BOARD OF GOVERNORS MEETING

May 2, 2025

Meeting Materials

Port Angeles, WA Zoom and Teleconference



Board of Governors Meeting Red Lion Hotel, Port Angeles, WA May 2, 2025

WSBA Mission: To serve the public and the members of the Bar, to ensure the integrity of the legal profession, and to champion justice.

ALL ITEMS ON THIS AGENDA ARE POTENTIAL ACTION ITEMS

To participate by Zoom or Teleconference:

Friday, May 2: Meeting ID: 828 7932 4444 Passcode: 899686 https://wsba.zoom.us/j/82879324444?pwd=jJ7x9V2Qey47hjlGROV4ai39zD3mF7.1

To participate by phone, call +1 253-205-0468

FRIDAY, MAY 2, 2025

9:00 AM - CALL TO ORDER & WELCOME

EXECUTIVE SESSION

□ RECEIVE AND DISCUSS LEGAL ADVICE

MEMBER & PUBLIC COMMENT

□ MEMBER AND PUBLIC COMMENTS

Overall public comment is limited to 30 minutes and each speaker is limited to 3 minutes. The President will provide an opportunity for public comment for those in the room and participating remotely. Public comment will also be permitted at the beginning of each agenda item, at the President's discretion.

STANDING REPORTS

□ PRESIDENT'S REPORT

CONSENT CALENDAR

 \Box CONSENT CALENDAR

A governor may request that an item be removed from the consent calendar without providing a reason and it will be discussed immediately after the consent calendar. The remaining items will be voted on *en bloc*.

- Approve March 12, 2025, Board of Governors Special Meeting Minutes......11
- Authorize Hiring of Special Disciplinary Counsel
- Approve Awards Committee Recommendations
- Accept Presidential Appointment for Co-Chair of the Pro Bono & Public Service Committee..35
- Approve Judicial Recommendation Committee Recommendations40

ELECTION

AGENDA ITEMS & UNFINISHED BUSINESS

- SECOND READING: EQUITY AND JUSTICE PLAN, DEI Council Co-Chairs Raina Wagner and Gov. Nam Nguyen and Equity and Justice Plan Committee Co-Chairs Sharon Sakamoto and Miryam Gordon.57
- **FY25 REFORECAST BUDGET**, Treasurer Kari Petrasek and Director of Finance Tiffany Lynch........79

RECOMMENDATIONS RE: CLIENT PROTECTION FUND ASSESSMENT AND PRACTICE RULE 15	
CHANGES, Treasurer Kari Petrasek and Director of Finance Tiffany Lynch14	1
FIRST READ: LICENSE FEE PHILOSOPHY, Treasurer Kari Petrasek and Director of Finance Tiffany	
Lynch	C

11:30 AM - 1:30 PM - RECESS

SPECIAL REPORTS

AGENDA ITEMS & UNFINISHED BUSINESS CONTINUED

GOVERNOR ROUNDTABLE

□ GOVERNOR ROUNDTABLE

The WSBA is committed to full access and participation by persons with disabilities to Board of Governors meetings. If you require accommodation for these meetings, please contact accommodations@wsba.org.

MEETING FEEDBACK

□ MEETING FEEDBACK

EXECUTIVE SESSION

□ CONFIDENTIAL BRIEFING ON SELECTION OF COUNSEL FOR AMICUS FOR PERKINS COIE CASE

5:00 PM – ADJOURN

INFORMATION

•	Committee on Professional Ethics New Advisory Opinion 202501	.543
•	Monthly Financial Reports, Unaudited	.551
•	General Information	.606

TO:	WSBA Board of Governors
FROM:	Executive Director Terra Nevitt
DATE:	April 18, 2025
RE:	Executive Director's Report

Winter Bar Exam Results

Congratulations to the 135 folks that passed the February 2025 Lawyer Bar Exam! The overall pass rate for the exam was 43%, which is a decrease from the pass rates for the exams in February 2024 (47%) and February 2023 (52%). Note that the pass rates for July exams are generally significantly higher. The pass list is available on our <u>website</u>, where you can also find information about bar exam pass rates.

Board of Governor Elections

The elections for the congressional district positions for the Board of Governors concluded at 5pm on April 1, 2025. Congratulations to Gov. Kari Petrasek and Gov. Nam Nguyen who were reelected to Districts 2 and 10, respectively. Voter turnout was 10.45% for District 2 and 12.49% in District 10. More information about the election results is available <u>here</u>.

The application period for the Governor At Large position closed at 5pm on Tuesday, April 15. WSBA received applications from Gov. Christopher Bhang (incumbent), Uzma Hamid, and Scott Stafne. Following the process set forth in the WSBA Bylaws, the Diversity, Equity, and Inclusion Council will interview the applicants on April 30 and forward candidates for election by the WSBA membership. The election will take place from May 15-June 2. Additional election information is available <u>here</u>.

Inaugural Bar Leaders Summit

After many months of dreaming and planning, the inaugural Bar Leaders Summit is nearly here! It will be held at the WSBA Office on April 25, 2025, with a welcome dinner on April 24. All Governors should have a calendar invitation and are encouraged to attend. It looks like we will have a great turnout, with 60+ county and affinity bar leaders registered to attend. The agenda will be focused on the issues bar leaders have told us are most relevant and urgent: networking, learning about volunteer engagement and recruitment, sharing WSBA resources, etc.

WSBA Ambassador Program to Kick-Off on Law Day, May 1, 2025

A reminder that the <u>Rule of Law Ambassador Program</u> will kick-off on May 1, with events all over the state, including Bellingham, Colville, Kelso, Kent, Seattle, Spokane, the Tri-Cities, and Vancouver. There will also be an anchor event with the Supreme Court in Olympia, with in-person and virtual components. These events are an opportunity for Washington's legal community to re-affirm their professional oath to uphold the Constitution and stand together to

commit to the promise of the rule of law. We hope to have members of the Board of Governors at as many of the events as possible. Folks can RSVP for an event <u>here</u>. Note that an RSVP is not necessary, but will help our tracking!

