</i>	Jonathan Burke, Innovative Licensing Counsel, RSD
Board of Governors Liaison:	FY22: Lauren Boyd; FY23: Lauren Boyd
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
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 Program, perform the responsibilities provided in APR 28(C)(2), and to advise or prescribe the conditions of and limitations upon the provision of certain legal services provided by LLLTs to protect the public.	
Strategy to Fulfill Purpose:	
The LLLT Board will continue to effectuate its ongoing duties regarding license requirements, including proposing appropriate rule changes, addressing LLLT disciplinary issues, developing forms for LLLT use, and developing CLEs relevant to LLLT practice as well as attorneys.	
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"?	

LLTs provide needed legal services in the practice area of domestic relations primarily to the working poor and people of moderate means and, in addition, provide pro bono services. The LLLT program provides access to justice to those who otherwise may not be able to afford it.

2021 -2022 Entity Accomplishments:

The LLLT Board created the final two LLLT examinations for the LLLT Program prior to the July 31, 2022 sunset date. It dealt with and encouraged applicants in the pipeline to complete the application process. The LLLT Board proposed an amendment to extend the deadline for those applicants who passed the LLLT exam to complete the application until July 31, 2023, which was adopted by the Supreme Court on June 9, 2022. The LLLT Board prepared an extensive and comprehensive draft Real Estate Division Worksheet for LLLTs to use. The LLLT Board continues to review and assess APR 28 as the LLLT Program transitions to its post-sunset role. The LLLT Board submitted proposed amendments to APR 28, which are currently pending consideration by the Supreme Court. Attached to this report is a copy of a Arkansas Law Review discussing Washington’s LLLT Program, published in January 2022.

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	Propose appropriate and necessary amendments to APR 28.
2	Continue to develop and update forms for LLLTs, including finalizing the real estate worksheet and a request for notice form.
3	Develop CLEs to support LLLTs dealing with various legal topics and issues, including the anticipated changes to APR 28 relating to third party guardianships and protective orders.
4	Develop a means to gather and analyze data about LLLT services being provided to evaluate the LLLT Program.
5	Continue to collaborate with the Practice of Law Board and Access to Justice Board regarding other programs involving limited legal service providers.

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 LLLT Board attempted to recruit more Board members from outside the Seattle/Tacoma area, obtain a more gender balanced Board membership and effectuate the inclusion of people who have protected class status. The LLLT Board recruited members in its efforts to seek more economic diversity, and worked toward welcoming practitioners with different levels of legal experience.

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.*

Towards the beginning of FY 2022, the LLLT Board had some concerns related to issues being discussed by the TAXICAB taskforce (Task Force Team Administering Xenial Involvement). TAXICAB sought to define WSBA policies to comply with the responsibilities in denoted in General Rule (GR) 12.3. The WSBA endeavored to reach a consensus with Supreme Court Boards, including the LLLT Board, regarding the interpretation of GR 12.3. The LLLT Board's concerns included the applicability of immunity and indemnity to conduct by members of the LLLT Board. The LLLT Board's concerns substantially subsided after the TAXICAB taskforce reached a proposed agreement of understanding entitled Joint Administrative Policy Between WSBA and the Supreme Court Boards (Agreement), which includes provisions on indemnity and immunity and addresses other issues.

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

Size of Entity:	15 members
Membership Size:	76 active LLLTs (8 inactive)
Number of Applicants for FY23 <i>(October 1, 2021 – September 30, 2022)</i>	22
Number of current volunteer vacancies for this entity	0
Direct Expenses:	\$15,449
Indirect Expenses:	\$71,889

FY22 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	7%
	Chose Not to Respond	20%
District*	2	7%
	3	7%
	4	7%
	5	7%
	7S	7%
	8	7%
	Unknown	58%
Ethnicity	Black, African American or African Descent	7%
	White or European Descent	87%
	Chose Not to Respond	6%
Gender	Female	73%
	Male	20%

	Chose Not to Respond	7%
Sexual Orientation	Heterosexual	80%
	Chose Not to Respond	10%

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 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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 or Co-Chairs:	FY22 Chair: David Bastian; FY23 Chair: Bill Ronhaar
Staff Liaison: <i>(include name, job title, and department if known)</i>	Jon Burke, Innovative Licensing Counsel, RSD
Board of Governors Liaison:	Carla Higginson
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
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 Bar and others to create and grade a LPO examinations for admission to practice law, improve and approve standard forms for use by LPOs, and handle grievances and enforce discipline under the applicable ethics rules and procedural rules.	
Strategy to Fulfill Purpose:	
The LPB meets four to six times per year to develop and grade the LPO exam and discuss issues and items of concern or that are relevant to the LPO license. The LPB’s Disciplinary Committee handles the resolution of many ethics grievances. The Forms Committee reviews, edits, and creates standard forms used by LPOs that are submitted to the LPB for approval.	
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 and effectuating the LPO Program, including (1) working with the Bar to prepare, administer, and grade the LPO exam 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.

2022 -2023 Entity Accomplishments:

The LPB prepared and graded two LPO examinations comprised of 50 multiple choice questions, 3 essay questions, and 1 performance questions that were administered in February 2022 and July 2022. The LPB worked to administer two in-person LPO examinations this year and started working with a vendor to use computer software for the July 2022 LPO examination. The LPB drafted and added the Appointment of Successor Trustee to the LPO forms.

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	Continue to develop testing software for future LPO examinations
2	Review and make changes to LPO forms, as needed
3	Review, edit, and improve bank of LPO examination questions to ensure content and format appropriately assess the required knowledge and skills to practice as a limited practice officer.
4	Consider changes to LPO Form for Statutory Warranty Deed
5	Click or tap here to enter text.

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

How have you elicited input from a variety of perspectives in your decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive, and eventually lead the profession? Other?

The LPB encourages diversity, equity, and inclusion in its efforts to recruit board members. These efforts have not yet yielded the positive results that the LPB intended. For example, the last recruitment effort by the LPB did not yield enough applications to fill all of the required positions on the LPB, and the only person to apply for a position on the LPB did not represent a minority or protected class. In the future, LPB will make a stronger effort to encourage more diversity.

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 LPB has a positive symbiotic relationship with WSBA staff and the BOG liaison. The former BOG liaison is now a member of the LPB.

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

Size of Entity:

9

Number of Applicants for FY23 <i>(October 1, 2021 – September 30, 2022)</i>	4																													
Number of current volunteer vacancies for this entity	0																													
Direct Expenses:	\$2,000																													
Indirect Expenses:	\$52,267																													
<p>FY22 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 rowspan="2">Disability</td> <td>No</td> <td>89%</td> </tr> <tr> <td>Chose Not to Respond</td> <td>11%</td> </tr> <tr> <td rowspan="3">District*</td> <td>1</td> <td>22%</td> </tr> <tr> <td>2</td> <td>11%</td> </tr> <tr> <td>7S</td> <td>11%</td> </tr> <tr> <td rowspan="2">Ethnicity</td> <td>White or European Descent</td> <td>89%</td> </tr> <tr> <td>Chose Not to Respond</td> <td>11%</td> </tr> <tr> <td rowspan="3">Gender</td> <td>Female</td> <td>44%</td> </tr> <tr> <td>Male</td> <td>44%</td> </tr> <tr> <td>Chose Not to Respond</td> <td>11%</td> </tr> <tr> <td rowspan="2">Sexual Orientation</td> <td>Heterosexual</td> <td>67%</td> </tr> <tr> <td>Chose Not to Respond</td> <td>33%</td> </tr> </table>		Disability	No	89%	Chose Not to Respond	11%	District*	1	22%	2	11%	7S	11%	Ethnicity	White or European Descent	89%	Chose Not to Respond	11%	Gender	Female	44%	Male	44%	Chose Not to Respond	11%	Sexual Orientation	Heterosexual	67%	Chose Not to Respond	33%
Disability	No		89%																											
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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.

To: Washington Supreme Court Justices
From: MCLE Board
Date: August 29, 2022
RE: **2021-2022 MCLE BOARD TERM 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 adjust 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.

FY 2021-2022 MCLE Board Goals:

1. MCLE Credit for Law Clerk Tutors

Pursuant to APR 11(d)(2)(i), “The MCLE Board shall review and suggest amendments or make regulations to APR 11 as necessary to fulfill the purpose of MCLE and for the timely and efficient administration of these rules and for clarification of education requirements, approved activities, and approved course subjects. Suggested amendments are subject to review by the Board of Governors and approval by the Supreme Court.” Taking into consideration feedback from the public, licensed legal professionals, and with the support of both the Law Clerk Board and the unanimous support of the WSBA Board of Governors at their July 2022 meeting, the MCLE Board decided at their August 5, 2022 meeting to recommend to the Washington Supreme Court an amendment to APR 11 which would allow MCLE credit for tutors in the APR 6 Law Clerk Program.

The MCLE Board plans to submit a GR 9 cover sheet by October 15, 2022, for the Supreme Court to consider.

2. Explore an amendment to the APR 11 ethics requirement—in the topics of both mental health and technology

The MCLE Board formed a workgroup to explore whether to suggest additional amendments to the APR 11 ethics requirement- in the topics of both mental health and technology. This workgroup was delayed in meeting due to the limitations of staff resources during this unprecedented reporting period (the Court ordered extension of the 2018-2021 reporting period resulted in two times the number of



licensed legal professionals reporting during this MCLE Board term), as staff were unable to support the MCLE Board with two preliminary suggested amendments simultaneously. MCLE Board may revisit this topic to see if they would like to explore this in October 2022.

3. Course Audits

MCLE Board members have a goal of auditing two or more CLE courses each year, focusing on accredited sponsors as well as courses covering topics of diversity, equity and inclusion. The MCLE Board has completed five (5) audit reports throughout the 2021-2022 term and are in the process of auditing four (4) additional courses. Accredited sponsors have the same duties as general sponsors, however they have the additional responsibility of approving their own courses and determining appropriate MCLE credit in accordance with APR 11. Accredited sponsors pay an annual flat fee for all course applications submitted in lieu of an application fee for each individual course.

4. Diversity

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 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 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.

WSBA Task Force Team Administering Xenial Involvement with Court Appointed Boards

MCLE Board member Robert Malae serves as the MCLE Board representative on the WSBA Task Force Administering Xenial Involvement with Court Appointed Boards (TAXICAB) and provides regular updates to the MCLE Board regarding the actions of the task force at each MCLE Board meeting. The Task Force charter lists the team's responsibilities as:

1. Assessing the WSBA's collaborative role in administering Court appointed Boards, to include current and future boards appointed or established by the Court. Currently, these Boards include the Access to Justice Board, Disciplinary Board, Limited License Legal Technician Board, Limited Practice Board, Mandatory Continuing Legal Education Board and the Practice of Law Board (Court Appointed Boards).
2. Working with the Court to ensure that WSBA's administration of current Court Appointed Boards is consistent with the Court's intent and to share information that will enable the Court Appointed Boards to better serve their missions. This includes providing information regarding the fiscal impact of the Court Appointed Board and substantive measures that could be taken to improve and better facilitate the Boards.
3. Conveying to the court substantive information about the Boards and member concerns.

Implementation of the amendment to the APR 11 ethics requirement.

On October 15, 2020, the MCLE Board submitted a suggested amendment to the Washington Supreme Court. On July 1, 2021, the Washington Supreme Court entered order 25700-A-1349 approving the MCLE Board's suggested amendment. The order is effective September 1, 2022. The amendment to APR 11 requires, per each three-year MCLE reporting period, that each licensed legal professional complete at least one ethics credit in the topic of equity, inclusion, and the mitigation of both implicit and explicit bias in the legal profession and the practice of law.

After receiving a request for course accreditation guidance from MCLE staff, the MCLE Board has continued to provide guidance on courses—that cover issues of diversity, inclusion, and elimination of bias—and whether they will meet the new ethics requirement that went into effect on 9/1/2022. MCLE staff worked with WSBA IT to update the MCLE online system to allow CLE sponsors to apply for “equity...” credit and determine if those courses held on or after 9/1/2022 meet the new ethics requirement.

As the MCLE Board previously reported to the Court, during the annual meeting between the Court and MCLE Board in September 2021, the MCLE Board adopted two policies with the intent to provide guidance for the implementation of “equity credit”.

MCLE Board Policy – Implementation of New Ethics Requirement

This policy establishes 2023-2025 as the first reporting period required to report and certify the new requirement. The policy is intended to allow time for WSBA staff to develop tracking mechanisms in the MCLE database for certification and course accreditation according to the new requirements. In addition, this policy provides time to notify both licensed legal professionals and CLE sponsors of the new requirement.

MCLE Board Policy – Credit Carryover

This policy clarifies that while all ethics credits earned in excess of the reporting period requirement will be carried over as ethics credit in accordance with APR 11(c)(7), a new equity requirement must be earned in each reporting period. This policy is consistent with the current administration of ethics carryover credits: excess ethics credits carryover in its broader, general definition. For example, activities that relate to the ethical risks to practice associated with diagnosable mental health issues, Rules of Professional Conduct, diversity and antibias as it relates to the legal system all currently carryover as ethics credit.

The MCLE Board drafted an article for the *Washington State Bar News* in an effort to provide guidance to licensed legal professionals and answer frequently asked questions¹. MCLE staff is continuing to work

¹ Set to publish in September, the MCLE Board *Bar News* article can be viewed online at: <https://wabarnews.org/archive/>

with WSBA IT to implement tracking of the new ethics requirement for licensed legal professionals into the new online MCLE system.

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 also reviews appeals of denials and holds hearings at the request of licensed legal professionals who also have the option to appeal a denial by the MCLE Board to the Supreme Court.

In total, one hundred and eleven (111) petitions of undue hardship were reviewed by the MCLE Board during the 2021-2022 meeting term. Due to the Court ordered extension of the 2018-2020 reporting period, the 2018-2021 extended reporting period and the 2019 -2021 reporting period were reporting and certifying their MCLE requirements concurrently. The MCLE Board began to receive petitions for both reporting periods in the fall of 2022. Twenty-seven (27) petitions were approved, thirty-eight (38) denied, and forty (40) petitions received a partial approval/partial denial. Five (5) denial decision reviews were requested, and one (1) denial was subsequently reversed, and the petition approved, with the remaining four (4) denials upheld. The MCLE Board held one (1) hearing to review a previous partial denial at the request of a lawyer. At the hearing, the partial denial was subsequently reversed, and the petitioner’s request was granted. Please note that one petition may include several requests regarding MCLE requirements. For comparison, the MCLE Board received a total of sixty-eight (68) petitions during the 2017-2019 reporting period.

Board APR 11 Interpretations

The MCLE Board reviewed eighteen (18) activities at the request of either the MCLE staff or a licensed legal professional. The MCLE Board also discussed various hypothetical CLE applications to assist staff with the accreditation of courses covering equity, inclusion, and the mitigation of bias. The Board discussed issues of target audience, content, and speaker biographies as important points for each accreditation decision, in light of the amendment to the ethics credit category defined in APR 11(f)(2), effective September 1, 2022. The hypotheticals included:

1. A presentation on implicit bias presented by a diversity training professional to a law firm, but with no specific link to the legal profession.
2. A presentation discussing implications of harassment and hostile work environments on marginalized communities, presented by a human resources professional to a government office.

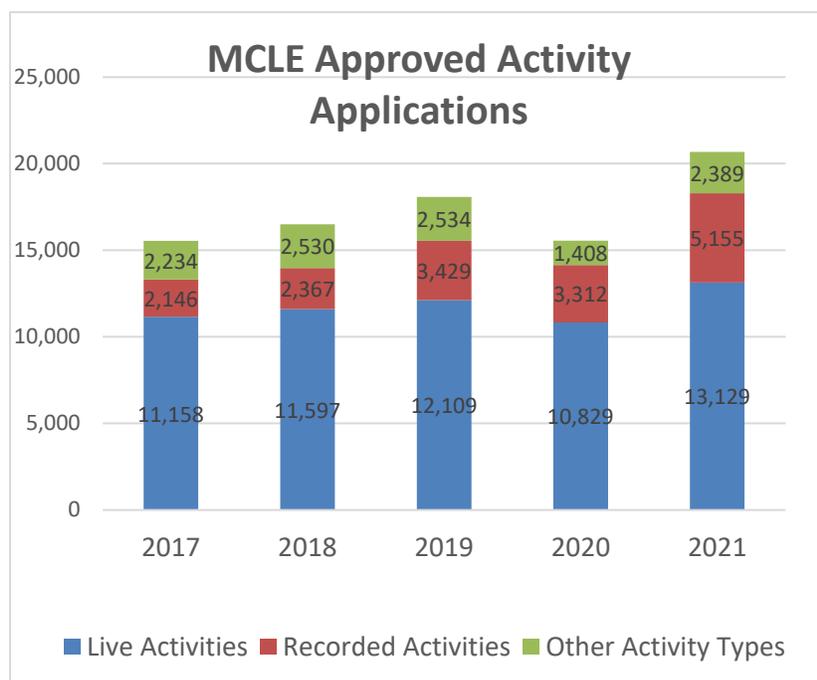
3. A presentation covering the effects of historical bias and legislation and the effects of that legislation today, presented by two lawyers to a university forum. The course is designed for a mixed audience of lawyers, teachers, and law students.

The MCLE Board discussed all three hypothetical courses and decided unanimously that all three would be approved as ethics. The Board encouraged MCLE staff to bring additional ethics accreditation issues to future Board meetings.

Strategies for Mitigating Implicit and Explicit Bias

In an effort to mitigate implicit and explicit bias from the MCLE petition review process, MCLE staff is redacting information pertaining to the petitioner’s identity, such as name, email, and license number before forwarding it to the MCLE Board for review.

MCLE Certification and Activity Submissions



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, and MCLE analysts review and approve thousands of activity applications each year. ²

In addition to CLE activity reviews, MCLE staff handle the certification review process. 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 active membership each year. Due to the Court-ordered extension of the 2018-2020 reporting period (now 2018-2021), twice as many licensed legal professionals were due to certify credits by February 1, 2022. In order to meet and accomplish this increased workload (each individual certification must be reviewed by an MCLE analyst), MCLE staff worked with WSBA IT to open the MCLE certification in July 2021—several months ahead of the customary certification opening month of November.

² The 2020 column of the MCLE Approved Activity Applications table accounts for an additional 514 approved course preparation activities not accounted for in the 2021 annual report.

Over 20,000 licensed legal professional certifications were reviewed and are compliant for the 2018-2021 and 2019-2021 reporting periods. On May 3, 2022, the suspension deadline passed for lawyers, LLLTs, and LPOs in the 2018-2021 and the 2019-2021 MCLE reporting periods. Certification opened on July 1, 2021. On March 4, 2022, the pre-suspension notice was sent to all licensed legal professionals that had not yet completed their licensing or MCLE requirements. On May 5, 2022, a list of 100 licensed legal professionals (96 lawyers and 4 LPOs) were recommended to the WA Supreme Court for administrative suspension for failure to meet their MCLE requirements for the 2018-2021 and 2019-2021 reporting periods. Out of the 100 individuals suspended, 69 licensed legal professionals had outstanding licensing requirements, in addition to incomplete MCLE requirements, listed on the Court order.

Attachments:

1. 2021-2022 MCLE Board Roster
2. MCLE Board Policies
 - Ethics Requirement Implementation
 - Credit Carryover
3. MCLE Board Undue Hardship Decision Matrix
4. MCLE Fee Structure
5. MCLE June 2022 Budget Summary
6. Admission and Practice Rule (APR) 11

2021-2022 MCLE Board Term Report

Attachments

1. 2021-2022 MCLE Board Roster
2. MCLE Board Policies
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 - b. Credit Carryover
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2021-2022 MCLE BOARD

Todd Alberstone (Chair)
Robert J Malae (Vice-Chair)
M. Christopher Bueter
Ayanna Colman
Asia Noel Wright
Efrem Robert Krisher
Merri Hartse

BOG Liaison:
Serena Sayani

Staff Liaison:
Adelaine Shay



MCLE Board Policies
- Ethics Requirement Implementation
- Credit Carryover

BOARD POLICY : Implementation of the New Ethics Credit

The Supreme Court adopted Order No. 25700-A-1349, which amended APR 11(c)(1)(ii) and APR 11(f)(2), to require licensed legal professionals to earn one credit in the category of equity, inclusion, and the mitigation of both implicit and explicit bias (hereinafter referred to as “equity credit”). The MCLE Board issues the following policy to clarify which MCLE reporting period will be the first required to report the new equity credit.

1. The MCLE Board will track the new equity credit—as outlined in APR 11(c)(1)(ii) and APR 11(f)(2)—starting with the 2023-2025 MCLE reporting period. Licensed legal professionals in the 2023-2025 and subsequent MCLE reporting periods will be required to report and certify fulfillment of the equity credit requirement.

BOARD POLICY: Ethics Credit Carryover

The Supreme Court adopted order NO. 25700-A-1349, which amended APR 11(c)(1)(ii) and APR 11(f)(2), to require licensed legal professionals to earn one credit in the category of equity, inclusion, and the mitigation of both implicit and explicit bias (hereinafter referred to as “equity credit”). The MCLE Board issues the following policy to clarify ethics carryover credit. The MCLE Board has determined the following:

1. Equity credit earned in excess of the reporting period requirement may be carried over as ethics credit in accordance with APR 11(c)(7), but a new equity credit must be earned in each reporting period.

MCLE Board Approved
Undue Hardship Petition 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	All other requests	Deny

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

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.