As part of the kick-off events, we will be releasing a toolkit to support attorney engagement in their local communities to provide reliable information about the legal system and the rule of law. Following our May 1 events, we will host our first Ambassador CLE training at noon on Tuesday, May 6. See the <u>website</u> for up-to-date information.

Attachments Q2 FY25 Budget Reallocations Media Report <u>Member Demographics Report</u> Litigation Report (confidential)

То:	Board of Governors Budget and Audit Committee
From:	Terra Nevitt, Executive Director
Date:	April 7, 2025
Subject:	FY 2025 Budget Reallocations for Q2

Background

WSBA Fiscal Policies allows the Executive Director to approve the reallocation of budgeted and unbudgeted expenditures within certain limitations. Specifically, the policy states:

"The Executive Director approves and reports to the Board of Governors about certain unbudgeted expenses, including reallocations of budgeted expenditures where the intent is similar or varies slightly; unbudgeted expenditures that are fully offset by unbudgeted revenue or a reallocation of budgeted expenditures up to 5% of the approved operating budget to address operational, regulatory or programmatic needs; and necessary and prudent expenditures to implement WSBA's Disaster Recovery Plan or to maintain WSBA's operations. Per occurrence limit is \$215,000.00. Reallocations may not affect the annual budget's bottom line. The Executive Director must report reallocation of funds to the President on a monthly basis and to the Board on a quarterly basis. It is expected that the Executive Director will consult with the President on reallocations that may be considered sensitive or controversial in nature, prior to execution."

President Anjilvel was notified of the monthly reallocations on February 10, March 10, and April 7.

For FY 2025, the WSBA's annual operating budget is \$27,956,320 and the Executive Director's limit for reallocation is up to \$1,397,816 (5%). The total amount of funds reallocated from October 1 through March 31st are \$168,034.30 (0.60% of annual operating budget).

FY25 Budget Reallocations for Q2

- Salaries, Benefits & Other Indirect Expenses WSBA indirect expenses are allocated to cost centers based on the estimated amount of staff time spent doing work to support the cost center. The estimates are developed during the budget process each year and can change from time to time. A reallocation of staff time was approved between the Communications Strategies, Office of Executive Director, and Board of Governors cost centers for a total of \$71,064 in salaries, benefits, and other indirect expenses. There is no net impact on the budget and all expenses remain within the General Fund.
- 2. Temporary Staffing:
 - a. Unanticipated temporary staffing support was needed during a staff leave of absence for the Regulatory Services Department. The estimated cost of \$1,500 was reallocated from the temporary staff budget in the Licensing and Membership Records cost center to the remaining Regulatory Services Department cost centers.
 - b. Funds are needed to complete our project to transfer from paper to electronic records, specifically

for temporary staff time to scan remaining documents in the amount of \$10,120. Funds are available from the Furniture, Maintenance, and Leasehold Improvement budget to support this need.

- 3. Capital Computer Hardware- WSBA has three servers that need to be replaced and are considered a capital purchase which means the cost of the items will be depreciated over the useful life of the server (3 years). We have funds available in the Salaries and Retirement benefits budgets in the Technology cost center (resulting from an open position that is planned to be held vacant for the fiscal year) that have been reallocated to support this hardware need.
- 4. *BOG Retreat-* The FY25 budget was intended to cover two retreats for the Board of Governors, one in October and another in July. Expenses for the October retreat were higher than expected so additional funds in the amount of \$3,000 are needed to support the July retreat and available to be reallocated from the BOG Conference Attendance budget.

MEMO

- To: Board of Governors
- **From:** Jennifer Olegario, Communications and Outreach Manager, and Sara Niegowski, Chief Communications Officer

Date: April 8, 2025

Re: Summary of Media Contacts, Feb. 18-April 8, 2025

Date	Journalist and Media Outlet	Inquiry
March 3	Megan Ulu-Lani Boyanton, Denver Post	Inquired about grievances against a member. Told her there is no public information for that person.
March 10	Rachel Riley, Law360	Inquired whether the just-scheduled special meeting was in reaction to an executive order regarding Perkins Coie. Responded that we were not able to provide more information.
March 13	Amy Radil, KUOW	Wanted to receive a copy of the statement adopted by the Board in support of an independent judiciary; inquired about the vote to adopt it.
March 19	Sara Merken, Reuters	Asked for update on Entity Regulation Pilot Project; worked with RSD leaders to provide information, sent her TVW recording of update at meeting with Supreme Court.
March 25	Madeline Ottilie, Cox Media Group (KIRO 7)	Asked for a referral to an immigration lawyer for an article about green-card revocation. Found an immigration attorney to return her call.

March 28	Amy Radil, KUOW	Inquired about an immigration attorney to answer questions about student visa holders. Found two immigration attorneys to refer her to.
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News Coverage

- <u>"50-Year Resident and Green Card Holder Being Held in Ice Detention in Tacoma,"</u> KIRO7, March 25
- "Over 50 Bar Associations Stand Up for the Rule of Law," Above the Law, March 26
- "<u>Public Defense Unions Raises Concerns Over Constantine's Pick for DPD Director</u>," PubliCola, March 29

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BOARD OF GOVERNORS SPECIAL MEETING MINUTES Virtual March 12, 2025

Call to Order and Welcome (link)

The meeting of the Board of Governors of the Washington State Bar Association (WSBA) was called to order by President Sunitha Anjilvel on Wednesday, March 12, at 7:03 p.m. Governors in attendance were:

Chris Bhang Mary Rathbone Matthew Dresden Tom Ahearne Kevin Fay Kristina Larry Todd Bloom Nam Nguyen Allison Widney Jordan Couch Kari Petrasek Emily Arneson Parvin Price Alain Villeneuve

Officers and Executive Staff in attendance were President Sunitha Anjilvel, President-Elect Francis Adewale, Immediate-Past President Dan Clark, Executive Director Terra Nevitt, Chief Regulatory Counsel Renata Garsia, Director of Finance Tiffany Lynch, General Counsel Laurie Powers, and Chief Disciplinary Counsel Doug Ende

Also in attendance were Ann Christian, Aziza Ozgoren, Jennifer Olegario, Darren Carnell, Cat Connell, Paul Apple, Brian Tollefson, Nancy Hawkins, Oliver Garrison, Barbara Prowant, Fabiola Jimenez, Bruce Turcott, Julia Doherty, and Mike Brandenberg.