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 RPC 1.8(l) subpart 1 as: parent, child, sibling, or spouse • Death must have occurred within six months of end of reporting period • Refer petition requests on basis of death liberally to the Board if any doubt exists 							
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

No.	SITUATION	CREDITS BY 12/31?	CREDITS DONE After 12/31?	CERTIFIED?	1st Non-Comp RP	>1 Consecutive Non-Comp RP	DECISION
	<p>FINANCIAL HARDSHIP as defined by 200% of Federal Poverty Guidelines based on <u>gross household</u> annual income due to (1) being unemployed or employed with poverty-level wages; (2) major medical expense for self or family member; or (3) bankruptcy. The guidelines are the same ones approved by the BOG in 2010 for determining a one-time waiver of the annual license fee based on financial hardship. (See attached "WSBA License Fee Exemption Request Form".) Offer a payment extension if necessary, taking the following guidelines into consideration:</p> <ul style="list-style-type: none"> • Petition received for financial hardship waiver of late fee; • Waiver was denied or late fee was reduced; • Gross household income between 200-400% of the Federal Poverty Guidelines; • Credit requirements have been met and certified; • The late fee amount owed is equal to or more than \$450; • The fee is paid in full within 3-5 months depending on the amount. 						
B1	FINANCIAL HARDSHIP	Y		Y	X		Waive
B2	FINANCIAL HARDSHIP		Y*	Y*	X		Reduce to \$50 [<i>waive</i> \$100] if paid by the deadline.
B3	FINANCIAL HARDSHIP	Y		N	X		Reduce to \$50 [<i>waive</i> \$100] if paid and certified by the deadline.
B4	FINANCIAL HARDSHIP		Y*/N	Y/N	X		Reduce to \$75 [<i>waive</i> \$75] if paid and certified by the deadline.
B5	FINANCIAL HARDSHIP	Y		Y*		X	Waive \$300 if paid by the deadline.
B6	FINANCIAL HARDSHIP		Y*	Y*		X	Waive \$200 if paid by the deadline.
B7	FINANCIAL HARDSHIP	Y		N		X	Waive \$250 if paid and certified by the deadline.
B8	FINANCIAL HARDSHIP		Y*/N	Y/N		X	Waive \$150 if paid and certified by the deadline.
B9	FINANCIAL HARDSHIP qualifying criteria not met		Y*/N	Y/N	X	X	Deny - Include payment extension language in denial letter.
	<p>MILITARY -- On active military assignment in remote non-U.S. location where mail is slow and unreliable and/or in active combat area. No deadline for payment due to mail unreliability (but will not be compliant until it is paid).</p>						
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
	<p>MAIL DELIVERY PROBLEM</p>						

No.	SITUATION	CREDITS BY 12/31?	CREDITS DONE After 12/31?	CERTIFIED?	1st Non-Comp RP	>1 Consecutive Non-Comp RP	DECISION
E1	Claims certified by 2/1.	Y	Y*	Y*	X	X	Grant if licensed legal professional establishes timely certification or if administrative error; otherwise deny.
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.
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

No.	SITUATION	CREDITS BY 12/31?	CREDITS DONE After 12/31?	CERTIFIED?	1st Non-Comp RP	>1 Con-secutive Non-Comp RP	DECISION
	MISC. REASONS FOR NON-COMPLIANCE						
K1	<p>Certified reporting period roster with a duplicate course; deletion of the course causes credit non-compliance after 12/31.</p> <p>* All other credits were taken within the RP</p> <p>* < or = 4 credits need to be taken to make up credit deficiency.</p> <p>* Credits made up and certified in a timely manner.</p> <p>* Never late before.</p>	Y		Y	X		Reduce late fee to \$75 [<i>waive</i> \$75]. if payment postmarked/delivered to the WSBA by the deadline.
K2	<p>Busy practice / Oversight / Other non-medical or non-financial hardship reason [See "Misc." list below]</p>						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.							
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).							

MCLE Board Direction on Petitions

04/03/2020 Meeting:

- **Regarding Military Spouses Submitting Petitions:** The MCLE Board approved by motion to direct the WSBA Staff Liaison to bring any military spouse petitions to the Board for review.

MCLE Fee Structure
&
June 2022 Budget Summary

MCLE Fee Structure

Fee For CLE Sponsors	
Course Application and Late Fees for CLE Sponsors	Fees
Course Application <i>Note: Government agencies and Nonprofit organizations are not required to pay the application fee when a course is offered for free.</i>	\$ 100 / course
Course Application Late Fee	\$50 / course
Attendance Late Fee	\$50 / submission

Fees For Accredited Sponsor Annual Fees	
<i>Accredited sponsors have the same duties as sponsors but have the additional responsibility of approving their own courses and determining appropriate MCLE credit in accordance with Washington Supreme Court Admission and Practice Rule 11. Accredited sponsors pay an annual flat fee for all course applications submitted in lieu of an application fee for each individual course.</i>	
Number of annual courses	Fees
0-50 courses	\$ 500
51-100 courses	\$ 1,500
101-250 courses	\$ 2,250
251-500 courses	\$ 3,000
501-1000 courses	\$ 4,500
1001 + courses	\$ 6,000

Late Certification By Licensed Legal Professionals	
Certification Late Fees	Fees
Lawyer, LLLT, and LPO Certification Late Fee	Start at \$ 150 and increase by \$ 300 for every consecutive (three-year) period of late compliance.

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2022 to June 30, 2022

75% OF YEAR COMPLETE

	FISCAL 2022 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MANDATORY CONTINUING LEGAL EDUCATION						
REVENUE:						
ACCREDITED PROGRAM FEES	566,556	45,700	467,700	98,856	83%	42,783
FORM 1 LATE FEES	220,000	17,800	179,450	40,550	82%	14,450
MEMBER LATE FEES	400,000	900	421,600	(21,600)	105%	121,600
ANNUAL ACCREDITED SPONSOR FEES	39,250	-	34,500	4,750	88%	5,063
ATTENDANCE LATE FEES	115,000	7,750	93,750	21,250	82%	7,500
COMITY CERTIFICATES	42,000	675	45,325	(3,325)	108%	13,825
TOTAL REVENUE:	1,382,807	72,825	1,242,325	140,481	90%	205,220
DIRECT EXPENSES:						
DEPRECIATION	22,747	1,679	19,414	3,332	85%	(2,354)
STAFF MEMBERSHIP DUES	500	-	500	-	100%	(125)
ONLINE LEGAL RESEARCH	2,114	317	1,261	852	60%	324
LAW LIBRARY	182	23	104	78	57%	33
MCLE BOARD	1,300	-	-	1,300	0%	975
STAFF TRAVEL/PARKING	50	-	-	50	0%	38
STAFF CONFERENCE & TRAINING	6,550	-	-	6,550	0%	4,913
TOTAL DIRECT EXPENSES:	33,442	2,019	21,279	12,163	64%	3,802
INDIRECT EXPENSES:						
SALARY EXPENSE (4 88 FTE)	391,608	23,927	330,826	60,783	84%	(37,119)
BENEFITS EXPENSE	118,897	9,925	85,241	33,655	72%	3,931
OTHER INDIRECT EXPENSE	144,282	9,757	101,836	42,446	71%	6,376
TOTAL INDIRECT EXPENSES:	654,787	43,609	517,903	136,884	79%	(26,813)
TOTAL ALL EXPENSES:	688,230	45,628	539,182	149,047	78%	(23,010)
NET INCOME (LOSS):	694,577	27,197	703,143	(8,566)	101%	182,210

Admission and Practice Rule (APR) 11

APR 11
MANDATORY CONTINUING LEGAL EDUCATION (MCLE)

(a) Purpose. Mandatory continuing legal education (MCLE) is intended to enhance lawyers', LLLTs', and LPOs' legal services to their clients and protect the public by assisting lawyers, LLLTs, and LPOs in maintaining and developing their competence as defined in RPC 1.1 or equivalent rule for LLLTs and LPOs, fitness to practice as defined in APR 20, and character as defined in APR 20. These rules set forth the minimum continuing legal education requirements for lawyers, LLLTs, and LPOs to accomplish this purpose.

(b) Definitions. For the purposes of this rule, the following definitions shall apply:

- (1) "Activity" means any method by which a lawyer, LLLT, or LPO may earn MCLE credits.
- (2) "Attending" means participating in an approved activity or course.
- (3) "Calendar year" means a time period beginning January 1 and ending December 31.
- (4) "Identical activity" means any prior course or other activity that has not undergone any substantial or substantive changes since last offered, provided, or undertaken.
- (5) "Lawyer, LLLT, or LPO" means an active lawyer, LLLT, or LPO of the Bar, a judicial member of the Bar classified as an administrative law judge, and any other lawyer licensed or authorized to practice law in Washington who is required by the Admission and Practice Rules (APR) to comply with this rule.
- (6) "Reporting period" means a three-year time period as assigned by the Bar in which a lawyer, LLLT, or LPO must meet the education requirements of this rule.
- (7) "Sponsor" means a provider of continuing legal education activities.

(c) Education Requirements.

- (1) *Minimum Requirement.* Each lawyer must complete 45 credits and each LLLT and LPO must complete 30 credits of approved continuing legal education by December 31 of the last year of the reporting period with the following requirements:
 - (i) at least 15 credits must be from attending approved courses in the subject of law and legal procedure, as defined in subsection (f)(1); and
 - (ii) at least six credits must be in ethics and professional responsibility, as defined in subsection (f)(2).

- (2) *Earning Credits.* A lawyer, LLLT, or LPO earns one credit for each 60 minutes of attending an approved activity. Credits are rounded to the nearest quarter hour. A lawyer, LLLT, or LPO may earn no more than eight credits per calendar day. A lawyer, LLLT, or LPO cannot receive credit more than once for an identical activity within the same reporting period.
- (3) *New Lawyers, LLLTs, and LPOs.* Newly admitted lawyers, LLLTs, and LPOs are exempt for the calendar year of admission.
- (4) *Military Personnel.* Military personnel in the United States Armed Forces may be granted an exemption, waiver, or modification upon proof of undue hardship, which includes deployment outside the United States. A petition shall be filed in accordance with subsection (i)(5) of these rules.
- (5) *Exemptions.* The following are exempt from the requirements of this rule for the reporting period(s) during which the exemption applies:
 - (i) *Judicial Exemption.* Judicial members of the Bar, except for administrative law judges;
 - (ii) *Supreme Court Clerks.* The Supreme Court clerk and assistant clerk(s) who are prohibited by court rule from practicing law;
 - (iii) *Legislative Exemption.* Members of the Washington State Congressional Delegation or the Washington State Legislature; and
 - (iv) *Gubernatorial Exemption.* The Governor of Washington State.
- (6) *Comity.* The education requirements in Oregon, Idaho, and Utah substantially meet Washington's education requirements for lawyers. These states are designated as comity states. A lawyer may certify compliance with these rules in lieu of meeting the education requirement by paying a comity fee and filing a Comity Certificate of MCLE Compliance from a comity state certifying to the lawyer's subjection to and compliance with that state's MCLE requirements during the lawyer's most recent reporting period.
- (7) *Carryover Credits.* If a lawyer, LLLT, or LPO completes more than the required number of credits for any one reporting period, up to 15 of the excess credits, 2 of which may be ethics and professional responsibility credits, may be carried forward to the next reporting period.

(d) MCLE Board.

- (1) *Establishment.* There is hereby established an MCLE Board consisting of seven members, six of whom must be active lawyers, LLLTs, or LPOs of the Bar and

one who is not licensed to practice law. The Supreme Court shall designate one board member to serve as chair of the MCLE Board. The members of the MCLE Board shall be appointed by the Supreme Court. Appointments shall be staggered for a three-year term. No member may serve more than two consecutive terms. Terms shall end on September 30 of the applicable year.

(2) *Powers and Duties.*

- (i) **Rules and Regulations.** The MCLE Board shall review and suggest amendments or make regulations to APR 11 as necessary to fulfill the purpose of MCLE and for the timely and efficient administration of these rules and for clarification of education requirements, approved activities, and approved course subjects. Suggested amendments are subject to review by the Board of Governors and approval by the Supreme Court.
- (ii) **Policies.** The MCLE Board may adopt policies to provide guidance in the administration of APR 11 and the associated regulations. The MCLE Board will notify the Board of Governors and the Supreme Court of any policies that it adopts. Such policies will become effective 60 days after promulgation by the MCLE Board.
- (iii) **Approve Activities.** The MCLE Board shall approve and determine the number of credits earned for all courses and activities satisfying the requirements of these rules. The MCLE Board shall delegate this power to the Bar subject to MCLE Board review and approval.
- (iv) **Review.** The MCLE Board shall review any determinations or decisions regarding approval of activities made by the Bar under these rules that adversely affect any lawyer, LLLT, or LPO or sponsor upon request of the lawyer, LLLT, or LPO, sponsor, or Bar. The MCLE Board may take appropriate action consistent with these rules after any such review and shall notify the lawyer, LLLT, or LPO or sponsor in writing of the action taken. The MCLE Board's decision shall be final.
- (v) **Fees.** The MCLE Board shall determine and adjust fees for the failure to comply with these rules and to defray the reasonably necessary costs of administering these rules. Fees shall be approved by the Board of Governors.
- (vi) **Waive and Modify Compliance.** The MCLE Board shall waive or modify a lawyer's, LLLT's, or LPO's compliance with the education or reporting requirements of these rules upon a showing of undue hardship filed in accordance with these rules. The MCLE Board may delegate this power to the Bar subject to (1) parameters and standards established by the MCLE Board and (2) review by the MCLE Board.

- (vii) Approve Mentoring Programs. The MCLE Board shall approve mentoring programs that meet requirements and standards established by the MCLE Board for the purposes of awarding MCLE credit under these rules.
 - (viii) Audits for Standards Verification. The MCLE Board may audit approved courses to ensure compliance with the standards set forth in these rules.
- (3) *Expenses and Administration.* Members of the MCLE Board shall not be compensated for their services but shall be reimbursed for actual and necessary expenses incurred in the performance of their duties according to the Bar's expense policies. The Bar shall provide administrative support to the MCLE Board.
- (e) **Approved Activities.** A lawyer, LLLT, or LPO may earn MCLE credit by attending, teaching, presenting, or participating in activities approved by the Bar. Only the following types of activities may be approved:
- (1) Attending, teaching, presenting, or participating in or at a course, provided that any pre-recorded audio/visual course is less than five years old;
 - (2) Preparation time for a teacher, presenter, or panelist of an approved activity at the rate of up to five credits per hour of presentation time, provided that the presentation time is at least 30 minutes in duration;
 - (3) Attending law school courses with proof of registration or attendance;
 - (4) Attending bar review courses for jurisdictions other than Washington with proof of registration or attendance;
 - (5) Writing for the purpose of lawyer, LLLT, or LPO education, when the writing has been published by a recognized publisher of legal works as a book, law review, or scholarly journal article of at least 10 pages, will earn one credit for every 60 minutes devoted to legal research and writing;
 - (6) Teaching law school courses, when the instructor is not a full-time law school professor;
 - (7) Providing pro bono legal services provided the legal services are rendered through a qualified legal services provider as defined in APR 1;
 - (8) Participating in a structured mentoring program approved by the MCLE Board, provided the mentoring is free to the mentee and the mentor is an active member of the Bar in good standing and has been admitted to the practice of law in Washington for at least five years. The MCLE Board shall develop standards for approving mentoring programs; and

- (9) Judging or preparing law school students for law school recognized competitions, mock trials, or moot court. The sponsoring law school must comply with all sponsor requirements under this rule.

(f) Approved Course Subjects. Only the following subjects for courses will be approved:

- (1) *Law and legal procedure*, defined as legal education relating to substantive law, legal procedure, process, research, writing, analysis, or related skills and technology;
- (2) *Ethics and professional responsibility*, defined as topics relating to the general subject of professional responsibility and conduct standards for lawyers, LLLTs, LPOs, and judges, including diversity and antibias with respect to the practice of law or the legal system, and the risks to ethical practice associated with diagnosable mental health conditions, addictive behavior, and stress;
- (3) *Professional development*, defined as subjects that enhance or develop a lawyer's, LLLT's, or LPO's professional skills including effective lawyering, leadership, career development, communication, and presentation skills;
- (4) *Personal development and mental health*, defined as subjects that enhance a lawyer's, LLLT's, or LPO's personal skills, well-being, and awareness of mental health issues. This includes, stress management, and courses about, but not treatment for, anxiety, depression, substance abuse, suicide, and addictive behaviors;
- (5) *Office management*, defined as subjects that enhance the quality of service to clients and efficiency of operating an office, including case management, time management, business planning, financial management, office technology, practice development and marketing, client relations, employee relations, and responsibilities when opening or closing an office;
- (6) *Improving the legal system*, defined as subjects that educate and inform lawyers, LLLTs, or LPOs about current developments and changes in the practice of law and legal profession in general, including legal education, global perspectives of the law, courts and other dispute resolution systems, regulation of the practice of law, access to justice, and pro bono and low cost service planning; and
- (7) *Nexus subject*, defined as a subject matter that does not deal directly with the practice of law but that is demonstrated by the lawyer, LLLT, or LPO, or sponsor to be related to a lawyer's, LLLT's, or LPO's professional role as a lawyer, LLLT, or LPO.

(g) Applying for Approval of an Activity. In order for an activity to be approved for MCLE credit, the sponsor or lawyer, LLLT, or LPO must apply for approval as follows.

- (1) *Sponsor.* A sponsor must apply for approval of an activity by submitting to the Bar an application fee and an application in a form and manner as prescribed by the Bar by no later than 15 days prior to the start or availability of the activity.
 - (i) *Late fee.* A late fee will be assessed for failure to apply by the deadline. The Bar may waive the late fee for good cause shown.
 - (ii) *Repeating Identical Course.* A sponsor is not required to pay an application fee for offering an identical course if the original course was approved and the identical course is offered less than 12 months after the original course.
 - (iii) *Waiver of Application Fee.* The Bar shall waive the application fee for a course if the course is offered for free by a government agency or nonprofit organization. This provision does not waive any late fee.
- (2) *Lawyer, LLLT, or LPO.* A lawyer, LLLT, or LPO may apply for approval of an activity not already approved or submitted for approval by a sponsor by submitting to the Bar an application in a form and manner as prescribed by the Bar. No application fee is required.

(h) Standards for Approval. Application of the standards for approval, including determination of approved subject areas and approved activities in subsections (e) and (f) of this rule, shall be liberally construed to serve the purpose of these rules. To be approved for MCLE credit, all courses, and other activities to the extent the criteria apply, must meet all of the following criteria unless waived by the Bar for good cause shown:

- (1) A course must have significant intellectual or practical content designed to maintain or improve a lawyer's, LLLT's, or LPO's professional knowledge or skills, competence, character, or fitness;
- (2) Presenters must be qualified by practical or academic experience or expertise in the subjects presented and not disbarred from the practice of law in any jurisdiction;
- (3) Written materials in either electronic or hardcopy format must be distributed to all lawyers, LLLTs, and LPOs before or at the time the course is presented. Written materials must be timely and must cover those matters that one would expect for a professional treatment of the subject. Any marketing materials must be separate from the written subject matter materials;
- (4) The physical setting must be suitable to the course and free from unscheduled interruption;
- (5) A course must be at least 30 minutes in duration;

- (6) A course must be open to audit by the Bar or the MCLE Board at no charge except in cases of government-sponsored closed seminars where the reason is approved by the Bar;
- (7) Presenters, teachers, panelists, etc. are prohibited from engaging in marketing during the presentation of the course;
- (8) A course must not focus directly on a pending legal case, action, or matter currently being handled by the sponsor if the sponsor is a lawyer, LLLT, or LPO, private law firm, corporate legal department, legal services provider, or government agency; and
- (9) A course cannot have attendance restrictions based on race, color, national origin, marital status, religion, creed, gender, age, disability, or sexual orientation.

(i) Lawyer, LLLT, or LPO Reporting Requirements.

- (1) *Certify Compliance.* By February 1 of the year following the end of a lawyer's, LLLT's, or LPO's reporting period, a lawyer, LLLT, or LPO must certify compliance, including compliance by comity certification, with the education requirements for that reporting period in a manner prescribed by the Bar.
- (2) *Notice.* Not later than July 1 every year, the Bar shall notify all lawyers, LLLTs, and LPOs who are in the reporting period ending December 31 of that year that they are due to certify compliance.
- (3) *Delinquency.* A lawyer, LLLT, or LPO who does not certify compliance by the certification deadline or by the deadline set forth in any petition decision granting an extension may be ordered suspended from the practice of law as set forth in APR 17.
- (4) *Lawyer, LLLT, or LPO Late Fee.* A lawyer, LLLT, or LPO will be assessed a late fee for either (i) or (ii) below but not both.
 - (i) *Education Requirements Late Fee.* A lawyer, LLLT, or LPO will be assessed a late fee for failure to meet the minimum education requirements of this rule by December 31. Payment of the late fee is due by February 1, or by the date set forth in any decision or order extending time for compliance, or by the deadline for compliance set forth in an APR 17 presuspension notice.
 - (ii) *Certification and Comity Late Fee.* A lawyer, LLLT, or LPO will be assessed a late fee for failure to meet the certification requirements or comity requirements by February 1. Payment of the late fee is due by the

date set forth in any decision or order extending time for compliance or by the deadline for compliance set forth in an APR 17 presuspension notice.

- (iii) *Failure to Pay Late Fee.* A lawyer, LLLT, or LPO who fails to pay the MCLE late fee by the deadline for compliance set forth in an APR 17 presuspension notice may be ordered suspended from the practice of law as set forth in APR 17.
- (5) *Petition for Extension, Modification, or Waiver.* 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 for that reporting period. In consideration of the petition, the MCLE Board shall consider factors of undue hardship, such as serious illness, extreme financial hardship, disability, or military service, that affect the lawyer's, LLLT's, or LPO's ability to meet the education or reporting requirements. The petition shall be filed at any time in a form and manner as prescribed by the Bar, but a petition filed later than 30 days after the date of the APR 17 presuspension notice will not stay suspension for the reasons in the APR 17 presuspension notice.
- (6) *Decision on Petition.* The MCLE Board shall as soon as reasonably practical notify the lawyer, LLLT, or LPO of the decision on a petition. A lawyer, LLLT, or LPO may request review of the decision by filing, within 10 days of notice of the decision, a request for a hearing before the MCLE Board.
- (7) *Hearing on Petition.* Upon the timely filing of a request for hearing, the MCLE Board shall hold a hearing on the petition.
 - (i) The MCLE Board shall give the lawyer, LLLT, or LPO at least 10 days', written notice of the time and place of the hearing.
 - (ii) Testimony taken at the hearing shall be under oath and recorded.
 - (iii) The MCLE Board shall issue written findings of fact and an order consistent with these rules as it deems appropriate. The MCLE Board shall provide the lawyer, LLLT, or LPO with a copy of the findings and order.
 - (iv) The MCLE Board's order is final unless within 10 days from the date thereof the lawyer, LLLT, or LPO files a written notice of appeal with the Supreme Court and serves a copy on the Bar. The lawyer, LLLT, or LPO shall pay to the Clerk of the Supreme Court any required filing fees.
- (8) *Review by the Supreme Court.* Within 15 days of filing a notice with the Supreme Court for review of the MCLE Board's findings and order, after such a noncompliance petition hearing, the lawyer, LLLT, or LPO shall cause the record

or a narrative report in compliance with RAP 9.3 to be transcribed and filed with the Bar.

- (i) The MCLE Board chairperson shall certify that any such record or narrative report of proceedings contains a fair and accurate report of the occurrences in and evidence introduced in the cause.
 - (ii) The MCLE Board shall prepare a transcript of all orders, findings, and other documents pertinent to the proceeding before the MCLE Board, which must be certified by the MCLE Board chairperson.
 - (iii) The MCLE Board shall then file promptly with the Clerk of the Supreme Court the record or narrative report of proceedings and the transcripts pertinent to the proceedings before the MCLE Board.
 - (iv) The matter shall be considered by the Supreme Court pursuant to procedures established by order of the Court, which may in the Court's discretion consist of consideration solely on the basis of the record presented to the MCLE Board.
 - (v) The times set forth in this rule for filing notices of appeal are jurisdictional. The Supreme Court, as to appeals pending before it, may, for good cause shown, (1) extend the time for the filing or certification of said record or narrative report of proceedings and transcripts or, (2) dismiss the appeal for failure to prosecute the same diligently.
- (9) *Compliance Audits.* The Bar may audit an individual lawyer's, LLLT's, or LPO's compliance certification to substantiate participation in the activities listed in the certification. The Bar may request records from a lawyer, LLLT, or LPO, or sponsor for the purpose of conducting the audit and the lawyer, LLLT, or LPO must comply with all such requests. Where facts exist that indicate a lawyer, LLLT, or LPO may not have participated in the activities certified to, the lawyer, LLLT, or LPO may be referred to the Bar's Office of Disciplinary Counsel and/or credit for the activities may be rescinded.
- (j) **Sponsor Duties.** All sponsors must comply with the following duties unless waived by the Bar for good cause shown:
- (1) The sponsor must not advertise course credit until the course is approved by the Bar but may advertise that the course credits are pending approval by the Bar after an application has been submitted. The sponsor shall communicate to the lawyer the number of credits and denominate whether the credits are "law and legal procedure" as defined under subsection (f)(1), "ethics and professional responsibility" as defined under subsection (f)(2), or "other," meaning any of the other subjects identified in subsections (f)(3)-(7).

- (2) The sponsor must provide each participant with an evaluation form to complete. The forms or the information from the forms must be retained for two years and provided to the Bar upon request.
- (3) The sponsor must submit an attendance report in a form and manner as prescribed by the Bar and pay the required reporting fee no later than 30 days after the conclusion of the course. A late fee will be assessed for failure to report attendance by the deadline.
 - (i) *Waiver of Reporting Fee.* The Bar shall waive the reporting fee for a course if the course is offered for free by a government agency or nonprofit organization. This provision does not waive any late fee.
- (4) The sponsor must retain course materials for four years from the date of the course. Upon request of the Bar, a sponsor must submit for review any written, electronic, or presentation materials, including copies of audio/visual courses.
- (5) The sponsor must keep accurate attendance records and retain them for six years. The sponsor must provide copies to the Bar upon request.
- (6) The sponsor shall not state or imply that the Bar or the MCLE Board approves or endorses any person, law firm, or company providing goods or services to lawyers, LLLTs, or LPOs, or law firms.
- (7) *Accredited Sponsors.* The Bar may approve and accredit sponsoring organizations as “accredited sponsors” subject to procedures and fees established by the Bar. Accredited sponsors have the same duties as sponsors but have the additional responsibility of approving their own courses and determining appropriate MCLE credit in accordance with this rule. Accredited sponsors pay an annual flat fee for all course applications submitted in lieu of an application fee for each individual course.

(k) Confidentiality. Unless expressly authorized by the Supreme Court or by the lawyer, LLLT, or LPO, all files and records relating to a lawyer’s, LLLT’s, or LPO’s individual MCLE requirements are confidential and shall be privileged against disclosure except as necessary to conduct an investigation, hearing, and appeal or review pursuant to these rules. This provision does not apply to the Bar except that such records shall not be disclosed to Bar staff responsible for creating or marketing CLE products.

[Adopted effective January 1, 2016; amended effective September 1, 2017.]

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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 Bryn Peterson (Co-Chairs)
Staff Liaison: <i>(include name, job title, and department if known)</i>	Kevin Plachy and Michael Kroner
Board of Governors Liaison:	N/A
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
The Council shall seek to educate members in a proactive manner about WSBA's and Board of Governor's actions and work, seek input 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 voluntary bars, WSBA sections, minority bar associations, and through 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 provide 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) by staying connected to the membership through regular feedback mechanisms the organization can adapt to the changing needs in the profession and ensure the services and benefits provided to members are relevant to the needs of the profession and the public we serve.

2021 -2022 Entity Accomplishments:

1. Reorganized the entity from the Member Engagement Workgroup to the Member Engagement Council. This reorganization reconstituted the entity from a short-term workgroup to an ongoing Council composed of WSBA members and BOG members.
2. Developed and deployed the quarterly member survey. Reviewed results and continue to monitor them. We have partnered with NBRI, professional survey company, which will provide annual, expert feedback to the MEC.
3. Worked with NBRI to develop and administer an ETHOS member survey at the request of the Board. The survey assisted in the Board’s recommendation with regards to the WSBA structure.

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	Intentional and ongoing engagement with the Voluntary Bars across Washington.
2	Continued engagement with members through the NBRI Quarterly Member Survey. Ongoing review of survey results along with a plan to make recommendations for improvement based on survey results.
3	Work with WSBA staff and the BOG in assessing volunteer engagement with the organization through the use of our ongoing survey to members.
4	Click or tap here to enter text.
5	Click or tap here to enter text.

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

How have you elicited input from a variety of perspectives in your decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive, and eventually lead the profession? Other?

The MEC is seeking 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 incorporate a plan to address the responses to these questions into our FY23 goals and priorities.

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.

This has been a monumental year for MEC, we proposed and successfully passed a charter to designate the group as WSBA Council, conducted member survey that assisted the board in making its final decision on the Structure of the Bar. All of these and many more could not have been possible but for the dedication of WSBA staff and commitment of MEC volunteer and WSBA members.

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

Size of Entity:	12
Number of Applicants for FY23: <i>(October 1, 2022 – September 30, 2023)</i>	4
Number of current volunteer vacancies for this entity:	0
Direct Expenses:	Click or tap here to enter text.
Indirect Expenses:	Click or tap here to enter text.

FY22 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.

Note: The Member Engagement Council is largely comprised of members of the Board of Governors. Applicants for the Board of Governors do not complete the WSBA Volunteer Application process and therefore are not asked to provide demographic information.

Disability	No	33%
	Unknown	67%
District*	1	8%
	3	17%
	5	8%
	6	8%
	7N	8%
	8	25%
	9	25%
Ethnicity	Asian – Southeast Asian	8%
	Asian – South Asian	8%
	White or European Descent	17%
	Unknown	67%
Gender	Female	25%
	Male	8%
	Unknown	67%

Sexual Orientation	Heterosexual	25%
	No	8%
	Unknown	67%

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.

Practice of Law Board*Provided by WSBA Staff**Dated October 25, 2022***FY22 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	71%
	Yes	21%
	Chose Not to Respond	8%
District*	1	43%
	5	7%
	8	7%
	9	7%
	Unknown	36%
Ethnicity	Asian – East Asian	7%
	Black, African American, or African Descent	14%
	White or European Descent	79%
	Multi Racial or Biracial	7%
	Chose Not to Respond	0%
Gender	Female	43%
	Male	50%
	Chose Not to Respond	7%
Sexual Orientation	Heterosexual	86%
	Chose Not to Respond	14%

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 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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 and Public Service Committee
Chair or Co-Chairs:	Bonnie Rosinbum and Michael Addams
Staff Liaison: <i>(include name, job title, and department if known)</i>	Saleena Salango
Board of Governors Liaison:	Matthew Dresden
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
The purpose of the Pro Bono and Public Service Committee (PBPSC) is to serve 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 fulfills its purpose by promoting opportunities and best practices that encourage WSBA members to engage in pro bono and public service.	
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 PBPSC serves the public and members of the Bar by supporting and promoting pro bono and public service work. The PBPSC ensures integrity of the legal profession by promoting a culture of public service and pro bono among WSBA members. PBPSC champions justice by promoting pro bono and public service to help close the access to justice gap and serve communities that experience poverty and injustice.	

2021 -2022 Entity Accomplishments:

The PBPSC accomplishments were performed by the committee’s subcommittees and workgroups:

- The Strategic Planning subcommittee developed a multi-year plan to stay community-informed and merged the existing Communications Subcommittee with the Technology Workgroup to incorporate the use of ProBonoWA.org into the Committee’s overall communication plan.
- The CLE subcommittee collaborated with the WSBA CLE team to host a free Legal Lunchbox in October 2021 entitled “How Minor Guardianship Has Changed and Adult Guardianship Will Change Under the New UGA”. The subcommittee also collaborated with the Diversity Committee on the February Legal Lunchbox centered on voter suppression. This subcommittee recruited volunteer speakers for the October 2022 Legal Lunchbox that centers on domestic violence protection orders.
- The Communications Subcommittee wrote and published articles in the Washington State Bar News Magazine and NW Sidebar to promote the WSBA Moderate Means Program and use of the new ProBonoWA.org website, as well as an article regarding the need for legal assistance to youth aging out of the foster care system. The Communications Subcommittee will continue the work in building and maintaining ProBonoWA.org, including enabling and managing features that allow organizations to post pro bono cases and volunteer opportunities.
- The Rules & Policy Subcommittee conducted outreach to QLSPs, government pro bono programs, and other stakeholders to draft a proposed rule change to [APR 1\(e\)\(8\)](#). This proposed change would have expanded the definition of QLSP to include pro bono programs sponsored by a government entity that would otherwise not currently qualify for QLSP status. While the PBPSC declined to move forward with the original proposal, the committee is now collaborating and researching other methods to support these government sponsored pro bono programs without the need for a change to the definition of QLSP.

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	Dedicate committee time to brainstorming and implementing creative ways to proactively assist stakeholders and better understand areas of need.
2	Improve and diversify methods of external communication between the committee and justice-partner organizations, WSBA membership, and other interested stakeholders.
3	Increase use of probonowa.org by both WSBA members looking for pro bono opportunities and the organizations that provide them.
4	Internally, determine the committee's role in supporting "public service" organizations, in contrast to the clear role of the committee in supporting "pro bono" service.
5	As we continue to acclimate to a mostly remote environment, improve communications and connections within the committee, including devoting time to planning at least one in-person meeting.

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 co-chairs frequently solicit input from every Committee member. The Committee’s work is structured into separate subcommittees that allow for any member to take a leadership role and/or advance the work of the Committee. The Committee frequently seeks input and opportunities for collaboration with QLSPs, VLPs, Minority Bar Associations, and other groups to stay informed by organizations serving legal professionals and client communities that experience poverty and injustice. The Committee has included Diversity, Equity, and Inclusion in the organizational values and regularly review decisions being made to be sure they are in line with these values, including when adding new members to the Committee.

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 PBPSC has greatly enjoyed and appreciated the support of the assigned BOG liaison. Through his support and the support of our assigned staff liaison, the Committee has felt well informed and connected to the overall mission of the WSBA. The staff support has been key to keeping the work of the Committee moving forward and has been vital to internal and external communication. Increased use and access to collaborative tools such as Microsoft Teams and OneDrive/SharePoint would further improve the ability of the Committee to collaborate on projects.

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

Size of Entity:	18
Number of Applicants for FY23: <i>(October 1, 2021 – September 30, 2022)</i>	14
Number of current volunteer vacancies for this entity:	1
Direct Expenses:	\$2,000
Indirect Expenses:	\$47,998

FY22 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*	1	14%
	5	14%
	6	7%

	7N	7%
	7S	21%
	7X	7%
	9	14%
	10	14%
Ethnicity	Asian – East Asian	7%
	Asian – South Asian	7%
	Asian – Southeast Asian	7%
	White or European Descent	71
	Chose Not to Respond	8%
Gender	Female	71%
	Male	29%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	7%
	Heterosexual	93%

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 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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:	WSBA Small Town and Rural (“STAR”) Committee
Chair or Co-Chairs:	Hunter M. Abell
Staff Liaison: <i>(include name, job title, and department if known)</i>	Julianne Unite – WSBA Member Services and Engagement Manager
Board of Governors Liaison:	N/A
Purpose of Entity: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
“...to strengthen and support the practice of law in the rural communities throughout Washington state.” – STAR Committee Charter.	
Strategy to Fulfill Purpose:	
The STAR Committee’s strategy to fulfill its purpose is encapsulated in a three-phase strategic plan adopted in May 2022 by the full STAR Committee. The three phases are summarized as follows: Phase One – Host a rural career fair; Phase Two – Establish a rural practice section and secure funding for a .5 WSBA FTE to address rural practice issues; and Phase Three – Develop a post-graduate rural practice fellowship and explore loan forgiveness for practitioners in rural areas.	
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 Committee 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.	

2021 -2022 Entity Accomplishments:	
This was the STAR Committee’s first full year of operation. Consequently, the top priorities were getting established, organizing into sub-committees, and outlining the Committee’s goals and plans for the coming year(s). This culminated in the May 2022 adoption of the STAR Committee’s three-phase strategic plan.	
Looking Ahead: 2022-2023 Top Goals & Priorities:	
1	Carry out the STAR Committee’s three-phase strategic plan (see above).
2	Inform and help execute a Bar News issue devoted to rural practice issues.
3	Ensure greater visibility for the STAR Committee in the statewide legal practice.
4	Click or tap here to enter text.
5	Click or tap here to enter text.
<p>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></p>	
<p>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. The Chair has invited interested parties from all over the state to participate in the meetings and several are attending regularly (ATJ, Public Defense and others). These parties also participate routinely in the meetings.</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>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.</p>	
<p>Entity Detail & Demographics Report: <i>To Be Completed by WSBA Staff</i></p>	
Size of Entity:	13
Number of Applicants for FY23 <i>(October 1, 2022 – September 30, 2023)</i>	10
Number of current volunteer vacancies for this entity:	0

Direct Expenses:	\$2,000	
Indirect Expenses:	\$34,641	
FY22 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	54%
	Yes	15%
	Chose Not to Respond	31%
District*	1	15%
	2	8%
	3	8%
	5	38%
	7S	8%
	8	8%
	9	15%
Ethnicity	Asian – South Asian	8%
	Latino/a or Latinx	8%
	White or European Descent	54%
Gender	Female	46%
	Male	15%
	Non-Binary	8%
	Chose Not to Respond	31%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual, or Queer	8%
	Heterosexual	38%
	No	8%
	Chose Not to Respond	46%
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

FY 2022: October 1, 2021 – September 30, 2022

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 Boardsⁱ), 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, 2021 – September 30, 2022. 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:	Emily Ann Albrecht
Staff Liaison: <i>(include name, job title, and department if known)</i>	Curtiss Melvin
Board of Governors Liaison:	Jordan Couch
Purpose of Entity:	
<p>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:</p> <p>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; and 3) upholding and supporting the Guiding Principles of the WSBA. the interest and participation of new and young lawyers and law students in the activities of the WSBA;</p> <p>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; and</p> <p>3) upholding and supporting the Guiding Principles of the WSBA.</p>	

Strategy to Fulfill Purpose:

This year's focus on fulfilling the WYLC's purpose continued to involve five key areas:

1. Outreach and communication;
2. Debt;
3. Public Service and Leadership;
4. Access to justice and Rural Recruitment and Retention; and
5. ABA YLD Representation.

The accomplishments and FY22 goals outlined in this document reflect how the work of the WYLC addresses these priorities and fulfills the purpose of the WYLC. These priorities are focused on the key areas identified in the November 2014 and June 2020 new lawyer surveys, July 25, 2015 Generative Discussion of the BOG with the WYLC for key issues facing new and young lawyers: Employment, Debt, Community, and Leadership. Project team members may involve constituents who are not members of the WYLC to help accomplish the project team goals.

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) 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) The WYLC successfully held its first in-person social events this year at The Almo in Tacoma, WA after their WYLC meeting in July.
- 3) The WYLC continues to encourage all new and young lawyers to participate in public service.

2021-2022 Entity Accomplishments:

- 1) The WYLC continued efforts to help new and young lawyers navigate through difficult issues and connect with the WSBA and its member services to the extent possible given the restrictions resulting from the ongoing COVID-19 pandemic and variants.
- 2) The WYLC continued to be engaged with American Bar Association's Young Lawyers Division and appointed the new ABA YLD District Representative for Washington and Oregon.
- 3) The WYLC has been working on ways to encourage new and young lawyer engagement, as well as WYLC members' recruitment and retention in light of the COVID-19 pandemic, including the impact of having virtual only and/or hybrid meetings.
- 4) The WYLC successfully held an in-person social events when possible given the ongoing COVID-19 pandemic and fluctuating restrictions in light of the variants.
- 5) The WYLC partnered with The Iowa Young Lawyers Division (IYLD) by drafting a MOU and got it approved by leadership. The partnership mutual interest is to promote entry into the legal profession in a transparent, affordable, and fair manner.

Looking Ahead: 2022-2023 Top Goals & Priorities:	
1	Increase WYLC member engagement and participation.
2	Identify and prioritize WYLC member needs (and whether those needs have changed).
3	Develop action items and programming designed to meet the WYLC needs.
4	Click or tap here to enter text.
5	Click or tap here to enter text.
<p>Please report 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></p>	
<p>The WYLC created the Public Service and Leadership Award (PSLA) to highlight the work of new and young community leaders who also make a difference through public service. This year WYLC honored four new young lawyers with the PSLA. Each recipient will be eligible to attend one WSBA-CLE program of up to six credits total to be used within one year of receiving the award. Congratulations to Cameron Sheldon, Jessica Roberts, Sarah Jahns, and Rose McCarty. The WYLC also partnered with ABA GP Solo and provided \$500 for their social event.</p>	
<p>Please describe the relationship with WSBA staff and the Board of Governors. <i>For example:</i></p> <ul style="list-style-type: none"> • <i>Quality of WSBA staff support/services</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>Curtiss Melvin has worked diligently in his role as WSBA Staff Liaison. Member Services and Engagement Administrative Assistant Chelle Gegax also regularly attends meetings to support the WYLC members.</p> <p>Russell Knight completed his term as the BOG’s Young Lawyer Liaison. Russell attended all or nearly all meetings this year, briefing the WYLC members on BOG activities, fielding members questions, and providing insights. He made himself available for conversation on request.</p> <p>Former WYLC Chair Jordan Couch will serve the new BOG Young Lawyer Liaison and the WYLC is excited to continue working with him.</p> <p>In FY20, individual members of the BOG have made themselves available for private discussions and advice regarding WYLC activities with past-chair Brian Neuharth.</p> <p>The WYLC needs direction on how to create a larger debt taskforce that exists within the WSBA, but outside of the WYLC.</p>	
<p>Entity Detail & Demographics Report: <i>To Be Completed by WSBA Staff</i></p>	
Size of Entity:	18
Number of Applicants for FY22 <i>(October 1, 2022 – September 30, 2023)</i>	7

How many current volunteer position vacancies for this entity?	4	
Direct Expenses:	\$7,500	
Indirect Expenses:	\$34, 641	
FY22 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	7%
	Chose Not to Respond	17%
District*	0	7%
	2	21%
	4	7%
	5	7%
	6	14%
	7N	7%
	7S	14%
	9	14%
	10	7%
Ethnicity	Asian – Southeast Asian	7%
	Black, African American, or African Descent	14%
	Latino/a or Latinx	14%
	White or European Descent	64%
	Multi Racial	21%
Gender	Female	50%
	Male	43%
	Chose Not to Respond	7%
Sexual Orientation	Gay, Lesbian, Bisexual, Pansexual or Queer	21%
	Heterosexual	64%
	Chose Not to Respond	15%

ⁱⁱ 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.

MEMO

To: Terra Nevitt, WSBA Executive Director
From: Douglas J. Ende, WSBA Chief Disciplinary Counsel & Director of the Office of Disciplinary Counsel
Date: January 5, 2023
Re: Quarterly Discipline Report, 3rd Quarter (July – September 2022)

A. Introduction

The Washington Supreme Court’s exclusive responsibility to administer the systems for discipline of licensed legal professionals (including disability systems) is delegated by court rule to WSBA. See GR 12.2(b)(6). Staff and volunteers carrying out the functions delegated by the Rules for Enforcement of Lawyer Conduct (ELC) act under the Supreme Court’s authority. The investigative and prosecutorial function is discharged by the employees in the Office of Disciplinary Counsel (ODC), which is responsible for investigating allegations and evidence of professional misconduct and incapacity and prosecuting violations of the Washington Supreme Court’s Rules of Professional Conduct.

The Quarterly Discipline Report provides a periodic overview of the functioning of the Office of Disciplinary Counsel. The report graphically depicts key discipline-system indicators for the 3rd Quarter 2022. Note that all numbers and statistics herein are considered tentative/approximate. Final figures will be issued in the 2022 Discipline System Annual Report.