Executive Session

President Anjilvel moved the Board to executive session at 7:05 p.m. to receive legal advice regarding and discuss actions targeting legal professionals. The session concluded at 8:15 p.m. and the Board resumed the public session. Gov. Jordan Couch moved to approve a statement in Support of an Independent Legal Profession Free from Government Retaliation. Motion passed 13 to 1.

<u>Adjournment</u>

There being no further business, President Anjilvel adjourned the meeting at 8:25 p.m. on Wednesday, March 12, 2025.

Respectfully submitted,

Terra Nevitt WSBA Executive Director & Secretary

BOARD OF GOVERNORS MEETING MINUTES

Shelton, WA March 21-22, 2025

Call to Order and Welcome (link)

The meeting of the Board of Governors of the Washington State Bar Association (WSBA) was called to order by President Sunitha Anjilvel on Friday, March 21, at 1:02 p.m. Governors in attendance were:

Chris Bhang Mary Rathbone Matthew Dresden Tom Ahearne Kevin Fay Kristina Larry Todd Bloom Nam Nguyen Allison Widney Jordan Couch Kari Petrasek Emily Arneson Parvin Price Alain Villeneuve

Officers and Executive Staff in attendance were President Sunitha Anjilvel, President-Elect Francis Adewale, Immediate-Past President Dan Clark, Executive Director Terra Nevitt, Chief Communications and Outreach Officer Sara Niegowski, Director of Finance Tiffany Lynch, Chief Regulatory Counsel Renata Garcia, Director of Advancement Kevin Plachy, Chief Equity & Justice Officer Diana Singleton, General Counsel Laurie Powers, Deputy Director Dua Abudiab, Chief Disciplinary Counsel Doug Ende and HR Director & Chief Culture Officer Glynnis Klinefelter Sio.

Also in attendance were Ann Christian, Aziza Ozgoren, Betsylew Miale-Gix, Brent Williams-Ruth, Bob Boruchowitz, Bonnie Sterken, Carolyn MacGregor, Catherine Schur, George Yeannakis, Greg Lamm, Follis Stark, Jennifer Olegario, Julianne Unite, Kalin Bornemann, Liz Mustin, Maialisa Vanyo, Melissa Bailey, Nancy Hawkins, Paris Eriksen, Raina Wagner, Rex Nolte, Sharon Sakamoto, Shelly Bynum, Tamara Garrison, Vanessa Sweeney and Wen James Min.

Member & Public Comments (link)

President Anjilvel opened the session for member and public comments. Tamara Garrison inquired about the Board's GR 12.2 analysis related to a recent statement on an independent legal profession. Executive Director Nevitt confirmed that a thorough analysis was conducted, ensuring alignment with WSBA's purposes as a mandatory bar. Wen James Min asked about the inclusion of public board members, which would be addressed later in the agenda. Brent Williams-Ruth expressed concerns about delays in the Bar Licensure Task Force's character and fitness report. Executive Director Nevitt provided an update on recent correspondence with the Supreme Court regarding the report.

President's Report (link)

President Anjilvel encouraged to share bar activities and talking points with their communities to maintain transparency.

Executive Director's Report (link)

Executive Director Terra Nevitt referred to her written report and invited questions. There were none.

Consent Calendar (link)

Executive Director Nevitt introduced the consent calendar. Gov. Kevin Fay moved to for approval. Motion passed unanimously.

Update & Implementation Challenges Re Standards for Indigent Defense (link)

Maialisa Vanyo, Chair of the Council on Public Defense (CPD) and Liz Mustin from Washington State Office of Public Defense provided an update on the challenges with respect to implementation of the WSBA Standards for Indigent Defense approved by the Board of Governors. Chair Vanyo provided background information about the role of the CPD, and the development of the standards, noting that the WSBA standards are under review by the Supreme Court to consider aligning the related court rules with the updated WSBA Standards. Chair Vanyo highlighted the importance of ensuring effective legal representation by addressing defender workload and qualifications. She expressed concerns about funding shortfalls and recruitment challenges, particularly in rural areas. The Office of Public Defense has requested additional funding to support counties in meeting these standards, but the state budget situation remains uncertain. The Board discussed the ethical implications of attorneys managing excessive caseloads and the necessity of engaging with legislators to advocate for adequate funding and support for public defense. Further updates are expected at the May Board meeting.

First Reading: Equity and Justice Plan (link)

DEI Council Co-Chairs Raina Wagner, along with Equity and Justice Plan Committee Co-Chairs Sharon Sakamoto and Miryam Gordon, presented the Equity and Justice Plan for its first reading. The Plan is the culmination of two years of collaborative work aimed at enhancing legal services through diversity, equity, and inclusion. The presenters emphasized the plan's role as a living document designed to guide WSBA's efforts in achieving equitable outcomes. Key discussions included the historical context of the plan, the importance of measurable outcomes, and the integration of the plan into WSBA's strategic framework. Feedback from the Board included the need for clear action items, regular demographic studies to track progress, and the inclusion of diverse voices in the implementation process. Brent Williams-Ruth underscored the significance of leadership in executing the plan's objectives. The session concluded with a call for further input before the second reading, highlighting the plan's potential to shape WSBA's future initiatives.