B. Public Dispositions & Other Information

• **Public Dispositions**

Suspensions:

Gordy Daniel, #18917, three-month suspension (*Stipulation*)

Resignations in Lieu of Discipline:

Fred Inman, #57944

Patrick Leahy, #10912

Terry Williams, #21831

Jeffrey Sadler, #27136

Reprimands:

Timothy Dack, #18870 (*Stipulation*)

Michael Kelly, #31816 (*Stipulation*)

Admonitions:

Anne van Leynseele, #45794 (two admonitions) (*Stipulation*)

Reciprocal Discipline:

Micah Fargey, #50120, disbarment (Oregon)

Lara Gardner, #42443, reprimand (Oregon)

Kathy Hao, #55972, six-month suspension (United States Patent and Trademark Office)

Myles Johnson, #47642, six-month suspension (Louisiana)

David Kashani, #45829, reprimand (California)

Patrick Megaro, #50050, five-year suspension (North Carolina)

- **ELC 7.1 and 7.2 Interim Suspensions**

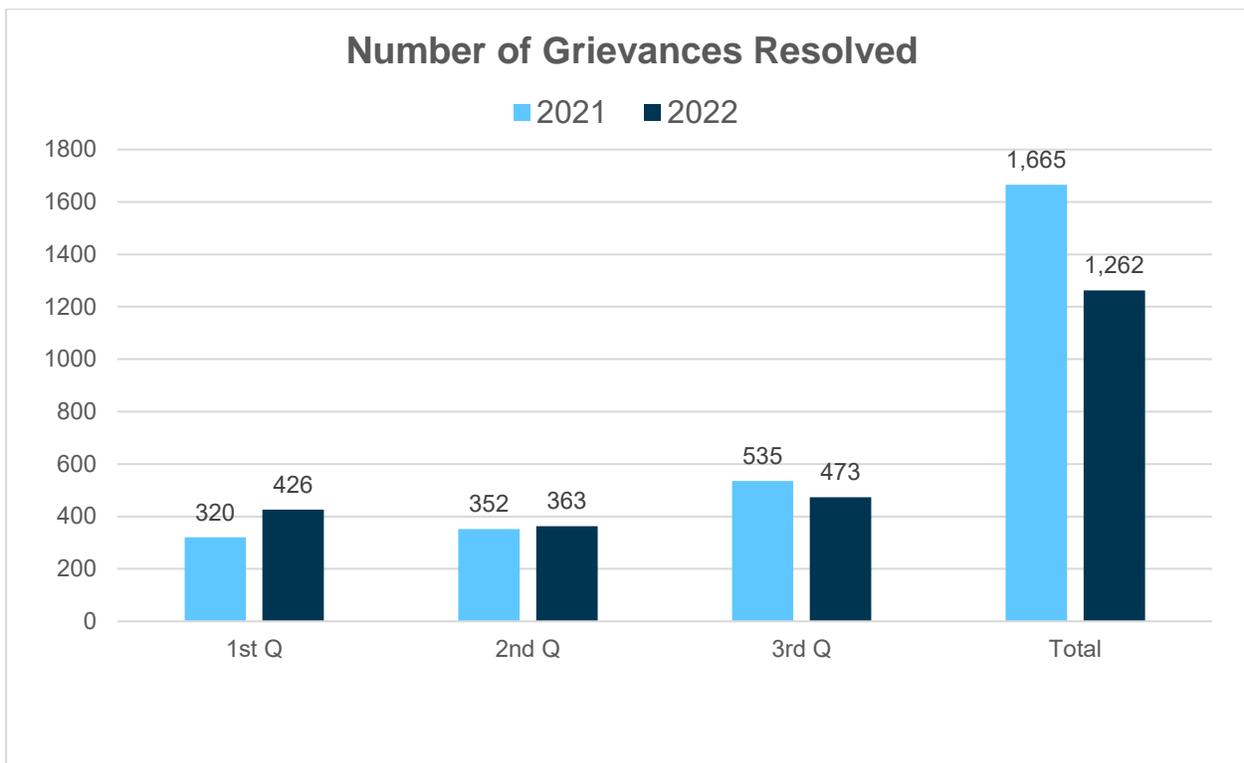
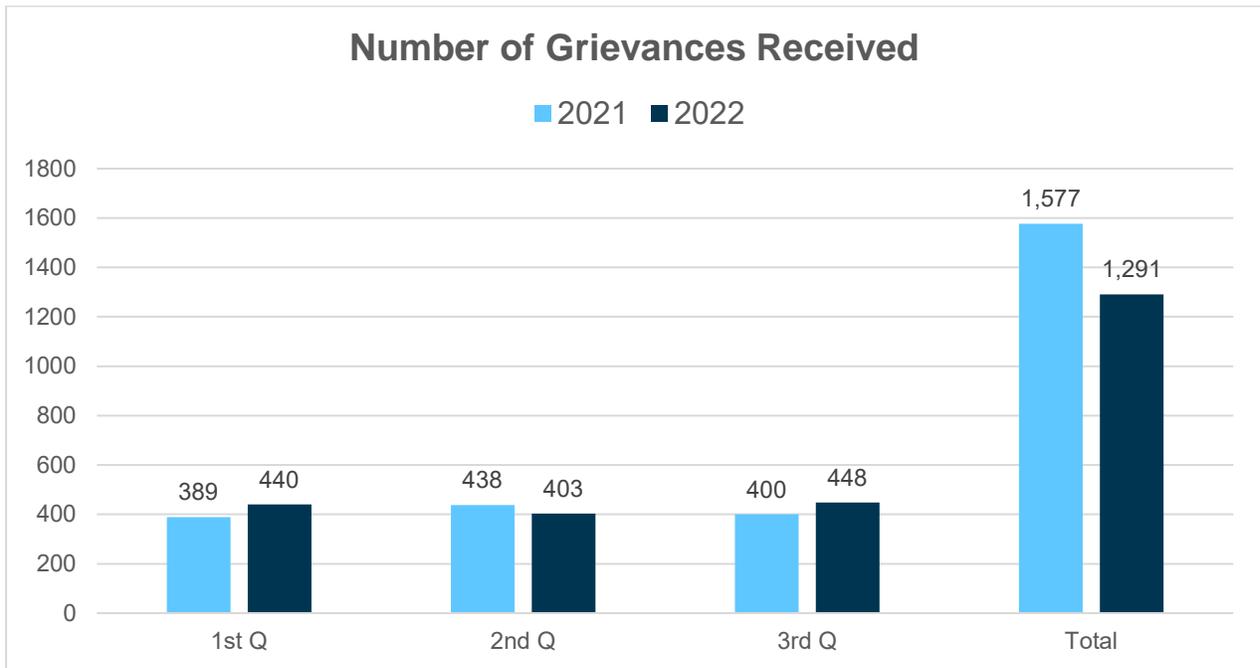
ELC 7.1:

Fred Inman, #57944 (conviction of a crime)

- **Hearings, Appeals, and Other Proceedings**

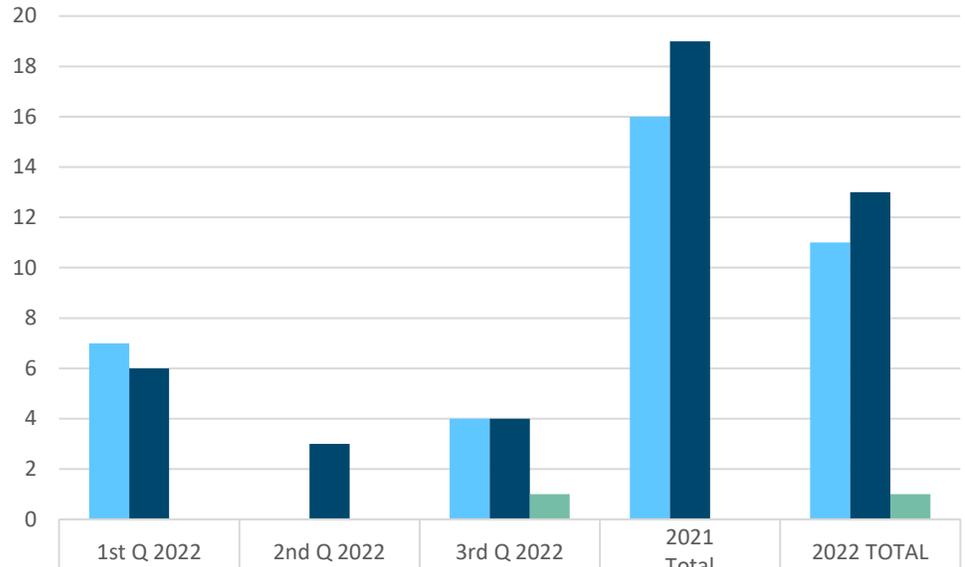
One hearing was held this quarter and there were two default hearings. As previously reported, there was an overall reduction in the number of contested hearings during the 2020-2021 COVID-19 public health emergency. The effects of that reduction are still affecting the discipline-system proceedings pipeline, most notably in the corresponding lull in the number of pending appeals and review proceedings before the Disciplinary Board and Supreme Court.

C. Grievances and Dispositions¹



¹ These figures may vary from subsequent quarterly reports and statistical summaries owing to limitations on data availability at the time of issuance of these quarterly reports.

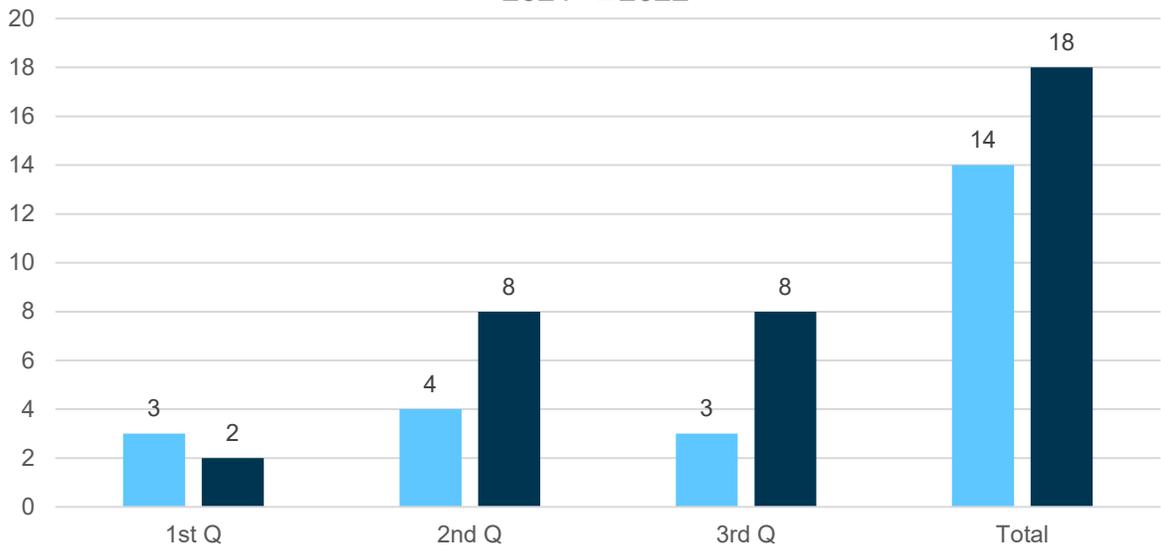
Diversion Statistics

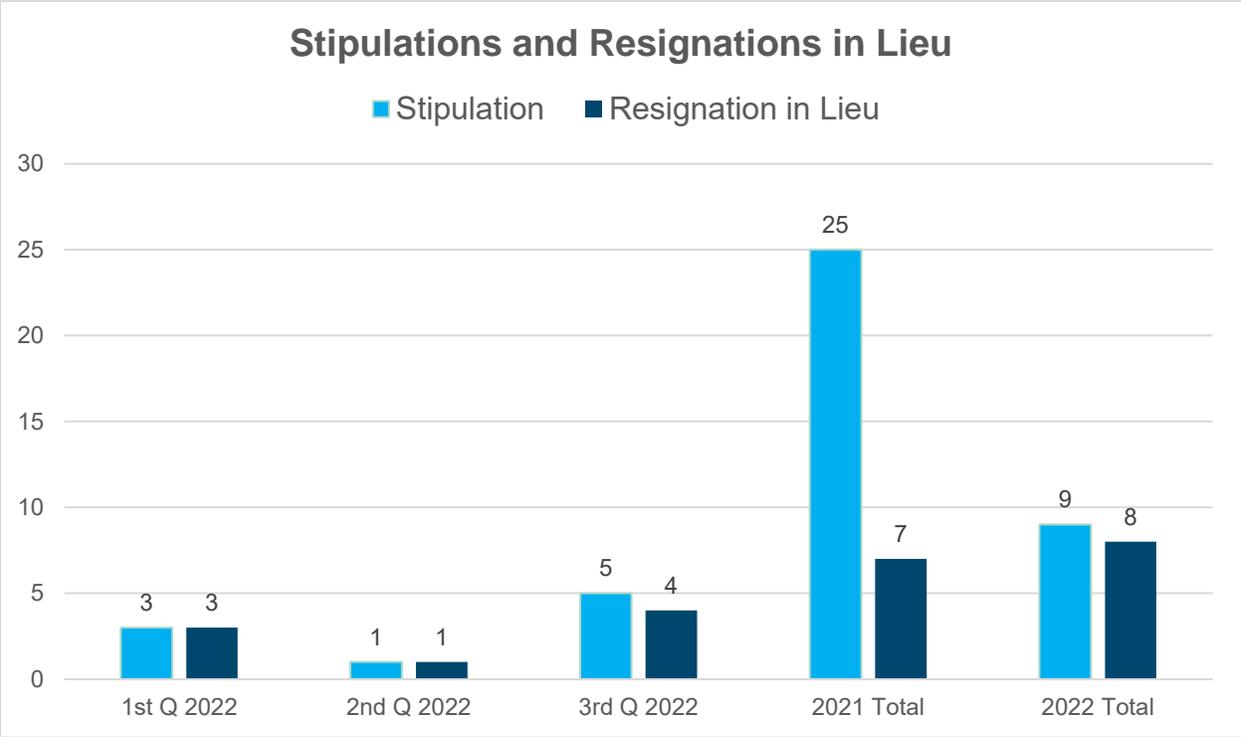
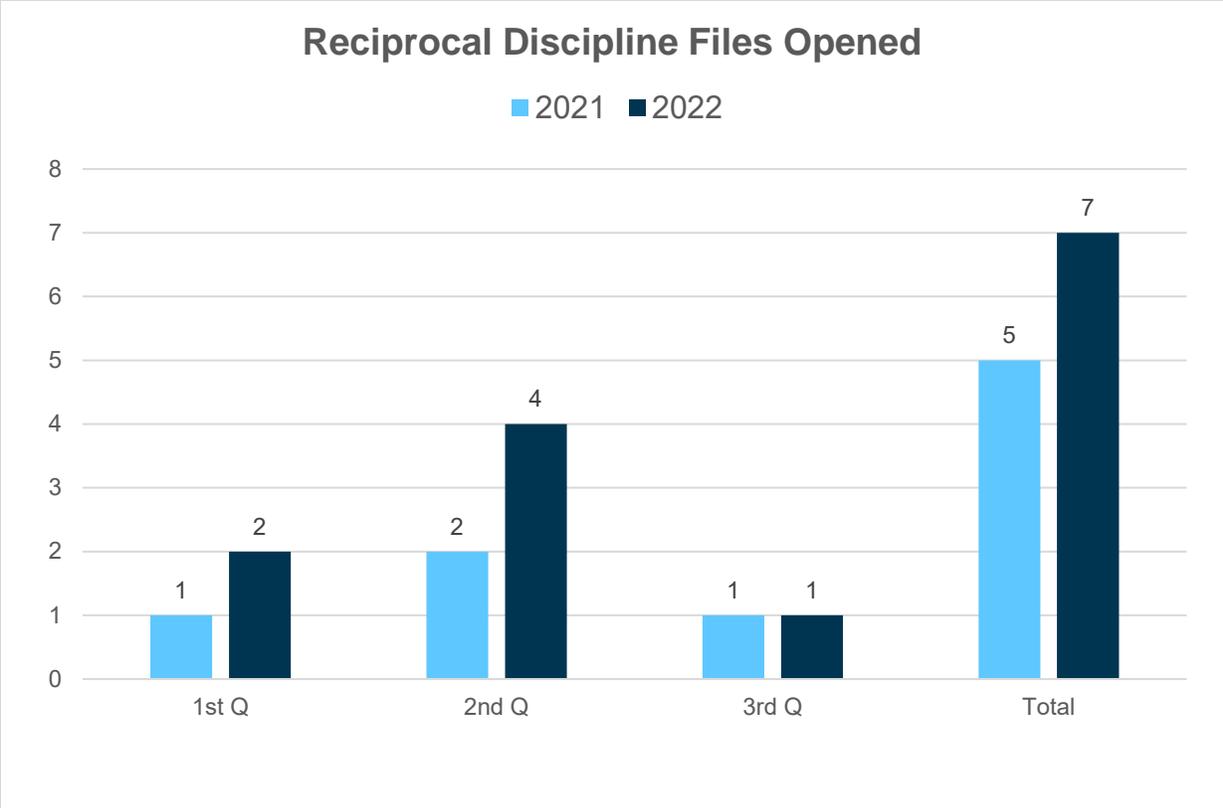


	1st Q 2022	2nd Q 2022	3rd Q 2022	2021 Total	2022 TOTAL
New Diversion Files	7	0	4	16	11
Completed Diversion Files	6	3	4	19	13
Terminated Diversion Files	0	0	1	0	1

Formal Complaints Filed

■ 2021 ■ 2022



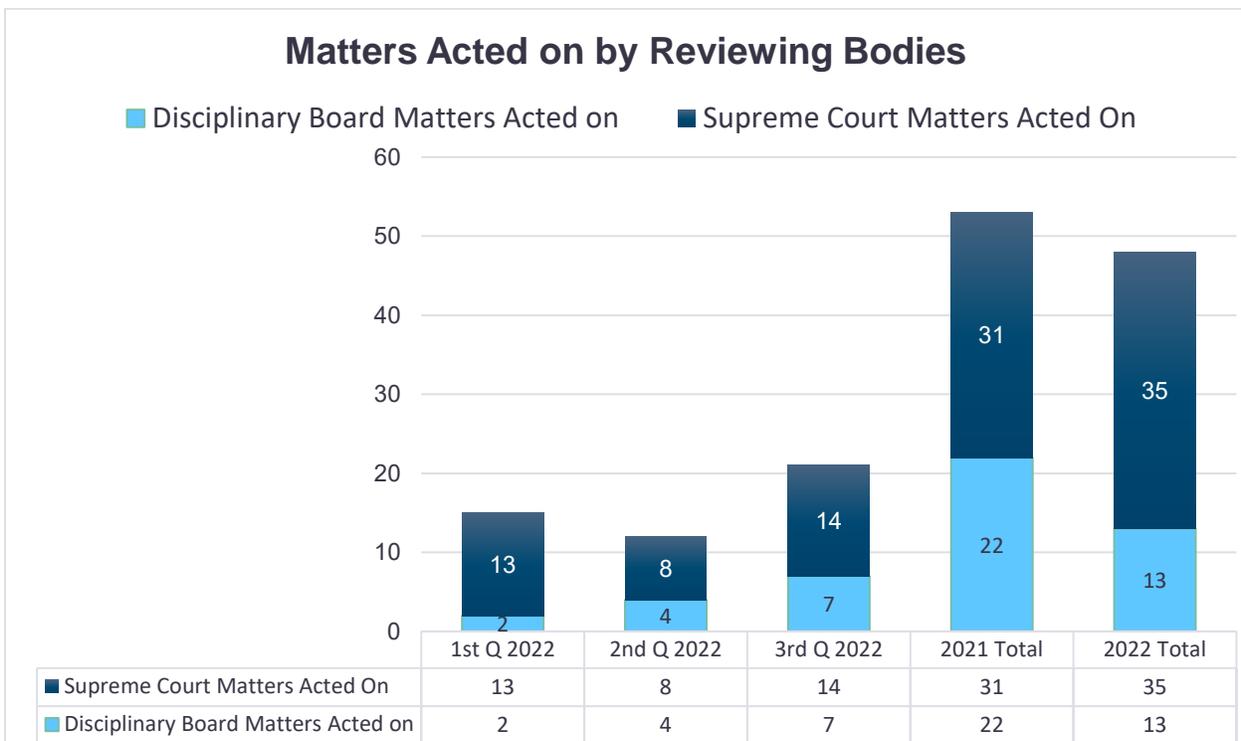


Hearings Held ²	Quarter Total
1 st Quarter	0
2 nd Quarter	2
3 rd Quarter	3
4 th Quarter	TBD
2022 Total	5
2021 Total	7

² Includes default hearings.

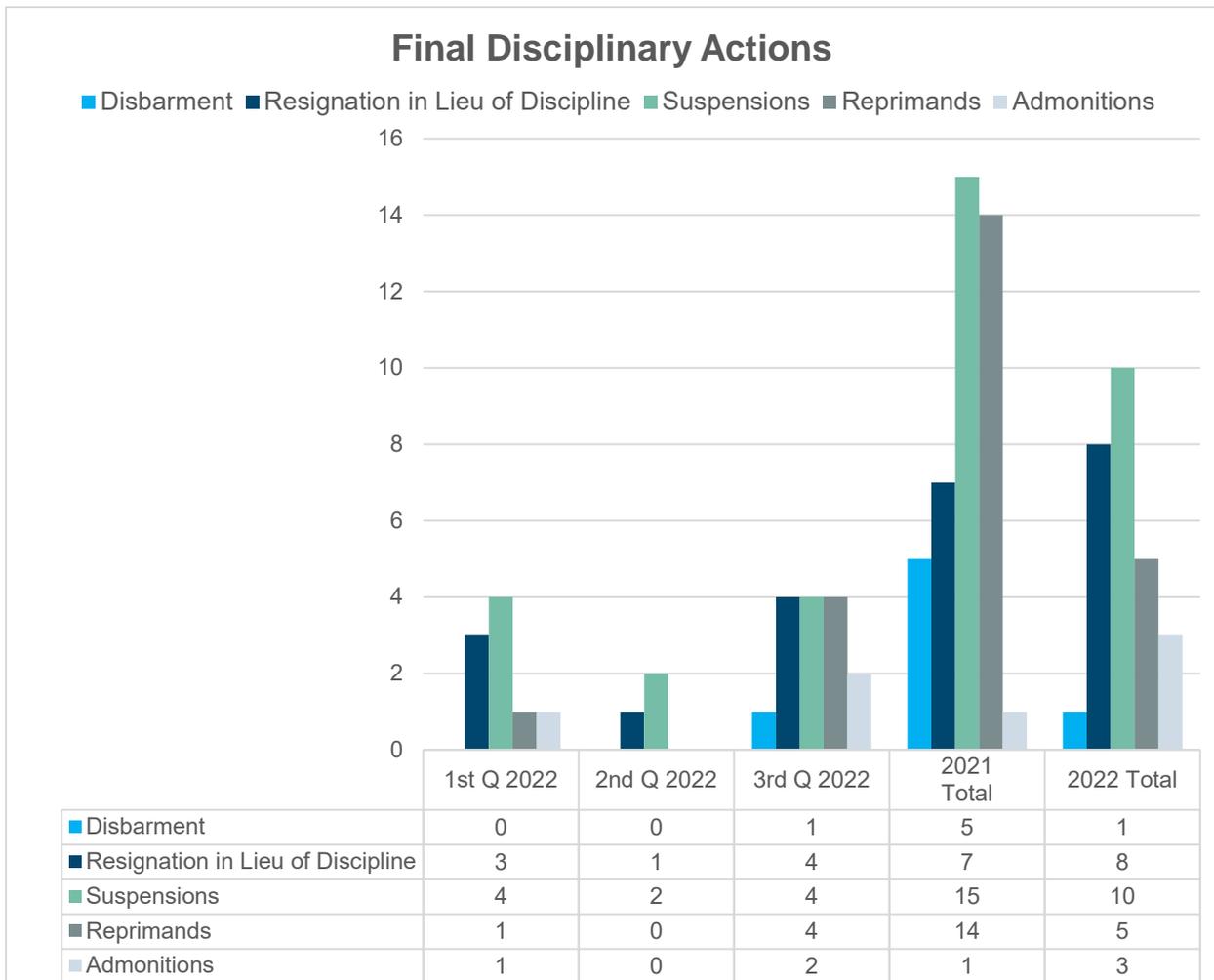
D. Pending Proceedings³

Open Proceedings	2021	2022
Ending 1 st Quarter	37	31
Ending 2 nd Quarter	38	41
Ending 3 rd Quarter	34	38
Ending 4 th Quarter	36	TBD



³ In the second table in this section, the Disciplinary Board numbers reflect Board orders on stipulations and following review after an appeal of a hearing officer’s findings.

E. Final Disciplinary Actions



F. Disability Found

Disability Found	Quarter Total
1 st Quarter	0
2 nd Quarter	1
3 rd Quarter	2
4 th Quarter	TBD
2022 Total	3
2021 Total	4

G. Discipline Costs⁴

Quarterly Discipline Costs Collected	Total
1st Quarter	\$25,415.10
2nd Quarter	\$22,106.13
3rd Quarter	\$10,961.01
4th Quarter	TBD
2022 Total	\$58,482.24
2021 Total	\$105,389.72

⁴ The cost figures may vary from amounts indicated in previous quarterly reports, statistical summaries, and annual reports, owing to limitations on the data available at the time of issuance of these quarterly reports and the final cost figures available after Accounting closes the monthly books.