First Reading: Proposal to Add Public Members to the Board of Governors (link)

Gov. Jordan Couch, Volunteer Engagement Advisor Paris Eriksen, and Assistant General Counsel Cate Schur presented a proposal to add two public members to the Board of Governors. Gov. Couch emphasized the importance of including public perspectives to better serve the public, aligning with WSBA's mission. The proposal suggests that public members, appointed by the Washington Supreme Court, would serve threeyear terms with voting rights and could serve as treasurer, though not in presidential roles. The discussion highlighted both support and concerns. After thorough discussion, the Board agreed to consider further feedback and explore potential compromises before a second reading.

Proposal to Create a BOG Governance Committee (link)

President Anjilvel and General Counsel Laurie Powers presented the proposed governance committee charter, aiming to establish a systematic triennial review of bylaws, policies, and board committees. The proposal allows for flexibility in review timelines and includes provisions for staff support. Nancy Hawkins and Gov. Emily Arneson raised concerns about the potential top-down approach with respect to the evaluation of sections. Past Governor Brent Williams-Ruth clarified that the intent is to streamline and align bylaws, not to overhaul the organization. Gov. Fay emphasized that the review focuses on board committees, not sections. Gov. Kevin Fay moved to approve the governance committee charter as presented. The motion passed unanimously, with Gov. Alain Villeneuve was not present for the vote.

<u>Recess</u>

President Anjilvel recessed the meeting for the day at 4:55 p.m.

<u>Day Two (link)</u>

President Anjilvel called day two of the board meeting to order at 9:11 a.m.

FY26 Budget Retreat (link)

Treasurer Kari Petrasek, Finance and Director Tiffany Lynch, and Chief Communications Officer Sara Niegowski led a discussion on developing a license fee philosophy. The aim is to establish a consistent approach to setting license fees, emphasizing the importance of smaller routine adjustments rather than more infrequent, but more significant increases. The Board reviewed the role of the unrestricted reserve fund in supporting fee changes and considered the impact of inflation and cost-of-living adjustments on budgeting. Members discussed the need for transparent communication with the membership regarding fee adjustments, highlighting member benefits and WSBA's regulatory obligations. There was consensus on the importance of aligning fee structures with operational needs and member expectations. The Board agreed to gather member feedback on the proposed philosophy, aiming for transparency and engagement.

Discussion Re License Fee Hardship Exemption (link)

Gov. Jordan Couch and Chief Regulatory Counsel Renata Garcia presented a proposal to expand the license fee hardship exemption. The proposal suggests increasing the exemption from two to three times in a career and adjusting the eligibility criteria from 200% to 270% of the federal poverty level (FPL), aligning with the Asset Limited, Income Constrained, Employed (ALICE) metric. The proposed changes aim to support members experiencing financial hardship, acknowledging the economic challenges faced by those earning below \$42,000 annually (200% of the FPL for a household of two). The Board discussed the importance of equitable language, suggesting terms like "scholarship" or "grant" to reduce stigma. The proposal will undergo fiscal and equity analyses before returning for a first reading. The Board expressed general support, emphasizing the need for inclusivity and understanding of diverse financial situations among members.

Discussion of Requests to file and Amicus Brief in Perkins Coie Case (link)

General Counsel Laurie Powers provided background on requests for WSBA to file an amicus brief in *Perkins Coie LLP v. U.S. Department of Justice*. The case involves significant issues affecting the legal profession in Washington State. The Board debated whether to file at the trial or appellate level, with consensus leaning toward the appellate level for greater impact. Gov. Kari Petrasek moved to authorize the Executive Committee to prepare an amicus brief for the appellate level. The motion was seconded and passed unanimously. The Board also decided to redact and release a confidential memo that was provided to the Board in preparation for the discussion to ensure transparency while maintaining confidentiality of privileged information.

Governor Roundtable (link)

Chief Communication Officer Sara Niegowski gave an update on the Rule of Law Ambassador Program, emphasizing its role in promoting education and confidence in the legal profession. The program aims to launch on Law Day, May 1, with public events and a toolkit for ambassadors. Gov. Parvin Price proposed educational presentations on the U.S. Constitution for the Board and bar members, aligning with the ambassador program. Gov. Mary Rathbone raised concerns about the implementation of indigent defense standards, highlighting potential challenges in meeting attorney requirements in Grant County. The Board acknowledged the need for solutions and discussed forming an implementation committee.

Executive Session: Receive and Discuss Legal Advice (link)

President Anjilvel moved the Board to executive session at 1:25 p.m. to receive and discuss legal advice. The session concluded at 2:30 p.m., and the Board resumed the public session.

Gov. Couch moved to approve a recommendation 1A for a statement titled "Lawful and Necessary," affirming WSBA's commitment to promoting the rule of law and diversify the profession. The motion passed unanimously. Govs. Fay and Widney were not present for the vote.

Gov. Couch moved to approve a recommendation 1B of WSBA's guiding principle which includes core values that inform strategic goals and decision making. Motion passed unanimously. Govs. Fay and Widney were not present for the vote.

Gov. Couch moved to approve WSBA Board of Governors sign on in support of ABA rule of Law statement. Motion passed unanimously. Govs. Fay and Widney were not present for the vote.

During the public session, the Board of Governors discussed several recommendations from confidential materials. Nancy Hawkins expressed concern about a lack of transparency with respect to items taken up in Executive Session and Executive Director Nevitt responded.

Adjournment

There being no further business, President Anjilvel adjourned the meeting at 3:10 p.m. on Saturday, March 22, 2025.

Respectfully submitted,

Terra Nevitt WSBA Executive Director & Secretary



Board of Governors Meeting – Motions List Olympia, WA March 21-22, 2025

- 3. Motion to approve the Consent Calendar. Motion passed unanimously.
- 4. Motion to approve the governance committee charter as presented. Motion passed unanimously. Gov. Alain Villeneuve was not present for the vote.
- 5. Motion to authorize the Executive Committee to prepare an amicus brief for the appellate level in the Perkins Coie case. Motion passed unanimously.
- 6. Motion to approve Recommendation 1A for a statement titled "Lawful and Necessary," affirming WSBA's commitment to promoting the rule of law and diversifying the profession. Motion passed unanimously. Govs. Fay and Widney were not present for the vote.
- 7. Motion to approve Recommendation 1B of WSBA's guiding principle, which includes core values that inform strategic goals and decision making. Motion passed unanimously. Govs. Fay and Widney were not present for the vote.
- 8. Motion to approve WSBA Board of Governors sign-on in support of the ABA Rule of Law statement. Motion passed unanimously. Govs. Fay and Widney were not present for the vote.