WASHINGTON STATE BAR ASSOCIATION

Board of Governors

Brent Williams-Ruth, Governor District 8

TO: Chief Justice Gonzalez and Members of the Court
CC: Washington Bar Licensure Task Force
FROM: Brent Williams-Ruth, Task Force Co-Chair
DATE: July 6, 2022
RE: **Bar Licensure Task Force Progress Report**

Thank you for the opportunity to submit this progress report, as requested during our status conference on June 22, 2022. This report was drafted after consultation with the members of the Task Force at our regularly scheduled meeting on June 27, 2022.

The Charter provided by the Court, by Order No. 25700-B-649, includes seven specific deliverables, enumerated as a. through g.¹ The Task Force has divided our work into several subcommittees that have been exploring each of the enumerated issues surrounding bar licensure.² The subcommittees share their analyses with the Task Force for its fuller consideration. For instance, at our most recent meeting, we heard from the History of the Exam (Nationally and in Washington) Subcommittee.

The consensus of the Task Force is that we have successfully delved into the first five deliverables and are ready to draft our detailed findings for the Court's consideration. For some deliverables, we will note when data is provided from a national source because such data is not available from the WSBA or Washington Courts.

With respect to the sixth deliverable (f: *If possible, seek input from those where were admitted via 2020 diploma privilege regarding their preparedness for practice, as well as input from attorneys supervising them.*), the Task Force does not recommend doing a survey at this time. We fully considered this matter (noting the Court's helpful "if possible" formulation) and believe the survey would not generate helpful information. We will explain our analysis fully in our final report. Briefly, our concerns are that the survey would reinforce the presumption that the bar exam helps prepare a lawyer for the practice of law and our research raises serious validity claims about this very presumption. Further, the 2020 diploma privilege was granted due to exigent circumstances in the world, the United States, and Seattle. These were not individuals who went through a system designed with diploma privilege in mind. To evaluate the preparedness of diploma privilege graduates, we recommend examining the analysis of those educated with that objective.

As to the last—and perhaps most significant—deliverable (g.: *Make recommendations to the WSSC regarding the bar exam and licensing new attorneys in Washington state.*) the Task Force will be making recommendations to modify the licensure process. This includes recommended changes to the existing Character & Fitness process. The determination as to which of several possible pathways to licensure we will recommend will be the focus of our July 25 and August 22 meetings.

We anticipate the drafting of the final report and recommendation(s) will begin this summer and shall be delivered to the Court before the stated deadline (Dec. 31, 2022).

¹ A copy of the Charter accompanies this status report for ease of reference

² The subcommittees are Research & Data; Alternatives to Exam; Attorney Competency; Reciprocity; General Equity; NCBE Study; The History of the Exam; and Character & Fitness/Ethics



To: Washington State Bar Association Board of Governors
Washington State Bar Foundation Trustees

From: Richard Bird, Treasurer

Date: December 27, 2022

Re: Treasurer's Report, Year Ending September 30, 2022

Attached are the un-audited financial statements for the Washington State Bar Foundation (WSBF) for the fiscal year 2022. The WSBA provides staffing, office space and technical support to the Foundation in order for the Foundation to fulfill its mission to support WSBA programs that promote diversity within the legal profession and enhance the public's access to, and understanding of, the justice system. This support includes the time and expertise of WSBA's Controller, who keeps the Foundation's books.

WSBF Cash Fund Balances

For the WSBF Cash Fund balances as of September 30, 2022, please see the attached financial statement dated November 23, 2022.

Notes and Comments

The Foundation had \$505,975 in income during FY22, which was \$21,898 more (approximately 4.5% higher) than the prior year. A portion of this was an Access to Justice Conference sponsorship proceeds from FY21 that carried over into FY21. Additionally, the Foundation served as fiscal agent for a grant on behalf of the Access to Justice Board.

The Foundation's FY23¹ allocation of \$316,000 for WSBA programs held steady from the previous year – with \$265,000 paid directly to WSBA, and \$51,000 held back to pay FY23 Powerful Communities Project grantees, as well as community members with lived experience to serve on the grant selection panel. Indirect costs (staffing/operating costs provided by WSBA as in-kind support) totaled \$127,622, representing an increase of \$4,718 (<4%) from FY21, due primarily to WSBA organization-wide salary adjustments and the reception that the Foundation supported for the Board of Governors and members of the Spokane community in May 2022.

Despite the ongoing challenges and uncertainty of COVID, WSBA members were more generous than ever with gifts to WSBF during licensing, and many generous firms and individuals made gifts to the Foundation throughout the year.

Conclusion

In the twelve years since the first professional staff dedicated solely to the Foundation was hired, the Foundation has continued to seek operational efficiencies while expanding its support of WSBA programs. Its financial systems and policies appear appropriate to its current capacity; execution of and updates to the Fund Development and Disbursement and Fiscal Policies will continue to ensure that the Foundation fulfills its mission and that donor wishes are met.

¹ Funds raised in the previous year are disbursed to WSBA and WSBA grantees for the coming fiscal year.



Advancing WSBA's Vision of a Just Washington

To: Terra Nevitt
From: Maggie Yu, Controller
Re: Foundation Financial Statements as of September 30, 2022
Date: November 23, 2022

Attached are the financial statements for the Washington State Bar Foundation as of September 30, 2022.

**WSBF Fund Balances¹
As of September 30, 2022**

Fund Name	Cash	Committed Funds	Available Funds
ELUL Midyear Scholarship Fund	793	(793)	0
McMahon	8,352	0	8,352
ATJ-LFW Race Equity	40,000	0	40,000
Peter Greenfield Internship	1,911	0	1,911
Powerful Communities Project	8,594	0	8,594
WSBA Justice & Diversity Opportunities	1,000	0	1,000
ATJ/ATJ Conference	30,311	0	30,311
Unrestricted	<u>321,472</u>	<u>0</u>	<u>321,472</u>
Total Fund Balances	<u>\$412,434</u>	<u>(793)</u>	<u>\$412,434</u>

¹ Excludes fixed assets (\$14,400 in artwork).

WSBA Foundation
Statement of Activities (Profit & Loss)
 October 2021 through September 2022

	Oct '21 - Sep 22
Ordinary Income/Expense	
Income	
Contributions & Grants Income	
Corporate	4,060
Foundations & Nonprofits	40,819
Government	13,378
Individuals/Private Donors	237,980
Other	81,076
Contributions & Grants Income - Other	1,000
Total Contributions & Grants Income	378,313
In Kind Donations	
WSBA Staff Time	123,441
WSBA Expenses	4,221
Total In Kind Donations	127,662
Total Income	505,975
Expense	
Donor Database Expense	2,388
In Kind Expenses	
WSBA Staff Support	123,441
WSBA Expenses	4,221
Total In Kind Expenses	127,662
Insurance	1,846
Interest Expense	7
IRS Penalty	3,120
Meals & Entertainment	2,099
Miscellaneous	135
Program Expense	
Powerful Communities Project	50,000
WSBA Justice & Div. Opportunity	4,000
WSBA Funding	265,000
Access to Justice Projects	26,600
Total Program Expense	345,600
Total Expense	482,857
Net Ordinary Income	23,118
Other Income/Expense	
Other Income	
Interest Income	1,816
Other Income	3,995
Total Other Income	5,811
Other Expense	
Other Expenses	4,151
Total Other Expense	4,151
Net Other Income	1,660
Net Income	24,778

WSBA Foundation
Balance Sheet
As of September 30, 2022

	<u>Sep 30, 22</u>
ASSETS	
Current Assets	
Checking/Savings	
Wells Fargo Checking	18,281.76
Wells Fargo Heritage Money Mkt	394,155.26
Total Checking/Savings	<u>412,437.02</u>
Total Current Assets	412,437.02
Fixed Assets	
Artwork	14,400.00
Total Fixed Assets	<u>14,400.00</u>
TOTAL ASSETS	<u><u>426,837.02</u></u>
LIABILITIES & EQUITY	
Equity	
Increase/Decrease Fund Balance	402,058.81
Net Income	24,778.21
Total Equity	<u>426,837.02</u>
TOTAL LIABILITIES & EQUITY	<u><u>426,837.02</u></u>

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

Financial Reports

(Unaudited)

Year to Date November 30, 2022

Prepared by

Maggie Yu, Controller & Darshita Patel, Accountant

Submitted by

Tiffany Lynch, Director of Finance

January 06, 2022

WASHINGTON STATE BAR ASSOCIATION

To: Board of Governors
Budget and Audit Committee

From: Terra Nevitt, Executive Director; Tiffany Lynch, Director of Finance; Maggie Yu, Controller

Re: Key Financial Benchmarks for the Preliminary Fiscal Year to Date (YTD) through November 30, 2022
As % of Completion to Annual Budget

	% of Year	Current Year % YTD	Current Year \$ Difference Favorable/(Unfavorable)	Prior Year YTD	Comments
Total Salaries & Benefits	17%	15%	\$211,142	16%	Favorable due to timing of L & I payments and higher capital labor.
Other Indirect Expenses*	17%	16%	\$45,478	15%	Favorable due to timing of payments.
Total Indirect Expenses	17%	15%	\$256,620	16%	Favorable resulting from a combination of reasons described above.

General Fund Revenues	17%	17%	\$128,966	17%	On budget with slightly favorable variance from interest income, new member program seminar registrations and timing of collection for bar exam fees.
General Fund Indirect Expenses	17%	15%	\$238,382	16%	Favorable as described under indirect expenses above.
General Fund Direct Expenses	17%	8%	\$241,489	7%	Favorable to budget due to timing of program activities and meetings/events.
General Fund Net	17%	192%	\$608,836	539%	Favorable to budget for the reasons described above.

CLE Revenue	17%	16%	(\$16,878)	19%	Unfavorable to budget due to timing of scheduled seminars and product sales.
CLE Direct Expenses	17%	4%	\$47,509	3%	Favorable to budget due to scheduled timing of seminars and product sales.
CLE Indirect Expenses	17%	15%	\$16,624	16%	Favorable as described under indirect expenses above
CLE Net	17%	38%	\$47,255	66%	Favorable to budget for the reasons described above.

*Workplace benefits, Human Resources, meeting support, rent, taxes, furniture & maintenance, office supplies, depreciation, insurance, equipment, professional fees (legal & audit), internet & telephone, postage, storage, bank fees, Technology

Washington State Bar Association Financial Summary
Compared to Fiscal Year 2023 Budget
For the Period from November 1, 2022 to November 30, 2022

Category	Actual Revenues	Budgeted Revenues	Actual Indirect Expenses	Budgeted Indirect Expenses	Actual Direct Expenses	Budgeted Direct Expenses	Actual Total Expenses	Budgeted Total Expenses	Actual Net Result	Budgeted Net Result
Access to Justice	-	-	37,997	237,082	13,181	121,820	51,177	358,902	(51,177)	(358,902)
Admissions/Bar Exam	384,300	1,362,940	146,021	892,773	8,291	411,079	154,312	1,303,852	229,988	59,088
Advancement FTE	-	-	55,867	354,465	198	8,100	56,065	362,565	(56,065)	(362,565)
Bar News	93,499	602,700	53,103	332,507	71,489	363,460	124,592	695,967	(31,093)	(93,267)
Board of Governors	-	-	30,602	191,700	43,208	371,900	73,810	563,600	(73,810)	(563,600)
Character & Fitness Board	-	-	22,405	139,623	-	27,000	22,405	166,623	(22,405)	(166,623)
Communications Strategies	113	3,500	107,896	674,814	2,718	116,015	110,614	790,829	(110,501)	(787,329)
Communications Strategies FTE	-	-	39,501	243,400	-	-	39,501	243,400	(39,501)	(243,400)
Discipline	12,900	119,000	905,975	6,007,729	12,945	206,999	918,920	6,214,728	(906,020)	(6,095,728)
Diversity	-	135,000	33,872	373,692	5,670	121,535	39,542	495,227	(39,542)	(360,227)
Finance	71,471	26,000	151,131	1,080,720	396	13,500	151,527	1,094,220	(80,056)	(1,068,220)
Foundation	-	-	23,389	147,147	24	5,650	23,413	152,797	(23,413)	(152,797)
Human Resources	-	-	92,443	291,667	-	-	92,443	291,667	(92,443)	(291,667)
Law Clerk Program	1,033	188,200	21,228	138,099	1,110	8,900	22,338	146,999	(21,305)	41,201
Legislative	-	-	34,042	242,681	846	26,783	34,888	269,464	(34,888)	(269,464)
Legal Lunchbox	6,076	23,000	7,783	51,117	551	1,500	8,334	52,617	(2,258)	(29,617)
Licensing and Membership Records	59,828	452,200	100,011	622,311	4,808	19,651	104,819	641,962	(44,991)	(189,762)
Licensing Fees	2,748,922	17,053,467	-	-	-	-	0	-	2,748,922	17,053,467
Limited License Legal Technician	2,118	29,722	13,069	85,248	866	15,500	13,934	100,748	(11,816)	(71,026)
Limited Practice Officers	42,042	195,088	15,184	99,305	-	21,042	15,184	120,347	26,858	74,741
Mandatory CLE	180,225	1,125,250	131,150	714,329	2,275	67,015	133,425	781,344	46,800	343,906
Member Wellness Program	-	7,500	28,418	234,719	200	2,800	28,618	237,519	(28,618)	(230,019)
Member Services & Engagement	15,778	11,800	47,115	302,978	1,569	39,500	48,684	342,478	(32,906)	(330,678)
Mini CLE	-	-	18,053	114,412	-	-	18,053	114,412	(18,053)	(114,412)
New Member Education	66,151	85,000	14,977	95,269	-	1,600	14,977	96,869	51,174	(11,869)
Office of General Counsel	-	963	151,272	1,038,134	1,203	19,400	152,475	1,057,534	(152,475)	(1,056,571)
Office of the Executive Director	-	-	78,879	568,259	8,929	128,775	87,808	697,034	(87,808)	(697,034)
OGC-Disciplinary Board	-	-	34,755	217,139	13,250	112,000	48,005	329,139	(48,005)	(329,139)
Practice of Law Board	-	-	10,056	63,355	-	12,000	10,056	75,355	(10,056)	(75,355)
Practice Management Assistance	-	50,000	21,189	133,033	-	73,400	21,189	206,433	(21,189)	(156,433)
Professional Responsibility Program	-	-	36,551	151,321	267	2,250	36,818	153,571	(36,818)	(153,571)
Public Service Programs	-	130,000	34,756	219,329	457	266,928	35,213	486,257	(35,213)	(356,257)
Publication and Design Services	-	-	18,996	119,175	4,100	4,612	23,096	123,787	(23,096)	(123,787)
Regulatory Services FTE	-	-	73,860	536,908	-	23,550	73,860	560,458	(73,860)	(560,458)
Sections Administration	93,155	290,543	45,465	290,746	470	7,850	45,935	298,596	47,220	(8,053)
Service Center	-	-	112,011	703,381	612	10,300	112,623	713,681	(112,623)	(713,681)
Volunteer Engagement	-	-	15,605	97,639	590	17,850	16,195	115,489.27	(16,195)	(115,489)
Technology	-	-	297,460	1,996,602	-	-	297,460	1,996,602	(297,460)	(1,996,602)
Subtotal General Fund	3,777,611	21,891,872	3,062,087	19,802,808	200,222	2,650,264	3,262,309	22,453,072	515,303	(561,199)
Expenses using reserve funds									-	-
Total General Fund - Net Result from Operations									515,303	(561,199)
Percentage of Budget	17%		15%		8%		15%			
CLE-Seminars and Products	281,594	1,653,725	164,994	1,079,536	15,082	307,219	180,076	1,386,755	101,518	266,970
CLE - Deskbooks	17,316	241,000	35,373	222,410	-	68,325	35,373	290,735	(18,057)	(49,735)
Total CLE	298,910	1,894,725	200,367	1,301,946	15,082	375,544	215,449	1,677,490	83,461	217,235
Percentage of Budget	16%		15%		4%		13%			
Total All Sections	145,665	649,695	-	-	118,787	904,646	118,787	904,646	26,878	(254,951)
Client Protection Fund-Restricted	125,301	730,000	28,705	181,912	470	502,300	29,174	684,212	96,126	45,788
Totals	4,347,488	25,166,292	3,291,158	21,286,666	334,560	4,432,754	3,625,719	25,719,419	721,769	(553,127)
Percentage of Budget	17%		15%		8%		14%			

Summary of Fund Balances:	Fund Balances Sept. 30, 2022	2023 Budgeted Fund Balances	Fund Balances Year to date
Restricted Funds:			
Client Protection Fund	4,063,501	4,109,289	4,159,628
Board-Designated Funds (Non-General Fund):			
CLE Fund Balance	1,042,049	1,259,284	1,125,510
Section Funds	1,802,650	1,547,699	1,829,528
Board-Designated Funds (General Fund):			
Operating Reserve Fund	2,000,000	2,000,000	2,000,000
Facilities Reserve Fund	1,000,000	1,000,000	1,000,000
Unrestricted Funds (General Fund):			
Unrestricted General Fund	5,713,268	5,152,068	6,228,570
Total General Fund Balance	8,713,268	8,152,068	9,228,570
Net Change in Total General Fund Balance		(561,199)	515,303
Total Fund Balance	15,621,468	15,068,341	16,343,237
Net Change In Fund Balance		(553,127)	721,769

Washington State Bar Association

Statement of Activities

For the Period from November 1, 2022 to November 30, 2022

17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LICENSE FEES						
REVENUE:						
LICENSE FEES	17,053,467	1,352,154	2,748,922	14,304,545	16%	93,323
TOTAL REVENUE:	<u>17,053,467</u>	<u>1,352,154</u>	<u>2,748,922</u>	<u>14,304,545</u>	<u>16%</u>	<u>(93,323)</u>

Washington State Bar Association
Statement of Activities
For the Period from November 1, 2022 to November 30, 2022
17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ACCESS TO JUSTICE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
SURVEYS	100	-	-	100	0%	17
ATJ BOARD RETREAT	2,000	268	2,130	(130)	107%	(1,797)
LEADERSHIP TRAINING	2,000	-	-	2,000	0%	333
ATJ BOARD EXPENSE	78,400	-	11,000	67,400	14%	2,067
STAFF TRAVEL/PARKING	3,000	31	50	2,950	2%	450
STAFF CONFERENCE & TRAINING	1,675	-	-	1,675	0%	279
PUBLIC DEFENSE	4,000	-	-	4,000	0%	667
CONFERENCE/INSTITUTE EXPENSE	23,145	-	-	23,145	0%	3,858
RECEPTION/FORUM EXPENSE	7,500	-	-	7,500	0%	1,250
TOTAL DIRECT EXPENSES:	121,820	299	13,181	108,639	11%	7,123
INDIRECT EXPENSES:						
SALARY EXPENSE (1.64 FTE)	138,139	11,463	22,925	115,214	17%	98
BENEFITS EXPENSE	48,192	3,562	7,130	41,062	15%	902
OTHER INDIRECT EXPENSE	50,751	3,213	7,942	42,809	16%	517
TOTAL INDIRECT EXPENSES:	237,082	18,237	37,997	199,085	16%	1,517
TOTAL ALL EXPENSES:	358,902	18,536	51,177	307,724	14%	8,640
NET INCOME (LOSS):	(358,902)	(18,536)	(51,177)	(307,724)	14%	8,640

Washington State Bar Association
Statement of Activities
For the Period from November 1, 2022 to November 30, 2022
17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ADMISSIONS						
REVENUE:						
EXAM SOFT REVENUE	27,000	-	-	27,000	0%	(4,500)
BAR EXAM FEES	1,253,000	118,970	377,780	875,220	30%	168,947
RULE 9/LEGAL INTERN FEES	12,000	300	800	11,200	7%	(1,200)
SPECIAL ADMISSIONS	70,940	2,995	5,720	65,220	8%	(6,103)
TOTAL REVENUE:	1,362,940	122,265	384,300	978,640	28%	157,143
DIRECT EXPENSES:						
POSTAGE	750	203	203	547	27%	(78)
STAFF TRAVEL/PARKING	23,000	-	-	23,000	0%	3,833
STAFF MEMBERSHIP DUES	600	-	150	450	25%	(50)
SUPPLIES	2,750	-	-	2,750	0%	458
FACILITY, PARKING, FOOD	101,000	-	-	101,000	0%	16,833
EXAMINER FEES	36,000	500	2,500	33,500	7%	3,500
UBE EXMINATIONS	123,000	-	-	123,000	0%	20,500
BOARD OF BAR EXAMINERS	18,850	-	-	18,850	0%	3,142
BAR EXAM PROCTORS	39,000	-	-	39,000	0%	6,500
DISABILITY ACCOMMODATIONS	27,000	-	-	27,000	0%	4,500
CHARACTER & FITNESS INVESTIGATIONS	2,000	-	-	2,000	0%	333
LAW SCHOOL VISITS	1,700	-	206	1,494	12%	78
DEPRECIATION-SOFTWARE	24,929	2,037	4,075	20,854	16%	80
STAFF CONFERENCE & TRAINING	10,500	1,157	1,157	9,343	11%	593
TOTAL DIRECT EXPENSES:	411,079	3,897	8,291	402,788	2%	60,222
INDIRECT EXPENSES:						
SALARY EXPENSE (6.75 FTE)	512,745	41,901	83,802	428,943	16%	1,655
BENEFITS EXPENSE	171,146	14,783	29,576	141,570	17%	(1,052)
OTHER INDIRECT EXPENSE	208,882	13,159	32,643	176,239	16%	2,171
TOTAL INDIRECT EXPENSES:	892,773	69,843	146,021	746,752	16%	2,775
TOTAL ALL EXPENSES:	1,303,852	73,740	154,312	1,149,541	12%	62,997
NET INCOME (LOSS):	59,088	48,525	229,988	(170,901)	389%	220,140

Washington State Bar Association

Statement of Activities

For the Period from November 1, 2022 to November 30, 2022

17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ADVANCEMENT FTE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF CONFERENCE & TRAINING	8,100	-	198	7,902	2%	1,152
TOTAL DIRECT EXPENSES:	8,100	-	198	7,902	2%	1,152
INDIRECT EXPENSES:						
SALARY EXPENSE (1.88 FTE)	233,777	18,877	37,332	196,444	16%	1,630
BENEFITS EXPENSE	62,511	4,740	9,472	53,039	15%	947
OTHER INDIRECT EXPENSE	58,178	3,642	9,063	49,115	16%	634
TOTAL INDIRECT EXPENSES:	354,465	27,259	55,867	298,599	16%	3,211
TOTAL ALL EXPENSES:	362,565	27,259	56,065	306,501	15%	4,363
NET INCOME (LOSS):	(362,565)	(27,259)	(56,065)	(306,501)	15%	4,363

Washington State Bar Association

Statement of Activities

For the Period from November 1, 2022 to November 30, 2022

17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
BAR NEWS						
REVENUE:						
DISPLAY ADVERTISING	400,000	42,000	84,000	316,000	21%	17,333
SUBSCRIPT/SINGLE ISSUES	200	-	-	200	0%	(33)
CLASSIFIED ADVERTISING	2,500	1,602	2,787	(287)	111%	2,370
JOB TARGET ADVERTISING	200,000	6,712	6,712	193,288	3%	(26,622)
TOTAL REVENUE:	602,700	50,314	93,499	509,201	16%	(6,951)
DIRECT EXPENSES:						
POSTAGE	110,000	11,924	22,839	87,161	21%	(4,506)
PRINTING, COPYING & MAILING	250,000	24,590	48,650	201,350	19%	(6,983)
DIGITAL/ONLINE DEVELOPMENT	1,000	-	-	1,000	0%	167
GRAPHICS/ARTWORK	100	-	-	100	0%	17
STAFF CONFERENCE & TRAINING	2,000	-	-	2,000	0%	333
STAFF MEMBERSHIP DUES	135	-	-	135	0%	23
SUBSCRIPTIONS	225	-	-	225	0%	38
TOTAL DIRECT EXPENSES:	363,460	36,513	71,489	291,971	20%	(10,913)
INDIRECT EXPENSES:						
SALARY EXPENSE (2.23 FTE)	209,396	17,106	34,212	175,184	16%	687
BENEFITS EXPENSE	54,103	4,063	8,101	46,002	15%	916
OTHER INDIRECT EXPENSE	69,008	4,350	10,790	58,219	16%	712
TOTAL INDIRECT EXPENSES:	332,507	25,518	53,103	279,404	16%	2,315
TOTAL ALL EXPENSES:	695,967	62,032	124,592	571,375	18%	(8,598)
NET INCOME (LOSS):	(93,267)	(11,718)	(31,093)	(62,174)	33%	(15,549)

Washington State Bar Association
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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
BOARD OF GOVERNORS						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
BOG MEETINGS	205,000	22,076	22,150	182,850	11%	12,017
BOG COMMITTEES' EXPENSES	7,000	-	-	7,000	0%	1,167
BOG RETREAT	50,000	12,947	12,947	37,053	26%	(4,614)
BOG CONFERENCE ATTENDANCE	43,000	-	-	43,000	0%	7,167
BOG TRAVEL & OUTREACH	10,000	642	4,893	5,107	49%	(3,226)
LEADERSHIP TRAINING	20,000	-	-	20,000	0%	3,333
BOG ELECTIONS	26,900	-	-	26,900	0%	4,483
PRESIDENT'S DINNER	10,000	-	-	10,000	0%	1,667
CONSULTING SERVICES	-	829	3,218	(3,218)		(3,218)
TOTAL DIRECT EXPENSES:	371,900	36,493	43,208	328,692	12%	18,776
INDIRECT EXPENSES:						
SALARY EXPENSE (1.40 FTE)	112,271	9,279	18,559	93,712	17%	153
BENEFITS EXPENSE	36,105	2,643	5,283	30,823	15%	735
OTHER INDIRECT EXPENSE	43,324	2,725	6,761	36,563	16%	460
TOTAL INDIRECT EXPENSES:	191,700	14,648	30,602	161,098	16%	1,348
TOTAL ALL EXPENSES:	563,600	51,141	73,810	489,790	13%	20,124
NET INCOME (LOSS):	(563,600)	(51,141)	(73,810)	(489,790)	13%	20,124

Washington State Bar Association

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CHARACTER & FITNESS BOARD						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CHARACTER & FITNESS BOARD EXP	12,000	-	-	12,000	0%	2,000
COURT REPORTERS	15,000	-	-	15,000	0%	2,500
TOTAL DIRECT EXPENSES:	27,000	-	-	27,000	0%	4,500
INDIRECT EXPENSES:						
SALARY EXPENSE (0.75 FTE)	90,551	7,462	14,924	75,626	16%	167
BENEFITS EXPENSE	25,863	1,907	3,815	22,048	15%	496
OTHER INDIRECT EXPENSE	23,209	1,504	3,666	19,544	16%	203
TOTAL INDIRECT EXPENSES:	139,623	10,873	22,405	117,218	16%	866
TOTAL ALL EXPENSES:	166,623	10,873	22,405	144,218	13%	5,366
NET INCOME (LOSS):	(166,623)	(10,873)	(22,405)	(144,218)	13%	5,366

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	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LAW CLERK PROGRAM						
REVENUE:						
LAW CLERK FEES	185,000	(167)	833	184,167	0%	(30,000)
LAW CLERK APPLICATION FEES	3,200	300	200	3,000	6%	(333)
TOTAL REVENUE:	188,200	133	1,033	187,167	1%	(30,333)
DIRECT EXPENSES:						
SUBSCRIPTIONS	250	-	-	250	0%	42
CHARACTER & FITNESS INVESTIGATIONS	100	-	-	100	0%	17
LAW CLERK BOARD EXPENSE	8,000	-	1,110	6,890	14%	223
LAW CLERK OUTREACH	550	-	-	550	0%	92
TOTAL DIRECT EXPENSES:	8,900	-	1,110	7,790	12%	373
INDIRECT EXPENSES:						
SALARY EXPENSE (0.98 FTE)	82,442	6,418	12,835	69,606	16%	905
BENEFITS EXPENSE	25,330	1,842	3,680	21,650	15%	541
OTHER INDIRECT EXPENSE	30,327	1,900	4,712	25,615	16%	342
TOTAL INDIRECT EXPENSES:	138,099	10,159	21,228	116,871	15%	1,789
TOTAL ALL EXPENSES:	146,999	10,159	22,338	124,661	15%	2,162
NET INCOME (LOSS):	41,201	(10,026)	(21,305)	62,506	-52%	(28,172)

Washington State Bar Association

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	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CLE - PRODUCTS						
REVENUE:						
SHIPPING & HANDLING	100	27	36	64	36%	19
COURSEBOOK SALES	7,000	305	375	6,625	5%	(792)
MP3 AND VIDEO SALES	910,000	108,516	166,160	743,840	18%	14,493
TOTAL REVENUE:	917,100	108,848	166,571	750,529	18%	13,721
DIRECT EXPENSES:						
DEPRECIATION	1,309	279	558	751	43%	(340)
STAFF MEMBERSHIP DUES	200	-	-	200	0%	33
COST OF SALES - COURSEBOOKS	690	30	33	657	5%	82
A/V DEVELOP COSTS (RECORDING)	1,250	-	-	1,250	0%	208
ONLINE PRODUCT HOSTING EXPENSES	53,000	3,956	6,396	46,604	12%	2,437
POSTAGE & DELIVERY-COURSEBOOKS	-	20	20	(20)		(20)
DISABILITY ACCOMMODATIONS	2,000	-	-	2,000	0%	333
STAFF CONFERENCE & TRAINING	300	-	-	300	0%	50
TOTAL DIRECT EXPENSES:	58,749	4,285	7,008	51,741	12%	2,784
INDIRECT EXPENSES:						
SALARY EXPENSE (1.30 FTE)	93,769	4,835	9,252	84,517	10%	6,376
BENEFITS EXPENSE	36,718	2,676	5,360	31,359	15%	760
OTHER INDIRECT EXPENSE	41,778	2,488	6,237	35,541	15%	726
TOTAL INDIRECT EXPENSES:	172,265	10,000	20,849	151,417	12%	7,862
TOTAL ALL EXPENSES:	231,014	14,284	27,857	203,158	12%	10,646
NET INCOME (LOSS):	686,086	94,563	138,714	547,372	20%	24,366

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CLE - SEMINARS						
REVENUE:						
SEMINAR REGISTRATIONS	850,000	91,511	115,024	734,976	14%	(26,643)
SEMINAR-EXHIB/SPNSR/ETC	20,000	-	-	20,000	0%	(3,333)
SEMINAR SPLITS W/ CLE	(133,375)	-	-	(133,375)	0%	22,229
TOTAL REVENUE:	736,625	91,511	115,024	621,601	16%	(7,747)
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	15,000	-	-	15,000	0%	2,500
STAFF MEMBERSHIP DUES	1,500	-	-	1,500	0%	250
COURSEBOOK PRODUCTION	1,000	-	-	1,000	0%	167
POSTAGE - FLIERS/CATALOGS	5,000	-	-	5,000	0%	833
ACCREDITATION FEES	3,000	(48)	(84)	3,084	-3%	584
SEMINAR BROCHURES	20,000	-	-	20,000	0%	3,333
FACILITIES	165,200	4,205	8,105	157,095	5%	19,428
SPEAKERS & PROGRAM DEVELOP	32,000	53	53	31,947	0%	5,280
HONORARIA	1,200	-	-	1,200	0%	200
CLE SEMINAR COMMITTEE	200	-	-	200	0%	33
DISABILITY ACCOMODATIONS	2,000	-	-	2,000	0%	333
STAFF CONFERENCE & TRAINING	2,370	-	-	2,370	0%	395
TOTAL DIRECT EXPENSES:	248,470	4,210	8,074	240,396	3%	33,338
INDIRECT EXPENSES:						
SALARY EXPENSE (6.83 FTE)	502,652	42,426	83,624	419,028	17%	151
BENEFITS EXPENSE	183,351	13,723	27,469	155,882	15%	3,089
OTHER INDIRECT EXPENSE	221,267	13,324	33,052	188,215	15%	3,825
TOTAL INDIRECT EXPENSES:	907,270	69,474	144,146	763,125	16%	7,066
TOTAL ALL EXPENSES:	1,155,740	73,684	152,219	1,003,521	13%	40,404
NET INCOME (LOSS):	(419,115)	17,827	(37,196)	(381,919)	9%	32,657

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	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CONTINUING LEGAL EDUCATION (CLE)						
REVENUE:						
SEMINAR REGISTRATIONS	850,000	91,511	115,024	734,976	14%	(26,643)
SEMINAR REVENUE-OTHER	20,000	-	-	20,000	0%	(3,333)
SEMINAR SPLITS W/ CLE	(133,375)	-	-	(133,375)	0%	22,229
SHIPPING & HANDLING	100	27	36	64	36%	19
COURSEBOOK SALES	7,000	305	375	6,625	5%	(792)
MP3 AND VIDEO SALES	910,000	108,516	166,160	743,840	18%	14,493
TOTAL REVENUE:	1,653,725	200,359	281,594	1,372,131	17%	(7,747)
DIRECT EXPENSES:						
COURSEBOOK PRODUCTION	1,000	-	-	1,000	0%	167
POSTAGE - FLIERS/CATALOGS	5,000	-	-	5,000	0%	833
DEPRECIATION	1,309	279	558	751	43%	(340)
ONLINE EXPENSES	53,000	3,956	6,396	46,604	12%	2,437
ACCREDITATION FEES	3,000	(48)	(84)	3,084	-3%	584
SEMINAR BROCHURES	20,000	-	-	20,000	0%	3,333
FACILITIES	165,200	4,205	8,105	157,095	5%	19,428
DISABILITY ACCOMMODATIONS	4,000	-	-	4,000	0%	667
SPEAKERS & PROGRAM DEVELOP	32,000	53	53	31,947	0%	5,280
HONORARIA	1,200	-	-	1,200	0%	200
CLE SEMINAR COMMITTEE	200	-	-	200	0%	33
STAFF TRAVEL/PARKING	15,000	-	-	15,000	0%	2,500
STAFF CONFERENCE & TRAINING	2,370	-	-	2,370	0%	395
STAFF MEMBERSHIP DUES	1,700	-	-	1,700	0%	283
COST OF SALES - COURSEBOOKS	690	30	33	657	5%	82
A/V DEVELOP COSTS (RECORDING)	1,250	-	-	1,250	0%	208
POSTAGE & DELIVERY-COURSEBOOKS	-	20	20	(20)	-	(20)
STAFF TRAVEL/PARKING	300	-	-	300	0%	50
TOTAL DIRECT EXPENSES:	307,219	8,495	15,082	292,137	5%	36,121
INDIRECT EXPENSES:						
SALARY EXPENSE (8.13 FTE)	596,422	47,262	92,877	503,545	16%	6,527
BENEFITS EXPENSE	220,069	16,399	32,829	187,240	15%	3,849
OTHER INDIRECT EXPENSE	263,045	15,812	39,289	223,756	15%	4,552
TOTAL INDIRECT EXPENSES:	1,079,536	79,473	164,994	914,541	15%	14,928
TOTAL ALL EXPENSES:	1,386,755	87,968	180,076	1,206,679	13%	51,050
NET INCOME (LOSS):	266,970	112,391	101,518	165,452	38%	57,023

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	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
COMMUNICATION STRATEGIES FTE						
INDIRECT EXPENSES:						
SALARY EXPENSE (1.00 FTE)	168,213	13,983	27,965	140,248	17%	71
BENEFITS EXPENSE	44,241	3,343	6,688	37,553	15%	686
OTHER INDIRECT EXPENSE	30,946	1,955	4,849	26,097	16%	309
TOTAL INDIRECT EXPENSES:	<u>243,400</u>	<u>19,280</u>	<u>39,501</u>	<u>203,899</u>	<u>16%</u>	<u>1,065</u>
NET INCOME (LOSS):	<u>(243,400)</u>	<u>(19,280)</u>	<u>(39,501)</u>	<u>(203,899)</u>	<u>16%</u>	<u>1,065</u>

Washington State Bar Association

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
COMMUNICATION STRATEGIES						
REVENUE:						
SPONSORSHIPS	1,000	-	-	1,000	0%	(167)
WSBA LOGO MERCHANDISE SALES	2,500	-	113	2,387	5%	(303)
TOTAL REVENUE:	3,500	-	113	3,387	3%	(470)
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,395	198	396	2,999	12%	170
STAFF MEMBERSHIP DUES	1,120	-	-	1,120	0%	187
SUBSCRIPTIONS	4,000	139	278	3,722	7%	389
APEX DINNER	47,000	-	-	47,000	0%	7,833
50 YEAR MEMBER TRIBUTE LUNCH	20,000	-	-	20,000	0%	3,333
BAR OUTREACH	18,000	-	-	18,000	0%	3,000
COMMUNICATIONS OUTREACH	15,000	227	227	14,773	2%	2,273
STAFF CONFERENCE & TRAINING	7,500	1,817	1,817	5,683	24%	(567)
TOTAL DIRECT EXPENSES:	116,015	2,381	2,718	113,297	2%	16,618
INDIRECT EXPENSES:						
SALARY EXPENSE (5.20 FTE)	387,612	31,891	63,781	323,831	16%	821
BENEFITS EXPENSE	126,285	9,465	18,916	107,369	15%	2,131
OTHER INDIRECT EXPENSE	160,917	10,158	25,199	135,718	16%	1,620
TOTAL INDIRECT EXPENSES:	674,814	51,514	107,896	566,918	16%	4,573
TOTAL ALL EXPENSES:	790,829	53,895	110,614	680,215	14%	21,191
NET INCOME (LOSS):	(787,329)	(53,895)	(110,501)	(676,828)	14%	20,721

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CLIENT PROTECTION FUND						
REVENUE:						
CPF RESTITUTION	40,000	544	1,355	38,645	3%	(5,312)
CPF MEMBER ASSESSMENTS	690,000	91,080	96,960	593,040	14%	(18,040)
INTEREST INCOME	-	16,070	26,986	(26,986)		26,986
TOTAL REVENUE:	730,000	107,694	125,301	604,699	17%	3,634
DIRECT EXPENSES:						
BANK FEES - WELLS FARGO	2,100	190	379	1,721	18%	(29)
GIFTS TO INJURED CLIENTS	500,000	-	-	500,000	0%	83,333
CPF BOARD EXPENSES	-	90	90	(90)		(90)
STAFF MEMBERSHIP DUES	200	-	-	200	0%	33
TOTAL DIRECT EXPENSES:	502,300	280	470	501,830	0%	83,247
INDIRECT EXPENSES:						
SALARY EXPENSE (1.23 FTE)	104,797	8,667	17,334	87,464	17%	133
BENEFITS EXPENSE	37,207	2,712	5,430	31,778	15%	772
OTHER INDIRECT EXPENSE	39,907	2,395	5,941	33,966	15%	710
TOTAL INDIRECT EXPENSES:	181,912	13,774	28,705	153,207	16%	1,614
TOTAL ALL EXPENSES:	684,212	14,053	29,174	655,038	4%	84,861
NET INCOME (LOSS):	45,788	93,640	96,126	(50,339)	210%	88,495

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DESKBOOKS						
REVENUE:						
DESKBOOK SALES	150,000	6,456	6,456	143,544	4%	(18,544)
LEXIS/NEXIS ROYALTIES	35,000	3,803	3,803	31,197	11%	(2,031)
SECTION PUBLICATION SALES	6,000	495	495	5,505	8%	(505)
CASEMAKER ROYALTIES	50,000	6,563	6,563	43,438	13%	(1,771)
TOTAL REVENUE:	241,000	17,316	17,316	223,684	7%	(22,851)
DIRECT EXPENSES:						
COST OF SALES - DESKBOOKS	65,000	-	-	65,000	0%	10,833
COST OF SALES - SECTION PUBLICATION	1,500	-	-	1,500	0%	250
SPLITS TO SECTIONS	300	-	-	300	0%	50
DESKBOOK ROYALTIES	300	-	-	300	0%	50
STAFF CONFRENCES & TRAINING	1,000	-	-	1,000	0%	167
STAFF MEMBERSHIP DUES	225	-	-	225	0%	38
TOTAL DIRECT EXPENSES:	68,325	-	-	68,325	0%	11,388
INDIRECT EXPENSES:						
SALARY EXPENSE (1.50 FTE)	132,287	10,971	21,942	110,346	17%	106
BENEFITS EXPENSE	41,948	3,097	6,193	35,755	15%	799
OTHER INDIRECT EXPENSE	48,175	2,918	7,239	40,937	15%	790
TOTAL INDIRECT EXPENSES:	222,410	16,986	35,373	187,037	16%	1,695
TOTAL ALL EXPENSES:	290,735	16,986	35,373	255,362	12%	13,083
NET INCOME (LOSS):	(49,735)	330	(18,057)	(31,678)	36%	(9,768)

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	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DISCIPLINE						
REVENUE:						
AUDIT REVENUE	1,000	170	361	639	36%	195
RECOVERY OF DISCIPLINE COSTS	100,000	2,380	9,419	90,581	9%	(7,247)
DISCIPLINE HISTORY SUMMARY	18,000	1,469	3,119	14,881	17%	119
TOTAL REVENUE:	119,000	4,019	12,900	106,100	11%	(6,934)
DIRECT EXPENSES:						
DEPRECIATION-SOFTWARE	45,835	-	-	45,835	0%	7,639
PUBLICATIONS PRODUCTION	200	-	169	31	84%	(136)
STAFF TRAVEL/PARKING	20,000	594	1,206	18,794	6%	2,127
STAFF MEMBERSHIP DUES	7,610	250	750	6,860	10%	518
TELEPHONE	2,359	315	630	1,729	27%	(237)
COURT REPORTERS	60,000	6,396	6,891	53,109	11%	3,109
OUTSIDE COUNSEL/AIC	1,500	-	-	1,500	0%	250
LITIGATION EXPENSES	25,000	1,260	1,787	23,213	7%	2,380
DISABILITY EXPENSES	9,000	-	-	9,000	0%	1,500
TRANSLATION SERVICES	1,200	-	-	1,200	0%	200
STAFF CONFERENCE & TRAINING	33,295	984	1,512	31,783	5%	4,038
PRACTICE MONITOR EXPENSE	1,000	-	-	1,000	0%	167
TOTAL DIRECT EXPENSES:	206,999	9,799	12,945	194,054	6%	21,555
INDIRECT EXPENSES:						
SALARY EXPENSE (37.80 FTE)	3,764,781	278,505	559,238	3,205,543	15%	68,226
BENEFITS EXPENSE	1,073,208	81,961	163,788	909,420	15%	15,080
OTHER INDIRECT EXPENSE	1,169,740	73,751	182,949	986,791	16%	12,007
TOTAL INDIRECT EXPENSES:	6,007,729	434,217	905,975	5,101,754	15%	95,313
TOTAL ALL EXPENSES:	6,214,728	444,016	918,920	5,295,808	15%	116,868
NET INCOME (LOSS):	(6,095,728)	(439,997)	(906,020)	(5,189,707)	15%	109,934

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	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DIVERSITY						
REVENUE:						
DONATIONS	135,000	-	-	135,000	0%	(22,500)
TOTAL REVENUE:	135,000	-	-	135,000	0%	(22,500)
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	2,000	-	-	2,000	0%	333
STAFF MEMBERSHIP DUES	360	-	90	270	25%	(30)
COMMITTEE FOR DIVERSITY	3,800	-	-	3,800	0%	633
DIVERSITY EVENTS & PROJECTS	39,250	-	80	39,170	0%	6,462
SURVEYS	16,500	-	-	16,500	0%	2,750
STAFF CONFERENCE & TRAINING	5,000	-	100	4,900	2%	733
CONSULTING SERVICES	54,625	5,400	5,400	49,225	10%	3,704
TOTAL DIRECT EXPENSE:	121,535	5,400	5,670	115,865	5%	14,586
INDIRECT EXPENSES:						
SALARY EXPENSE (2.69 FTE)	222,707	5,365	10,730	211,977	5%	26,388
BENEFITS EXPENSE	67,741	5,055	10,098	57,643	15%	1,192
OTHER INDIRECT EXPENSE	83,243	5,258	13,043	70,200	16%	830
TOTAL INDIRECT EXPENSES:	373,692	15,678	33,872	339,820	9%	28,410
TOTAL ALL EXPENSES:	495,227	21,078	39,542	455,685	8%	42,996
NET INCOME (LOSS):	(360,227)	(21,078)	(39,542)	(320,685)	11%	20,496

Washington State Bar Association

Statement of Activities

For the Period from November 1, 2022 to November 30, 2022

17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
FINANCE						
(Previously ADMINISTRATION cost center)						
REVENUE:						
INTEREST INCOME	26,000	38,539	71,471	(45,471)	275%	67,137
TOTAL REVENUE:	26,000	38,539	71,471	(45,471)	275%	67,137
DIRECT EXPENSES:						
CONSULTING SERVICES	10,000	-	-	10,000	0%	1,667
STAFF TRAVEL/PARKING	3,000	36	36	2,964	1%	464
STAFF CONFERENCE & TRAINING	500	-	-	500	0%	83
MISCELLANEOUS	-	-	360	(360)		(360)
TOTAL DIRECT EXPENSES:	13,500	36	396	13,104	3%	1,854
INDIRECT EXPENSES:						
SALARY EXPENSE (6.92 FTE)	661,642	43,504	86,518	575,125	13%	23,756
BENEFITS EXPENSE	205,235	15,498	31,014	174,220	15%	3,191
OTHER INDIRECT EXPENSE	213,844	13,544	33,599	180,245	16%	2,042
TOTAL INDIRECT EXPENSES:	1,080,720	72,546	151,131	929,590	14%	28,989
TOTAL ALL EXPENSES:	1,094,220	72,582	151,527	942,694	14%	30,843
NET INCOME (LOSS):	(1,068,220)	(34,042)	(80,056)	(988,164)	7%	97,981