то:	WSBA Board of Governors
CC:	Terra Nevitt, Executive Director
FROM:	Bailey Zydek, Juvenile Law Section Chain
DATE:	March 21, 2025
RE:	Amending Juvenile Law Section Bylaws

ACTION: The Juvenile Law Section is requesting that its bylaws be amended so that executive committee terms run from 1 year to 2 years, with co-chaired positions alternating the years in which co-chair positions are up for election. These proposed amendments also "clean up" scrivener's errors that were missed that last time the bylaws were edited (e.g., consistency in capitalization, consistency in the use of the term "chair").

Every executive committee (E.C.) position of the Juvenile Law Section currently runs on one-year terms. Additionally, all E.C. committees contemplate 2 co-chairs, which means every year the section is scrambling to find 2 people to fill vacant committee positions. The section has struggled to recruit interested applicants, so many positions are filled by appointment (with many more remaining vacant). Executive Committee members often complain that the section spends inordinate amounts of time working to fill positions and managing an annual election cycle. This, combined with the annual turnover of E.C. members and chronic vacancies means the section has not been able to devote sufficient attention to other section objectives. Having E.C. positions that run for twoyear terms, with co-chaired committees staggering the years in which the co-chair positions are up for election, would promote continuity within the section and allow the section to devote its time and energy to other projects and objectives.

To transition from one-year terms to two-year staggered terms for the committee co-chairs and at-large members, the following positions will only have a one-year term for FY2026, transitioning to two-year terms in FY27 and going forward:

- a. Co-Chair of Juvenile Justice Committee (Position 2 of 2)
- b. Co-Chair of Dependency and Child Welfare Committee (Position 2 of 2)
- c. Co-Chair of the Civil Legal Needs Committee (Position 2 of 2)
- d. Co-Chair of the Legislative Committee (Position 2 of 2)
- e. CLE Coordinator/Publication Editor
- f. One of two At-Large members (Position 2 of 2)

Background

I do not believe this request has ever come before the Board before, at least not from the Juvenile Law Section. We understand that other sections have their E.C. terms run for 2 years so believe there is a precedent among other sections. E.C. members jumped at this proposal when it was presented during a regular E.C. meeting and members have been eager to push this forward so that the bylaws may be in effect for the current election cycle. The E.C. approved a vote to amend these bylaws during a regularly scheduled section meeting on March 19, 2025.

Community Input

The E.C. has discussed this proposal at length during open section meetings where anyone in attendance had the opportunity to weigh in. We cannot identify any group who would be disadvantaged by extending term limits from 1 to 2 years and so have not engaged in additional community outreach.

Information for Fiscal Analysis

There should not be a fiscal impact associated with extending term limits from 1 to 2 years.

Information for Equity Analysis

Because this proposal strictly concerns amending the Juvenile Law Section's bylaws so that Executive Committee positions run on staggered two-year terms, no particular identity, institution, or group should be impacted. If anything, reducing turnover in the section and freeing up resources so the section may focus on section objectives other than filling vacant positions and managing elections would increase the section's ability to engage in activities that promote equity in juvenile law systems.

WSBA RISK ANALYSIS: This section is to be completed by the Office of General Counsel, with input from the proposing entity or individual.

Risk analysis submitted as part of confidential materials.

WSBA FISCAL ANALYSIS: This section is to be completed by the Finance Department, with input from the proposing entity or individual.

The fiscal impact to WSBA resulting from the proposed recommendation is primarily limited to the amount of staff time used to incorporate any approved bylaw revisions to relevant records. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and would not require additional staff or allocation of resources from other internal sources.

WSBA EQUITY ANALYSIS: This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.

The equity impacts of this proposal appear consistent with the considerations outlined in the memo. There do not appear to be any direct identity-based impacts of this bylaws change, though by reducing turnover and administrative burdens associated with annual elections, the section will be able to dedicate more time and resources to substantive juvenile law issues.

Attachments

JuvenileLawSectionProposedBylawsAmendments_2025_Clean.pdf JuvenileLawSectionProposedBylawsAmendments_2025_Redlined.pdf

JUVENILE LAW SECTION

Bylaws

As last amended and approved by the Washington State Bar Association Board of Governors on September 22, 2022.

ARTICLE 1 – GENERAL PROVISIONS

1.1 Section Name

The name of this section is the Juvenile Law Section (the "Section") of the Washington State Bar Association. This Section was established pursuant to the Bylaws of the Washington State Bar Association (the "Bar").

1.2 Purpose

The Section will provide a forum to discuss issues of concern and act as an agent of change to improve the law and practice related to civil and criminal matters involving children and youth in Washington State. This Section welcomes advocates from all interested disciplines and a variety of fields of law, including juvenile justice, child welfare and those who represent youth in civil legal practice.

The Section is concerned with all aspects of juvenile law and policy: dependency, offender, civil legal needs of youth and status offenses (children in need of services, youth at risk, and truants).

1.3 Principal Office

The principal office of the Section shall be maintained in the offices of the Bar.

1.4 Fiscal Year

The fiscal year of the Section shall coincide with that of the Bar, October 1 through September 30.

1.5 Section Subject to WSBA Bylaws

In accordance with WSBA Bylaws Article XI.E, the section is subject to all Bar Bylaws, policies, and procedures.

ARTICLE 2 – MEMBERSHIP

2.1 Enrollment and Membership

Any Active member in good standing with the Bar may be enrolled as a voting member of the Section upon request and payment of annual section dues. In addition, juvenile advocates who are not licensed

Juvenile Law Section

to practice law and law students may join as non-voting members ("subscribers") of the Section. Members enrolled as provided in this article shall constitute the membership of the Section.

2.2 Dues

Dues shall be paid annually in advance. Any person who fails to pay the annual dues shall cease to be a member of the Section. The section dues of law student members of the Executive Committee will be paid by the section during their tenure on the Executive Committee.

ARTICLE 3 – MEETINGS OF THE MEMBERSHIP

3.1 Annual Meeting

The Section shall hold an annual meeting of the membership.

3.2 Quorum

The voting members of the Section present at any meeting shall constitute a quorum for the transaction of business.

3.3 Controlling Vote

Action of the Section shall be by a majority vote of the voting members present.

3.4 Agenda

Among the business to be transacted at the annual meeting by the membership shall be to solicit members interested in serving as officers for the upcoming March to May election cycle, review the section financials, develop committee and project proposals and introduce any proposed bylaw changes for the upcoming year.

3.5 Robert's Rules of Order

The rules contained in the current edition of Robert's Rules of Order Newly Revised shall govern the meetings of the Section in all cases to which they are applicable and in which they are not inconsistent with these bylaws; the WSBA Bylaws, policies, and procedures; and any special rules of order as prescribed by the Washington State Bar Association. A failure to observe proper Robert's Rules of Order will not constitute an automatic default or reversal of action without a unanimous vote by the Executive Committee to void the action.

ARTICLE 4 – THE EXECUTIVE COMMITTEE

4.1 Duties

The Executive Committee shall undertake all duties necessary for the administration of the affairs of the Section including, without limitation, the power and duty to act on behalf of the Section in connection with sponsoring, supporting or opposing legislation; sponsoring and cosponsoring continuing legal education; approving the content of and publishing the Section newsletter; approving the content and maintenance of the Section website; the adoption of budget requests and approval of expenditures that comply with Bar fiscal policies and procedures; and shall perform duties assigned to it by the Board of Governors. The Executive Committee shall have the authority to establish and discontinue committees and subcommittees of the Section.

4.2 Composition

The membership of the Executive Committee is composed of the section's officers and other positions as Juvenile Law Section 2

described below:

- a. Chair;
- b. Chair-elect;
- c. Secretary;
- d. Treasurer;
- e. Two Co-Chairs of Juvenile Justice Committee;
- f. Two Co-Chairs of Dependency and Child Welfare Committee;
- g. Two Co-Chairs of the Civil Legal Needs Committee;
- h. Two Co-Chairs of the Legislative Committee;
- i. CLE Coordinator/Publication Editor;
- j. Immediate Past Chair;
- k. Two At-Large members;
- I. Young Lawyer Liaison; and

m. At least one law student representative from a Washington law school (term expires upon graduation from law school.) The law student member(s) do not have voting rights.

4.3 Voting Rights

All Executive Committee members have full voting rights, with the exception of any law school representatives.

4.4 Term

The term of each Executive Committee position shall be staggered pursuant to Section 7.4 Term of Office with Executive Committee positions serving two-year terms. Any vacancy filled pursuant to Section 7.3 of these bylaws shall only fill the unexpired two-year term.

4.5 Quorum and Controlling Vote

A majority of the voting members of the Executive Committee shall constitute a quorum. Actions of the Executive Committee shall be determined by a majority vote, once a quorum is established, of the voting members present in person, by telephone or by videoconferencing.

4.6 Meetings

The annual meeting of the Executive Committee shall be held in conjunction with the annual meeting of the Section. Special meetings may be held at the time and place designated by a Chair or a majority of the Executive Committee. Notice of all section meetings will be provided to all members and will be listed on the section's web page.

The Executive Committee will hold a monthly meeting on a schedule that will be developed at the beginning of each calendar year and published on the section's web page.

4.7 Removal

Any member of the Executive Committee may be removed by a two-thirds majority vote of the Executive Committee. Grounds for removal include, but are not limited to, regular absence from Executive Committee meetings and events, failure to perform duties, unprofessional or discourteous conduct or whenever, in the Executive Committee's judgment, the Executive Committee member is not acting in the best interest of the Section membership.

4.8 Law Student Participation

The Executive Committee may appoint at least one law student member to the Executive Committee. Juvenile Law Section

ARTICLE 5 – OFFICERS

5.1 Officers

The officers of the Section shall be the Chair, the Chair-Elect, the Secretary, and the Treasurer.

5.2 Chair

- a. The Chair shall preside at all meetings of the Section and shall appoint committee members as needed. The Chair shall have such other powers and perform such duties as usually pertain to this office consistent with WSBA and Section Bylaws.
- b. In the event the Chair anticipates a temporary inability to carry out the Chair's duties, the Chair may designate the Chair-Elect (or another member of the Section if the Chair-Elect is not available), to temporarily act as Chair in the Chair's absence.

5.3 Chair-Elect

Upon the death, resignation, or during the disability of the Chair, or upon his/her refusal to act, the Chair-Elect shall perform the duties of the Chair for the remainder of the Chair's disability and then only during so much of the term as the disability continues. The Chair-Elect shall succeed the outgoing Chair as the Chair for the next term of office.

5.4 Secretary

The Secretary will take minutes at each meeting of the Section and Executive Committee and provide approved minutes to the Bar for publication and record retention. Further, the Secretary will perform any additional duties incident to the office of Secretary as may be assigned by the Chair or the Executive Committee, consistent with the Bar's policies and procedures. The role of Secretary and Treasurer may be held by the same member of the Section if one of the two positions is vacant.