Washington State Bar Association

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
FOUNDATION						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	3,000	-	-	3,000	0%	500
PRINTING & COPYING	450	-	-	450	0%	75
STAFF TRAVEL/PARKING	700	-	-	700	0%	117
SUPPLIES	150	-	24	126	16%	1
BOARD OF TRUSTEES	750	-	-	750	0%	125
POSTAGE	300	-	-	300	0%	50
STAFF CONFERENCE & TRAINING	300	-	-	300	0%	50
TOTAL DIRECT EXPENSES:	5,650	-	24	5,626	0%	918
INDIRECT EXPENSES:						
SALARY EXPENSE (1.05 FTE)	96,359	7,846	15,692	80,667	16%	368
BENEFITS EXPENSE	18,295	1,335	2,643	15,652	14%	406
OTHER INDIRECT EXPENSE	32,493	2,037	5,053	27,439	16%	362
TOTAL INDIRECT EXPENSES:	147,147	11,218	23,389	123,759	16%	1,136
TOTAL ALL EXPENSES:	152,797	11,218	23,413	129,385	15%	2,054
NET INCOME (LOSS):	(152,797)	(11,218)	(23,413)	(129,385)	15%	2,054

Washington State Bar Association

Statement of Activities

For the Period from November 1, 2022 to November 30, 2022

17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
HUMAN RESOURCES						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	700	-	-	700	0%	117
STAFF MEMBERSHIP DUES	800	-	-	800	0%	133
SUBSCRIPTIONS	500	-	229	271	46%	(146)
STAFF TRAINING- GENERAL	15,000	-	-	15,000	0%	2,500
RECRUITING AND ADVERTISING	6,600	282	794	5,806	12%	306
PAYROLL PROCESSING	50,000	3,618	7,188	42,812	14%	1,145
SALARY SURVEYS	1,500	-	-	1,500	0%	250
CONSULTING SERVICES	2,000	-	-	2,000	0%	333
TRANSFER TO INDIRECT EXPENSE	(77,100)	(3,901)	(8,211)	(68,889)	11%	(4,639)
TOTAL DIRECT EXPENSES:	-	-	-	-		-
INDIRECT EXPENSES:						
SALARY EXPENSE (3.00 FTE)	302,788	31,033	63,430	239,357	21%	(12,966)
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(33,333)
BENEFITS EXPENSE	96,043	7,229	14,467	81,576	15%	1,540
OTHER INDIRECT EXPENSE	92,837	5,864	14,546	78,291	16%	927
TOTAL INDIRECT EXPENSES:	291,667	44,126	92,443	199,224	32%	(43,832)
TOTAL ALL EXPENSES:	291,667	44,126	92,443	199,224	32%	(43,832)
NET INCOME (LOSS):	(291,667)	(44,126)	(92,443)	(199,224)	32%	(43,832)

Washington State Bar Association

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LEGISLATIVE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,133	-	-	3,133	0%	522
STAFF MEMBERSHIP DUES	450	-	-	450	0%	75
JUD RECOMMEND COMMITTEE	2,250	-	-	2,250	0%	375
SUBSCRIPTIONS	2,000	-	-	2,000	0%	333
TELEPHONE	-	47	95	(95)		(95)
CONTRACT LOBBYIST	15,000	-	-	15,000	0%	2,500
LEGISLATIVE COMMITTEE	1,250	-	-	1,250	0%	208
BOG LEGISLATIVE COMMITTEE	300	-	-	300	0%	50
STAFF CONFERENCE & TRAINING	2,400	-	751	1,649	31%	(351)
TOTAL DIRECT EXPENSES:	26,783	47	846	25,937	3%	3,618
INDIRECT EXPENSES:						
SALARY EXPENSE (1.70 FTE)	147,316	12,043	19,503	127,813	13%	5,049
BENEFITS EXPENSE	42,758	3,177	6,344	36,414	15%	782
OTHER INDIRECT EXPENSE	52,607	3,303	8,195	44,413	16%	573
TOTAL INDIRECT EXPENSES:	242,681	18,523	34,042	208,639	14%	6,405
TOTAL ALL EXPENSES:	269,464	18,571	34,888	234,576	13%	10,023
NET INCOME (LOSS):	(269,464)	(18,571)	(34,888)	(234,576)	13%	10,023

Washington State Bar Association

Statement of Activities

For the Period from November 1, 2022 to November 30, 2022

17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LICENSING & MEMBERSHIP RECORDS						
REVENUE:						
STATUS CERTIFICATE FEES	27,000	2,325	4,650	22,350	17%	150
INVESTIGATION FEES	21,000	1,800	3,800	17,200	18%	300
PRO HAC VICE	400,000	28,396	50,380	349,620	13%	(16,287)
MEMBER CONTACT INFORMATION	4,000	625	950	3,050	24%	283
PHOTO BAR CARD SALES	200	12	48	152	24%	15
TOTAL REVENUE:	452,200	33,158	59,828	392,372	13%	(15,539)
DIRECT EXPENSES:						
DEPRECIATION	1,151	-	-	1,151	0%	192
POSTAGE	16,500	2,308	2,407	14,093	15%	343
LICENSING FORMS	2,000	2,401	2,401	(401)	120%	(2,068)
TOTAL DIRECT EXPENSES:	19,651	4,709	4,808	14,843	24%	(1,533)
INDIRECT EXPENSES:						
SALARY EXPENSE (3.83 FTE)	379,520	31,387	62,774	316,747	17%	480
BENEFITS EXPENSE	124,269	9,354	18,731	105,538	15%	1,981
OTHER INDIRECT EXPENSE	118,521	7,460	18,507	100,015	16%	1,247
TOTAL INDIRECT EXPENSES:	622,311	48,202	100,011	522,299	16%	3,707
TOTAL ALL EXPENSES:	641,962	52,911	104,819	537,142	16%	2,174
NET INCOME (LOSS):	(189,762)	(19,753)	(44,991)	(144,770)	24%	(13,364)

Washington State Bar Association

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For the Period from November 1, 2022 to November 30, 2022

17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LEGAL LUNCHBOX						
REVENUE:						
SPONSORSHIPS	9,000	-	-	9,000	0%	(1,500)
DIGITAL VIDEO SALES	14,000	3,724	6,076	7,924	43%	3,743
TOTAL REVENUE:	23,000	3,724	6,076	16,924	26%	2,243
DIRECT EXPENSES:						
SPEAKERS & DEVELOPMENT	1,500	551	551	949	37%	(301)
TOTAL DIRECT EXPENSES:	1,500	551	551	949	37%	(301)
INDIRECT EXPENSES:						
SALARY EXPENSE (0.43 FTE)	27,897	2,193	4,386	23,511	16%	264
BENEFITS EXPENSE	10,037	675	1,349	8,688	13%	324
OTHER INDIRECT EXPENSE	13,183	826	2,049	11,134	16%	148
TOTAL INDIRECT EXPENSES:	51,117	3,694	7,783	43,334	15%	736
TOTAL ALL EXPENSES:	52,617	4,245	8,334	44,282	16%	435
NET INCOME (LOSS):	(29,617)	(521)	(2,258)	(27,358)	8%	2,678

Washington State Bar Association

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LIMITED LICENSE LEGAL TECHNICIAN PROGRAM						
REVENUE:						
SEMINAR REGISTRATIONS	12,000	-	-	12,000	0%	(2,000)
LLLT LICENSE FEES	16,622	951	2,018	14,604	12%	(752)
LLLT LATE LICENSE FEES	1,100	-	-	1,100	0%	(183)
INVESTIGATION FEES	-	-	100	(100)		100
TOTAL REVENUE:	29,722	951	2,118	27,604	7%	(2,835)
DIRECT EXPENSES:						
LLLT BOARD	15,000	-	866	14,134	6%	1,634
LLLT EDUCATION	500	-	-	500	0%	83
TOTAL DIRECT EXPENSES:	15,500	-	866	14,634	6%	1,718
INDIRECT EXPENSES:						
SALARY EXPENSE (0.53 FTE)	51,548	3,998	7,995	43,553	16%	596
BENEFITS EXPENSE	17,299	1,238	2,478	14,821	14%	405
OTHER INDIRECT EXPENSE	16,401	1,046	2,595	13,806	16%	139
TOTAL INDIRECT EXPENSES:	85,248	6,282	13,069	72,180	15%	1,139
TOTAL ALL EXPENSES:	100,748	6,282	13,934	86,814	14%	2,857
NET INCOME (LOSS):	(71,026)	(5,331)	(11,816)	86,814	17%	22

Washington State Bar Association

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For the Period from November 1, 2022 to November 30, 2022

17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LIMITED PRACTICE OFFICERS						
REVENUE:						
INVESTIGATION FEES	500	-	-	500	0%	(83)
LPO EXAMINATION FEES	28,300	5,200	14,500	13,800	51%	9,783
LPO LICENSE FEES	164,750	13,649	27,542	137,208	17%	84
LPO LATE LICENSE FEES	988	-	-	988	0%	(165)
LPO LICENSE FEES - REINSTATES	550	-	-	550	0%	(92)
TOTAL REVENUE:	195,088	18,849	42,042	153,046	22%	9,527
DIRECT EXPENSES:						
FACILITY, PARKING, FOOD	9,000	-	-	9,000	0%	1,500
EXAM WRITING	9,000	-	-	9,000	0%	1,500
LPO BOARD	1,792	-	-	1,792	0%	299
LPO OUTREACH	1,000	-	-	1,000	0%	167
PRINTING & COPYING	250	-	-	250	0%	42
TOTAL DIRECT EXPENSES:	21,042	-	-	21,042	0%	3,507
INDIRECT EXPENSES:						
SALARY EXPENSE (0.68 FTE)	57,874	4,492	8,983	48,891	16%	662
BENEFITS EXPENSE	20,388	1,460	2,923	17,465	14%	475
OTHER INDIRECT EXPENSE	21,043	1,321	3,278	17,765	16%	229
TOTAL INDIRECT EXPENSES:	99,305	7,273	15,184	84,121	15%	1,367
TOTAL ALL EXPENSES:	120,347	7,273	15,184	105,163	13%	4,874
NET INCOME (LOSS):	74,741	11,576	26,858	47,883	36%	14,401

Washington State Bar Association

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For the Period from November 1, 2022 to November 30, 2022

17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MANDATORY CONTINUING LEGAL EDUCATION						
REVENUE:						
ACCREDITED PROGRAM FEES	550,000	51,800	108,500	441,500	20%	16,833
FORM 1 LATE FEES	220,000	22,400	44,400	175,600	20%	7,733
MEMBER LATE FEES	190,000	300	1,200	188,800	1%	(30,467)
ANNUAL ACCREDITED SPONSOR FEES	38,250	-	-	38,250	0%	(6,375)
ATTENDANCE LATE FEES	98,000	11,950	18,950	79,050	19%	2,617
COMITY CERTIFICATES	29,000	6,700	7,175	21,825	25%	2,342
TOTAL REVENUE:	1,125,250	93,150	180,225	945,025	16%	(7,317)
DIRECT EXPENSES:						
DEPRECIATION	59,565	596	2,275	57,290	4%	7,652
STAFF MEMBERSHIP DUES	500	-	-	500	0%	83
MCLE BOARD	2,000	-	-	2,000	0%	333
STAFF TRAVEL/PARKING	50	-	-	50	0%	8
STAFF CONFERENCE & TRAINING	4,900	-	-	4,900	0%	817
TOTAL DIRECT EXPENSES:	67,015	596	2,275	64,740	3%	8,894
INDIRECT EXPENSES:						
SALARY EXPENSE (4.88 FTE)	437,860	47,202	88,842	349,018	20%	(15,865)
BENEFITS EXPENSE	125,455	9,333	18,680	106,775	15%	2,229
OTHER INDIRECT EXPENSE	151,014	9,525	23,628	127,386	16%	1,541
TOTAL INDIRECT EXPENSES:	714,329	66,060	131,150	583,179	18%	(12,095)
TOTAL ALL EXPENSES:	781,344	66,656	133,425	647,919	17%	(3,201)
NET INCOME (LOSS):	343,906	26,494	46,800	297,106	14%	(10,518)

Washington State Bar Association

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MINI CLE						
INDIRECT EXPENSES:	64,627	5,283	10,566	54,062	16%	10,751
SALARY EXPENSE (0.92 FTE)	21,315	1,526	3,048	18,266	14%	504
BENEFITS EXPENSE	28,470	1,789	4,439	24,031	16%	306
OTHER INDIRECT EXPENSE						
TOTAL INDIRECT EXPENSES:	114,412	8,598	18,053	96,359	16%	11,562
NET INCOME (LOSS):	(114,412)	(8,598)	(18,053)	(96,359)	16%	1,016

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MEMBER SERVICES & ENGAGEMENT						
REVENUE:						
ROYALTIES	10,800	15,743	15,778	(4,978)	146%	13,978
SPONSORSHIPS	1,000	-	-	1,000	0%	(167)
TOTAL REVENUE:	11,800	15,743	15,778	(3,978)	134%	13,811
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	1,700	-	-	1,700	0%	283
STAFF CONFERENCE & TRAINING	250	99	99	151	40%	(57)
SMALL TOWN AND RURAL COMMITTEE	3,000	-	-	3,000	0%	500
PRINTING & COPYING	1,200	-	1,300	(100)	108%	(1,100)
NEW LAWYER OUTREACH	1,000	-	-	1,000	0%	167
YLL SECTION PROGRAM	1,500	-	-	1,500	0%	250
WYLC CLE COMPS	1,000	-	-	1,000	0%	167
WYLC OUTREACH EVENTS	1,500	-	-	1,500	0%	250
WYL COMMITTEE	12,000	-	-	12,000	0%	2,000
OPEN SECTIONS NIGHT	3,500	-	-	3,500	0%	583
RECEPTION/FORUM EXPENSE	3,000	-	-	3,000	0%	500
WYLC SCHOLARSHIPS/DONATIONS/GRANT	5,000	-	-	5,000	0%	833
STAFF MEMBERSHIP DUES	850	-	150	700	18%	(8)
LENDING LIBRARY	4,000	10	20	3,980	1%	647
TOTAL DIRECT EXPENSES:	39,500	109	1,569	37,931	4%	5,014
INDIRECT EXPENSES:						
SALARY EXPENSE (2.51 FTE)	165,522	13,066	26,132	139,389	16%	1,454
BENEFITS EXPENSE	59,907	4,414	8,827	51,079	15%	1,157
OTHER INDIRECT EXPENSE	77,549	4,900	12,156	65,394	16%	769
TOTAL INDIRECT EXPENSES:	302,978	22,381	47,115	255,862	16%	3,381
TOTAL ALL EXPENSES:	342,478	22,490	48,684	293,794	14%	8,395
NET INCOME (LOSS):	(330,678)	(6,746)	(32,906)	(297,772)	10%	22,207

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MEMBER SERVICES & ENGAGEMENT (COMBINED)						
REVENUE:						
ROYALTIES	10,800	15,743	15,778	(4,978)	146%	13,978
NMP PRODUCT SALES	65,000	3,377	3,930	61,070	6%	(6,903)
DIGITAL VIDEO SALES	14,000	3,724	6,076	7,924	43%	3,743
SPONSORSHIPS	10,000	-	-	10,000	0%	(1,667)
SEMINAR REGISTRATIONS	8,000	51,335	62,221	(54,221)	778%	60,888
TRIAL ADVOCACY PROGRAM	12,000	-	-	12,000	0%	(2,000)
TOTAL REVENUE:	119,800	74,179	88,005	31,795	73%	68,038
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	1,700	-	-	1,700	0%	283
STAFF CONFERENCE & TRAINING	250	99	99	151	40%	(57)
SMALL TOWN AND RURAL COMMITTEE	3,000	-	-	3,000	0%	500
PRINTING & COPYING	1,200	-	1,300	(100)	108%	(1,100)
NEW LAWYER OUTREACH	1,000	-	-	1,000	0%	167
YLL SECTION PROGRAM	1,500	-	-	1,500	0%	250
WYLC CLE COMPS	1,000	-	-	1,000	0%	167
WYLC OUTREACH EVENTS	1,500	-	-	1,500	0%	250
SPEAKERS & PROGRAM DEVELOP	1,500	551	551	949	37%	(301)
WYL COMMITTEE	12,000	-	-	12,000	0%	2,000
OPEN SECTIONS NIGHT	3,500	-	-	3,500	0%	583
TRIAL ADVOCACY EXPENSES	1,500	-	-	1,500	0%	250
RECEPTION/FORUM EXPENSE	3,000	-	-	3,000	0%	500
WYLC SCHOLARSHIPS/DONATIONS/GRANT	5,000	-	-	5,000	0%	833
STAFF MEMBERSHIP DUES	850	-	150	700	18%	(8)
LENDING LIBRARY	4,000	10	20	3,980	1%	647
NMP SPEAKERS & PROGRAM DEVELOPMENT	100	-	-	100	0%	17
TOTAL DIRECT EXPENSES:	42,600	660	2,120	40,480	5%	4,980
INDIRECT EXPENSES:						
SALARY EXPENSE (4.64 FTE)	311,600	24,921	49,843	261,758	16%	2,091
BENEFITS EXPENSE	108,835	7,848	15,686	93,149	14%	2,453
OTHER INDIRECT EXPENSE	143,340	9,030	22,399	120,940	16%	1,491
TOTAL INDIRECT EXPENSES:	563,775	41,799	87,928	475,847	16%	6,034
TOTAL ALL EXPENSES:	606,375	42,460	90,048	516,327	15%	11,014
NET INCOME (LOSS):	(486,575)	31,720	(2,043)	(484,532)	0%	79,053

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MEMBER WELLNESS PROGRAM						
REVENUE:						
DIVERSIONS	7,500	-	-	7,500	0%	(1,250)
TOTAL REVENUE:	7,500	-	-	7,500	0%	(1,250)
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	500	-	-	500	0%	83
MEMBER WELLNESS COUNCIL	800	-	-	800	0%	133
STAFF CONFERENCE & TRAINING	300	-	-	300	0%	50
SUBSCRIPTIONS	1,200	100	200	1,000	17%	-
TOTAL DIRECT EXPENSES:	2,800	100	200	2,600	7%	267
INDIRECT EXPENSES:						
SALARY EXPENSE (1.48 FTE)	133,673	7,187	13,044	120,628	10%	9,234
BENEFITS EXPENSE	55,402	4,087	8,203	47,199	15%	1,031
OTHER INDIRECT EXPENSE	45,645	2,891	7,170	38,474	16%	437
TOTAL INDIRECT EXPENSES:	234,719	14,165	28,418	206,301	12%	10,702
TOTAL ALL EXPENSES:	237,519	14,265	28,618	208,901	12%	10,969
NET INCOME (LOSS):	(230,019)	(14,265)	(28,618)	(201,401)	12%	9,719

Washington State Bar Association

Statement of Activities

For the Period from November 1, 2022 to November 30, 2022

17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
NEW MEMBER EDUCATION						
REVENUE:						
NMP PRODUCT SALES	65,000	3,377	3,930	61,070	6%	(6,903)
SEMINAR REGISTRATIONS	8,000	51,335	62,221	(54,221)	778%	60,888
TRIAL ADVOCACY PROGRAM	12,000	-	-	12,000	0%	(2,000)
TOTAL REVENUE:	85,000	54,712	66,151	18,849	78%	51,984
DIRECT EXPENSES:						
TRIAL ADVOCACY EXPENSES	1,500	-	-	1,500	0%	250
SPEAKERS & PROGRAM DEVELOPMENT	100	-	-	100	0%	17
TOTAL DIRECT EXPENSES:	1,600	-	-	1,600	0%	267
INDIRECT EXPENSES:						
SALARY EXPENSE (0.78 FTE)	53,555	4,380	8,759	44,795	16%	167
BENEFITS EXPENSE	17,577	1,233	2,462	15,115	14%	467
OTHER INDIRECT EXPENSE	24,137	1,514	3,756	20,382	16%	267
TOTAL INDIRECT EXPENSES:	95,269	7,127	14,977	80,292	16%	901
TOTAL ALL EXPENSES:	96,869	7,127	14,977	81,892	15%	1,168
NET INCOME (LOSS):	(11,869)	47,585	51,174	(63,043)	-431%	53,152

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
OFFICE OF THE EXECUTIVE DIRECTOR						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
LEADERSHIP TRAINING	20,000	-	-	20,000	0%	3,333
WASHINGTON LEADERSHIP INSTITUTE	80,000	-	-	80,000	0%	13,333
ED TRAVEL & OUTREACH	5,000	-	291	4,709	6%	542
BAR LEADERS CONFERENCE	12,000	313	8,114	3,886	68%	(6,114)
STAFF TRAVEL/PARKING	1,500	90	189	1,311	13%	61
STAFF CONFERENCE & TRAINING	8,925	-	-	8,925	0%	1,488
STAFF MEMBERSHIP DUES	1,000	-	335	665	34%	(168)
SURVEY	350	-	-	350	0%	58
TOTAL DIRECT EXPENSES:	128,775	403	8,929	119,846	7%	12,533
INDIRECT EXPENSES:						
SALARY EXPENSE (2.00 FTE)	402,379	33,676	53,230	349,150	13%	13,834
BENEFITS EXPENSE	103,989	7,970	15,952	88,037	15%	1,379
OTHER INDIRECT EXPENSE	61,891	3,909	9,697	52,194	16%	618
TOTAL INDIRECT EXPENSES:	568,259	45,555	78,879	489,380	14%	15,831
TOTAL ALL EXPENSES:	697,034	45,958	87,808	609,226	13%	28,364
NET INCOME (LOSS):	(697,034)	(45,958)	(87,808)	609,226	13%	28,364

Washington State Bar Association

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
OFFICE OF GENERAL COUNSEL						
REVENUE:						
RECORDS REQUEST FEES	963	-	-	963	0%	(161)
TOTAL REVENUE:	963	-	-	963	0%	(161)
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	500	28	28	472	6%	55
STAFF MEMBERSHIP DUES	1,150	-	1,175	(25)	102%	(983)
COURT RULES COMMITTEE	1,000	-	-	1,000	0%	167
CUSTODIANSHIPS	8,150	-	-	8,150	0%	1,358
WILLS	2,000	-	-	2,000	0%	333
LITIGATION EXPENSES	200	-	-	200	0%	33
STAFF CONFERENCE & TRAINING	6,400	-	-	6,400	0%	1,067
MISCELLANEOUS	-	(3)	-	-		-
TOTAL DIRECT EXPENSES:	19,400	25	1,203	18,197	6%	2,030
INDIRECT EXPENSES:						
SALARY EXPENSE (6.17 FTE)	656,837	46,243	92,487	564,350	14%	16,986
BENEFITS EXPENSE	188,816	14,376	28,738	160,079	15%	2,732
OTHER INDIRECT EXPENSE	192,481	12,113	30,048	162,433	16%	2,032
TOTAL INDIRECT EXPENSES:	1,038,134	72,732	151,272	886,862	15%	21,750
TOTAL ALL EXPENSES:	1,057,534	72,757	152,475	905,059	14%	23,781
NET INCOME (LOSS):	(1,056,571)	(72,757)	(152,475)	(904,096)	14%	23,620