5.5 Treasurer

The Treasurer shall be responsible for maintaining financial records for the Section, communicating with the WSBA and other organizations on financial matters, reporting to the Section on its financial position, shall draft a proposed budget each year for Executive Committee approval and submission to the WSBA for approval, shall review the financial statements to the extent provided by the WSBA for accuracy and provide any corrections to the WSBA, and shall perform such other duties as may be delegated by the Executive Committee. The Treasurer shall work with the WSBA to ensure compliance with fiscal policies and procedures. The role of Secretary and Treasurer may be held by the same member of the Section if one of the two positions is vacant.

ARTICLE 6 – COMMITTEES AND SUBCOMMITTEES

6.1 Juvenile Justice Committee

There shall be a juvenile justice committee composed of Co-Chairs and other members of the section who are willing to serve on the committee.

6.2 Child WelfareCommittee

There shall be a child welfare committee composed of Co-Chairs and other members of the section who are willing to serve on the committee.

6.3 Civil Legal NeedsCommittee

Juvenile Law Section

There shall be a civil legal needs committee composed of Co-Chairs and other members of the section who are willing to serve on the committee.

6.4 Legislative Committee

There shall be a legislative committee composed of two Co-Chairs and other members who are willing to serve on the committee.

6.5 Purpose

The purpose of the committees shall be to further the interests of the Section within their particular areas of expertise in coordination with the Chairs and subject to control of the Executive Committee. Subcommittees and task forces, as constituted from time to time by the Executive Committee, shall be filled by appointment by the Section Co-Chairs of a Subcommittee or Project Chair with the consent of the Executive Committee. Committee Co-Chairs are elected by the Section and serve as officers of the Section.

ARTICLE 7 – ELECTIONS AND APPOINTMENTS

7.1 Elections

Nominations and elections will occur within timeframes consistent with WSBA bylaws, subject to the schedule identified in Section 7.4. The Bar will administer the elections by electronic means and certify the results, unless the Section develops its own equivalent electronic election process. In the event of a tie, the winner will be determined by a coin toss.

7.2 Nominations

The Chair shall solicit nominations from the Section membership and appoint a nominating committee of not less than three members of the Section, at least one of whom shall not be a current member of the Executive Committee. The nominating committee shall verify qualifications of nominees and solicit additional nominations when appropriate. All applicants will apply through an electronic application process administered by the Bar. In selecting its nominees, it shall be the responsibility of the nominating committee to bear in mind the need for broad representation on the Executive Committee, based on geography, diversity of practice, special expertise, and other factors of diversity. It shall be the responsibility of the nominating committee to contact each member nominated and verify her or his willingness to accept the nomination, and to generally describe the commitment involved in the position to the nominee. Nothing prevents a Section member from self-nominating. The Executive Committee will also have an alternative process to allow for nominations to occur outside the nominating committee process. The Executive Committee will approve a list of nominees for each open position.

7.3 Vacancy

Vacancy of any position on the Executive Committee shall be filled by appointment by a majority vote of the Executive Committee. When a member is appointed to fill a vacancy in an unexpired term, the member will do so until the next annual election when an individual will be elected to serve the remainder of the vacated term.

7.4 Term of Office

The following Executive Committee positions shall serve two-year terms beginning October 1st on odd numbered years:

- a. Chair
- b. Chair-elect

Juvenile Law Section

- c. Secretary
- d. Treasurer
- e. Co-Chair of Juvenile Justice Committee (Position 1 of 2)
- f. Co-Chair of Dependency and Child Welfare Committee (Position 1 of 2)
- g. Co-Chair of the Civil Legal Needs Committee (Position 1 of 2)
- h. Co-Chair of the Legislative Committee (Position 1 of 2)
- i. One of two At-Large members (Position 1 of 2)
- j. Young Lawyer Liaison

The following Executive Committee positions shall serve two-year terms beginning October 1st on even numbered years:

- a. Co-Chair of Juvenile Justice Committee (Position 2 of 2)
- b. Co-Chair of Dependency and Child Welfare Committee (Position 2 of 2)
- c. Co-Chair of the Civil Legal Needs Committee (Position 2 of 2)
- d. Co-Chair of the Legislative Committee (Position 2 of 2)
- e. CLE Coordinator/Publication Editor
- f. One of two At-Large members (Position 2 of 2)

ARTICLE 8 – PUBLICATIONS AND WEBSITE

8.1 Newsletter

There may be published and furnished to members of the Section, and to such other persons or organizations as the Executive Committee may determine, an electronic newsletter published at such intervals as the Executive Committee shall determine.

8.2 Other Publications

The Section may publish a series of programs or other written material to further the objectives of the Section.

8.3 Website

The Executive Committee will provide content to the section's web page subject to Bar review and approval.

ARTICLE 9 – AMENDMENTS

9.1 Amendments

These bylaws may be amended at any annual meeting of the Section by a majority vote of the voting members of the Section present and voting, or at an Executive Committee meeting by a majority vote of the voting Executive Committee members once a quorum is established, provided that no amendment shall become effective until approved by the Board of Governors of the Bar.

Approved by the Bar Board of Governors on June 9, 2006, and as first amended and approved by the Bar Board of Governors on March 7, 2008, and further amended and approved by the Bar Board of Governors on March 5, 2010, and further amended and approved by the Bar Board of Governors on October 28, 2011, and further amended and approved by the Bar Board of Juvenile Law Section 6

Governors on July 27, 2017, and further amended and approved by the Bar Board of Governors on September 22, 2022.

JUVENILE LAW SECTION

Bylaws

As last amended and approved by the Washington State Bar Association Board of Governors on September 22, 2022.

ARTICLE 1 – GENERAL PROVISIONS

1.1 Section Name

The name of this section is the Juvenile Law Section (the "Section") of the Washington State Bar Association. This Section was established pursuant to the Bylaws of the Washington State Bar Association (the "Bar").

1.2 Purpose

The Section will provide a forum to discuss issues of concern and act as an agent of change to improve the law and practice related to civil and criminal matters involving children and youth in Washington State. This Section welcomes advocates from all interested disciplines and a variety of fields of law, including juvenile justice, child welfare and those who represent youth in civil legal practice.