Washington State Bar Association

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For the Period from November 1, 2022 to November 30, 2022

17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSE:						
STAFF MEMBERSHIP DUES	100	-	250	(150)	250%	(233)
DISCIPLINARY BOARD EXPENSES	4,000	-	-	4,000	0%	667
CHIEF HEARING OFFICER	30,000	2,500	5,000	25,000	17%	-
HEARING OFFICER EXPENSES	17,500	-	-	17,500	0%	2,917
HEARING OFFICER TRAINING	400	-	-	400	0%	67
OUTSIDE COUNSEL	60,000	4,000	8,000	52,000	13%	2,000
TOTAL DIRECT EXPENSES:	112,000	6,500	13,250	98,750	12%	5,417
INDIRECT EXPENSES:						
SALARY EXPENSE (1.40 FTE)	133,790	11,030	22,060	111,730	16%	238
BENEFITS EXPENSE	40,026	2,969	5,935	34,091	15%	736
OTHER INDIRECT EXPENSE	43,324	2,725	6,761	36,563	16%	460
TOTAL INDIRECT EXPENSES:	217,139	16,725	34,755	182,384	16%	1,435
TOTAL ALL EXPENSES:	329,139	23,225	48,005	281,134	15%	6,851
NET INCOME (LOSS):	(329,139)	(23,225)	(48,005)	(281,134)	15%	6,851

Washington State Bar Association

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PRACTICE OF LAW BOARD						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
PRACTICE OF LAW BOARD	12,000	-	-	12,000	0%	2,000
TOTAL DIRECT EXPENSES:	<u>12,000</u>	<u>-</u>	<u>-</u>	<u>12,000</u>	<u>0%</u>	<u>2,000</u>
INDIRECT EXPENSES:						
SALARY EXPENSE (0.45 FTE)	35,965	2,966	5,933	30,032	16%	61
BENEFITS EXPENSE	13,465	934	1,869	11,595	14%	375
OTHER INDIRECT EXPENSE	13,925	908	2,254	11,672	16%	67
TOTAL INDIRECT EXPENSES:	<u>63,355</u>	<u>4,808</u>	<u>10,056</u>	<u>53,299</u>	<u>16%</u>	<u>504</u>
TOTAL ALL EXPENSES:	<u>75,355</u>	<u>4,808</u>	<u>10,056</u>	<u>65,299</u>	<u>13%</u>	<u>2,504</u>
NET INCOME (LOSS):	<u>(75,355)</u>	<u>(4,808)</u>	<u>(10,056)</u>	<u>(65,299)</u>	<u>13%</u>	<u>2,504</u>

Washington State Bar Association

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For the Period from November 1, 2022 to November 30, 2022

17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PRACTICE MANAGEMENT ASSISTANCE						
REVENUE:						
ROYALTIES	50,000	-	-	50,000	0%	(8,333)
TOTAL REVENUE:	50,000	-	-	50,000	0%	(8,333)
DIRECT EXPENSE:						
STAFF MEMBERSHIP DUES	150	-	-	150	0%	25
FASTCASE	73,000	-	-	73,000	0%	12,167
STAFF CONFERENCE & TRAINING	250	-	-	250	0%	42
TOTAL DIRECT EXPENSES:	73,400	-	-	73,400	0%	12,233
INDIRECT EXPENSES:						
SALARY EXPENSE (0.95 FTE)	80,135	6,594	13,189	66,947	16%	167
BENEFITS EXPENSE	23,499	1,716	3,425	20,075	15%	492
OTHER INDIRECT EXPENSE	29,398	1,844	4,575	24,823	16%	324
TOTAL INDIRECT EXPENSES:	133,033	10,154	21,189	111,844	16%	983
TOTAL ALL EXPENSES:	206,433	10,154	21,189	185,244	10%	13,217
NET INCOME (LOSS):	(156,433)	(10,154)	(21,189)	(135,244)	14%	4,883

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PROFESSIONAL RESPONSIBILITY PROGRAM						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	750	-	-	750	0%	125
STAFF MEMBERSHIP DUES	500	-	-	500	0%	83
CPE COMMITTEE	1,000	-	267	733	27%	(101)
TOTAL DIRECT EXPENSES:	2,250	-	267	1,983	12%	108
INDIRECT EXPENSES:						
SALARY EXPENSE (1.10 FTE)	91,667	11,294	22,588	69,079	25%	(7,311)
BENEFITS EXPENSE	37,219	4,297	8,636	28,583	23%	(2,433)
OTHER INDIRECT EXPENSE	22,435	2,147	5,327	17,109	24%	(1,587)
TOTAL INDIRECT EXPENSES:	151,321	17,738	36,551	114,771	24%	(11,331)
TOTAL ALL EXPENSES:	153,571	17,738	36,818	116,753	24%	(11,223)
NET INCOME (LOSS):	(153,571)	(17,738)	(36,818)	(116,753)	24%	(11,223)

Washington State Bar Association

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PUBLIC SERVICE PROGRAMS						
REVENUE:						
DONATIONS & GRANTS	130,000	-	-	130,000	0%	(21,667)
TOTAL REVENUE:	130,000	-	-	130,000	0%	(21,667)
DIRECT EXPENSES:						
DONATIONS/SPONSORSHIPS/GRANTS	260,828	-	-	260,828	0%	43,471
STAFF TRAVEL/PARKING	1,500	-	-	1,500	0%	250
SURVEYS	100	-	-	100	0%	17
PRO BONO & PUBLIC SERVICE COMMITTEE	1,500	-	-	1,500	0%	250
STAFF CONFERENCE & TRAINING	1,000	-	-	1,000	0%	167
PRO BONO CERTIFICATES	2,000	-	457	1,543	23%	(123)
TOTAL DIRECT EXPENSES:	266,928	-	457	266,471	0%	44,031
INDIRECT EXPENSES:						
SALARY EXPENSE (1.62 FTE)	128,588	10,465	20,930	107,658	16%	501
BENEFITS EXPENSE	40,609	2,989	5,973	34,637	15%	796
OTHER INDIRECT EXPENSE	50,132	3,166	7,853	42,278	16%	502
TOTAL INDIRECT EXPENSES:	219,329	16,620	34,756	184,573	16%	1,799
TOTAL ALL EXPENSES:	486,257	16,620	35,213	451,044	7%	45,830
NET INCOME (LOSS):	(356,257)	(16,620)	(35,213)	(321,044)	10%	24,163

Washington State Bar Association
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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PUBLICATION & DESIGN SERVICES						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF CONFERENCE & TRAINING	350	-	-	350	0%	58
SUBSCRIPTIONS	162	-	-	162	0%	27
IMAGE LIBRARY	4,100	-	4,100	-	100%	(3,417)
TOTAL DIRECT EXPENSES:	4,612	-	4,100	512	89%	(3,331)
INDIRECT EXPENSES:						
SALARY EXPENSE (0.89 FTE)	72,143	5,956	11,913	60,230	17%	111
BENEFITS EXPENSE	19,491	1,395	2,781	16,710	14%	468
OTHER INDIRECT EXPENSE	27,542	1,734	4,302	23,239	16%	288
TOTAL INDIRECT EXPENSES:	119,175	9,086	18,996	100,179	16%	867
TOTAL ALL EXPENSES:	123,787	9,086	23,096	100,691	19%	(2,464)
NET INCOME (LOSS):	(123,787)	(9,086)	(23,096)	(100,691)	19%	(2,464)

Washington State Bar Association

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REGULATORY SERVICES FTE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF CONFERENCE & TRAINING	23,550	-	-	23,550	0%	3,925
TOTAL DIRECT EXPENSES:	23,550	-	-	23,550	0%	3,925
INDIRECT EXPENSES:						
SALARY EXPENSE (2.70 FTE)	349,467	22,516	45,032	304,435	13%	13,212
BENEFITS EXPENSE	103,888	7,885	15,785	88,103	15%	1,530
OTHER INDIRECT EXPENSE	83,553	5,258	13,043	70,509	16%	882
TOTAL INDIRECT EXPENSES:	536,908	35,659	73,860	463,047	14%	15,624
TOTAL ALL EXPENSES:	560,458	35,659	73,860	486,597	13%	19,549
NET INCOME (LOSS):	(560,458)	(35,659)	(73,860)	(486,597)	13%	19,549

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SERVICE CENTER						
REVENUE:						
	_____	_____	_____	_____	_____	_____
TOTAL REVENUE:	-	-	-	-	-	-
DIRECT EXPENSES:						
	_____	_____	_____	_____	_____	_____
TRANSLATION SERVICES	8,200	225	612	7,588	7%	754
STAFF CONFERENCE & TRAINING	2,100	-	-	2,100	0%	350
TOTAL DIRECT EXPENSES:	10,300	225	612	9,688	6%	1,104
INDIRECT EXPENSES:						
SALARY EXPENSE (5.71 FTE)	383,690	31,339	63,034	320,656	16%	914
BENEFITS EXPENSE	142,992	10,655	21,319	121,672	15%	2,512
OTHER INDIRECT EXPENSE	176,699	11,149	27,658	149,041	16%	1,792
TOTAL INDIRECT EXPENSES:	703,381	53,143	112,011	591,370	16%	5,219
TOTAL ALL EXPENSES:	713,681	53,369	112,623	601,057	16%	6,323
NET INCOME (LOSS):	(713,681)	(53,369)	(112,623)	(601,057)	16%	6,323

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SECTIONS ADMINISTRATION						
REVENUE:						
REIMBURSEMENTS FROM SECTIONS	290,543	989	93,155	197,388	32%	44,731
TOTAL REVENUE:	290,543	989	93,155	197,388	32%	44,731
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	750	14	14	736	2%	111
SUBSCRIPTIONS	350	-	-	350	0%	58
SECTION/COMMITTEE CHAIR MTGS	1,000	456	456	544	46%	(289)
DUES STATEMENTS	5,000	-	-	5,000	0%	833
STAFF CONFERENCE & TRAINING	500	-	-	500	0%	83
STAFF MEMBERSHIP DUES	250	-	-	250	0%	42
TOTAL DIRECT EXPENSES:	7,850	470	470	7,380	6%	839
INDIRECT EXPENSES:						
SALARY EXPENSE (2.58 FTE)	149,581	11,854	23,975	125,605	16%	955
BENEFITS EXPENSE	61,326	4,493	8,993	52,333	15%	1,228
OTHER INDIRECT EXPENSE	79,839	5,038	12,497	67,342	16%	810
TOTAL INDIRECT EXPENSES:	290,746	21,385	45,465	245,281	16%	2,992
TOTAL ALL EXPENSES:	298,596	21,855	45,935	252,661	15%	3,831
NET INCOME (LOSS):	(8,053)	(20,866)	47,220	(55,274)	-586%	48,562

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SECTIONS OPERATIONS						
REVENUE:						
SECTION DUES	440,225	1,645	141,980	298,245	32%	68,609
SEMINAR PROFIT SHARE	147,470	-	-	147,470	0%	(24,578)
INTEREST INCOME	13,120	-	-	13,120	0%	(2,187)
PUBLICATIONS REVENUE	2,000	-	-	2,000	0%	(333)
OTHER	46,880	3,120	3,685	43,195	8%	(4,128)
TOTAL REVENUE:	649,695	4,765	145,665	504,030	22%	37,383
DIRECT EXPENSES:						
DIRECT EXPENSES OF SECTION ACTIVITIES	632,503	11,672	25,631	606,872	4%	79,786
REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES	272,143	989	93,155	178,987	34%	(47,798)
TOTAL DIRECT EXPENSES:	904,646	12,661	118,787	785,859	13%	31,988
NET INCOME (LOSS):	(254,951)	(7,896)	26,878	(281,829)	-11%	69,370

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17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
TECHNOLOGY						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	110,000	15,009	20,517	89,484	19%	(2,183)
STAFF TRAVEL/PARKING	2,000	76	76	1,924	4%	257
STAFF MEMBERSHIP DUES	450	-	-	450	0%	75
TELEPHONE	95,000	6,889	12,889	82,111	14%	2,944
COMPUTER HARDWARE	65,000	2,571	15,544	49,456	24%	(4,711)
COMPUTER SOFTWARE	310,000	9,168	43,780	266,220	14%	7,887
HARDWARE SERVICE & WARRANTIES	60,000	546	31,206	28,794	52%	(21,206)
SOFTWARE MAINTENANCE & LICENSING	380,000	1,595	101,006	278,994	27%	(37,673)
COMPUTER SUPPLIES	2,000	-	-	2,000	0%	333
THIRD PARTY SERVICES	40,000	2,109	2,980	37,020	7%	3,687
STAFF CONFERENCE & TRAINING	10,000	-	-	10,000	0%	1,667
TRANSFER TO INDIRECT EXPENSES	(1,074,450)	(37,962)	(227,997)	(846,453)	21%	48,922
TOTAL DIRECT EXPENSES:	-	-	-	-		-
INDIRECT EXPENSES:						
SALARY EXPENSE (13.00 FTE)	1,434,416	116,438	237,059	1,197,357	17%	2,011
BENEFITS EXPENSE	439,894	33,521	67,092	372,802	15%	6,224
CAPITAL LABOR & OVERHEAD	(280,000)	(33,158)	(69,586)	(210,414)	25%	(22,919)
OTHER INDIRECT EXPENSE	402,292	25,354	62,895	339,396	16%	4,153
TOTAL INDIRECT EXPENSES:	1,996,602	142,155	297,460	1,699,142	15%	(10,531)
TOTAL ALL EXPENSES:	1,996,602	142,155	297,460	1,699,142	15%	(10,531)
NET INCOME (LOSS):	(1,996,602)	(142,155)	(297,460)	(1,699,142)	15%	35,307

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VOLUNTEER ENGAGEMENT						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	350	90	140	210	40%	(82)
STAFF CONFERENCE & TRAINING	2,500	-	450	2,050	18%	(33)
ABA DELEGATES	15,000	-	-	15,000	0%	2,500
TOTAL DIRECT EXPENSES:	17,850	90	590	17,260	3%	2,385
INDIRECT EXPENSES:						
SALARY EXPENSE (0.60 FTE)	59,415	4,922	9,844	49,570	17%	58
BENEFITS EXPENSE	19,657	1,411	2,824	16,833	14%	452
OTHER INDIRECT EXPENSE	18,567	1,184	2,936	15,631	16%	158
TOTAL INDIRECT EXPENSES:	97,639	7,517	15,605	82,034	16%	668
TOTAL ALL EXPENSES:	115,489	7,607	16,195	99,294	14%	668
NET INCOME (LOSS):	(115,489)	(7,607)	(16,195)	(99,294)	14%	3,053

Washington State Bar Association

Statement of Activities
For the Period from November 1, 2022 to November 30, 2022
17% OF YEAR COMPLETE

	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
INDIRECT EXPENSES:						
SALARIES	13,113,765	1,015,053	2,015,058	11,098,707	15%	170,569
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(33,333)
TEMPORARY SALARIES	200,627	23,002	41,296	159,331	21%	(7,858)
CAPITAL LABOR & OVERHEAD	(280,000)	(33,158)	(69,586)	(210,414)	25%	(22,919)
EMPLOYEE ASSISTANCE PLAN	4,800	1,200	1,600	3,200	33%	(800)
EMPLOYEE SERVICE AWARDS	2,038	400	520	1,518	26%	(180)
FICA (EMPLOYER PORTION)	806,675	71,665	144,861	661,814	18%	(10,415)
L&I INSURANCE	62,000	-	-	62,000	0%	10,333
WA STATE FAMILY MEDICAL LEAVE (EMPI	18,000	1,498	3,035	14,965	17%	(35)
MEDICAL (EMPLOYER PORTION)	1,701,951	124,830	253,388	1,448,563	15%	30,270
RETIREMENT (EMPLOYER PORTION)	1,356,286	105,503	208,881	1,147,405	15%	17,167
TRANSPORTATION ALLOWANCE	65,045	3,083	3,433	61,612	5%	7,408
UNEMPLOYMENT INSURANCE	65,206	2,562	5,770	59,436	9%	5,097
TOTAL SALARY & BENEFITS EXPENSE:	16,916,394	1,315,638	2,608,257	14,308,137	15%	165,304
WORKPLACE BENEFITS	45,980	522	9,441	36,539	21%	(1,778)
HUMAN RESOURCES POOLED EXP	77,100	3,901	8,211	68,889	11%	4,639
MEETING SUPPORT EXPENSES	10,000	64	475	9,525	5%	1,192
RENT	2,131,247	158,011	313,176	1,818,071	15%	42,032
PERSONAL PROP TAXES-WSBA	6,650	472	945	5,705	14%	163
FURNITURE, MAINT, LH IMP	25,300	873	873	24,427	3%	3,344
OFFICE SUPPLIES & EQUIPMENT	18,000	2,092	3,623	14,377	20%	(623)
FURN & OFFICE EQUIP DEPRECIATION	96,357	5,225	10,453	85,904	11%	5,607
COMPUTER HARDWARE DEPRECIATION	45,354	3,937	7,873	37,481	17%	(314)
COMPUTER SOFTWARE DEPRECIATION	99,251	7,871	15,644	83,607	16%	898
INSURANCE	272,643	22,025	44,050	228,593	16%	1,390
WORK HOME FURNITURE & EQUIP	14,000	675	675	13,325	5%	1,658
PROFESSIONAL FEES-AUDIT	50,000	-	-	50,000	0%	8,333
PROFESSIONAL FEES-LEGAL	250,000	11,343	11,352	238,648	5%	30,314
ONLINE LEGAL RESEARCH	-	7,037	8,827	(8,827)		(8,827)
TELEPHONE & INTERNET	33,600	490	570	33,030	2%	5,030
POSTAGE - GENERAL	24,000	622	1,759	22,241	7%	2,241
RECORDS STORAGE	30,000	3,920	5,794	24,206	19%	(794)
BANK FEES	51,000	4,881	7,660	43,340	15%	840
PRODUCTION MAINTENANCE & SUPPLIES	15,340	3,369	3,504	11,836	23%	(947)
COMPUTER POOLED EXPENSES	1,074,450	37,962	227,997	846,453	21%	(48,922)
TOTAL OTHER INDIRECT EXPENSES:	4,370,272	275,292	682,901	3,687,371	16%	45,477
TOTAL INDIRECT EXPENSES:	21,286,666	1,590,931	3,291,158	17,995,507	15%	256,619

Washington State Bar Association
Statement of Activities
For the Period from November 1, 2022 to November 30, 2022
17% OF YEAR COMPLETE

SUMMARY PAGE	FISCAL 2023 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE
ACCESS TO JUSTICE	(358,902)	(18,536)	(51,177)	(307,724)
ADMISSIONS/BAR EXAM	59,088	48,525	229,988	(170,901)
ADVANCEMENT FTE	(362,565)	(27,259)	(56,065)	(306,501)
BAR NEWS	(93,267)	(11,718)	(31,093)	(62,174)
BOARD OF GOVERNORS	(563,600)	(51,141)	(73,810)	(489,790)
CLE - PRODUCTS	686,086	94,563	138,714	547,372
CLE - SEMINARS	(419,115)	17,827	(37,196)	(381,919)
CLIENT PROTECTION FUND	45,788	93,640	96,126	(50,339)
CHARACTER & FITNESS BOARD	(166,623)	(10,873)	(22,405)	(144,218)
COMMUNICATIONS	(787,329)	(53,895)	(110,501)	(676,828)
COMMUNICATIONS FTE	(243,400)	(19,280)	(39,501)	(203,899)
DESKBOOKS	(49,735)	330	(18,057)	(31,678)
DISCIPLINE	(6,095,728)	(439,997)	(906,020)	(5,189,707)
DIVERSITY	(360,227)	(21,078)	(39,542)	(320,685)
FINANCE	(1,068,220)	(34,042)	(80,056)	(988,164)
FOUNDATION	(152,797)	(11,218)	(23,413)	(129,385)
HUMAN RESOURCES	(291,667)	(44,126)	(92,443)	(199,224)
LAW CLERK PROGRAM	41,201	(10,026)	(21,305)	62,506
LEGISLATIVE	(269,464)	(18,571)	(34,888)	(234,576)
LEGAL LUNCHBOX	(29,617)	(521)	(2,258)	(27,358)
LICENSE FEES	17,053,467	1,352,154	2,748,922	14,304,545
LICENSING AND MEMBERSHIP	(189,762)	(19,753)	(44,991)	(144,770)
LIMITED LICENSE LEGAL TECHNICIAN	(71,026)	(5,331)	(11,816)	(59,211)
LIMITED PRACTICE OFFICERS	74,741	11,576	26,858	47,883
MANDATORY CLE ADMINISTRATION	343,906	26,494	46,800	297,106
MEMBER WELLNESS PROGRAM	(230,019)	(14,265)	(28,618)	(201,401)
MINI CLE	(114,412)	(8,598)	(18,053)	(96,359)
MEMBER SERVICES & ENGAGEMENT	(330,678)	(6,746)	(32,906)	(297,772)
NEW MEMBER EDUCATION	(11,869)	47,585	51,174	(63,043)
OFFICE OF GENERAL COUNSEL	(1,056,571)	(72,757)	(152,475)	(904,096)
OFFICE OF THE EXECUTIVE DIRECTOR	(697,034)	(45,958)	(87,808)	(609,226)
OGC-DISCIPLINARY BOARD	(329,139)	(23,225)	(48,005)	(281,134)
PRACTICE OF LAW BOARD	(75,355)	(4,808)	(10,056)	(65,299)
PRACTICE MANAGEMENT ASSISTANCE	(156,433)	(10,154)	(21,189)	(135,244)
PROFESSIONAL RESPONSIBILITY PROGRAM	(153,571)	(17,738)	(36,818)	(116,753)
PUBLIC SERVICE PROGRAMS	(356,257)	(16,620)	(35,213)	(321,044)
PUBLICATION & DESIGN SERVICES	(123,787)	(9,086)	(23,096)	(100,691)
REGULATORY SERVICES FTE	(560,458)	(35,659)	(73,860)	(486,597)
SECTIONS ADMINISTRATION	(8,053)	(20,866)	47,220	(55,274)
SECTIONS OPERATIONS	(254,951)	(7,896)	26,878	(281,829)
SERVICE CENTER	(713,681)	(53,369)	(112,623)	(601,057)
TECHNOLOGY	(1,996,602)	(142,155)	(297,460)	(1,699,142)
VOLUNTEER EDUCATION	(115,489)	(7,607)	(16,195)	(99,294)
INDIRECT EXPENSES	21,286,666	1,590,931	3,291,158	17,995,507
TOTAL OF ALL	(20,733,539)	(1,988,754)	(4,012,927)	(16,720,611)
NET INCOME (LOSS)	(553,127)	397,823	721,769	(1,274,896)