The Section is concerned with all aspects of juvenile law and policy: dependency, offender, civil legal needs of youth and status offenses (children in need of services, youth at risk, and truants).

1.3 Principal Office

The principal office of the Section shall be maintained in the offices of the Bar.

1.4 Fiscal Year

The fiscal year of the Section shall coincide with that of the Bar, October 1, through September 30.

1.5 Section Subject to WSBA Bylaws

-In accordance with WSBA Bylaws Article XI.E, the section is subject to all Bar Bylaws, policies, and procedures.

ARTICLE 2 – MEMBERSHIP

2.1 Enrollment and Membership

Any Active member in good standing with the Bar may be enrolled as a voting member of the Section upon request and payment of annual section dues. In addition, juvenile advocates who are not licensed

Juvenile Law Section

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to practice law and law students may join as non-voting members ("subscribers") <u>of</u> the Section. Members enrolled as provided in this article shall constitute the membership of the Section.

2.2 Dues

Dues shall be paid annually in advance. Any person who fails to pay the annual dues shall cease to be a member of the Section. The section dues of law student members of the Eexecutive Ceommittee will be paid by the section during their tenure on the Eexecutive Ceommittee.

ARTICLE 3 – MEETINGS OF THE MEMBERSHIP

3.1 Annual Meeting

The Section shall hold an annual meeting of the membership.

3.2 Quorum

The voting members of the Section present at any meeting shall constitute a quorum for the transaction of business.

3.3 Controlling Vote

Action of the Section shall be by a majority vote of the voting members present.

3.4 Agenda

Among the business to be transacted at the annual meeting by the membership shall be to solicit members interested in serving as officers for the upcoming March to May election cycle, review the section financials, develop committee and project proposals and introduce any proposed by-law changes for the upcoming year.

3.5 Robert's Rules of Order

The rules contained in the current edition of Robert's Rules of Order Newly Revised shall govern the meetings of the Section in all cases to which they are applicable and in which they are not inconsistent with these bylaws; the WSBA Bylaws, policies, and procedures; and any special rules of order as prescribed by the Washington State Bar Association. A failure to observe proper Robert's Rules of Order will not constitute an automatic default or reversal of action without a unanimous vote by the Eexecutive Ceommittee to void the action.

ARTICLE 4 – THE EXECUTIVE COMMITTEE

4.1 Duties

The Eexecutive Ceommittee shall undertake all duties necessary for the administration of the affairs of the Section including, without limitation, the power and duty to act on behalf of the. Section in connection with sponsoring, supporting or opposing legislation; sponsoring and cosponsoring continuing legal education; approving the content of and publishing the Section newsletter; approving the content and maintenance of the Section website; the adoption of budget requests and approval of expenditures that comply with Bar fiscal policies and procedures; and shall perform duties assigned to it by the Board of Governors. The Eexecutive Ceommittee shall have the authority to establish and discontinue committees and subcommittees of the Section.

4.2 Composition

The membership of the <u>E</u>executive <u>C</u>eommittee is <u>comprised composed</u> of the section's officers and other Juvenile Law Section 2

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positions as described below:

- a. Chair;
- b. Chair-elect;
- c. Secretary;
- d. Treasurer;
- e. Two Co-ChairsDirectors of Juvenile Justice-Committee;
- f. Two Co-ChairsDirectors of Dependency and Child Welfare Committee;
- g. Two Co-ChairsDirectors of the Civil Legal Needs Committee;
- h. Two Co-ChairsDirectors of the Legislative Committee;
- i. CLE Coordinator/Publication Editor;
- j. Immediate Past Chair;
- k. Two At-Large members; and
- I. Young Lawyer Liaison; and

m. At least one law student representative from a Washington law school (term expires upon graduation from law school.) The law student member(s) do not have voting rights.

4.3 Voting Rights

All <u>E</u>executive <u>C</u>ecommittee members have full voting rights, with the exception of any law school representatives.

4.4 Term

The term of each position on the executive committee shall be one year and begin on October 1 eachyear.

The term of each Executive Committee position shall be staggered pursuant to Section 7.4 Term of Office with Executive Committee positions serving two--year terms. Any vacancy filled pursuant to Section 7.3 of these bylaws shall only fill the unexpired two-year term.

4.5 Quorum and Controlling Vote

A majority of the voting members of the Eexecutive Ceommittee shall constitute a quorum. Actions of the Eexecutive Ceommittee shall be determined by a majority vote, once a quorum is established, of the voting members present in person, by telephone or by videoconferencing.

4.6 Meetings

The annual meeting of the Eexecutive Ceommittee shall be held in conjunction with the annual meeting of the Section. Special meetings may be held at the time and place designated by a Chair or a majority of the Eexecutive eCommittee. Notice of all section meetings will be provided to all members and will be listed on the section's web page.

The <u>E</u>executive <u>C</u>eommittee will hold a monthly <u>telephone</u> meeting on a schedule that will be developed at the beginning of each calendar year and published on the section's web page.

4.7 Removal

Any member of the <u>E</u>executive <u>C</u>eommittee may be removed by a two-thirds majority vote of the <u>E</u>executive <u>C</u>eommittee. Grounds for removal include, but are not limited to, regular absence from <u>E</u>executive <u>C</u>eommittee meetings and events, failure to perform duties, unprofessional or discourteous conduct or whenever, in the <u>E</u>executive <u>C</u>eommittee's judgment, the <u>E</u>executive <u>C</u>eommittee member is

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Juvenile Law Section

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not acting in the best interest of the Section membership.

4.8 Law Student Participation

The <u>Eexecutive C</u>committee <u>mayshall</u> appoint at least one law student member to the <u>Eexecutive C</u>committee.

ARTICLE 5 – OFFICERS

5.1 Officers

The officers of the Section shall be the Chair, the Chair-Elect, the Secretary, and the Treasurer.

5.2 Chair

- a. The Chair shall preside at all meetings of the Section and shall appoint committee members as needed. The Chair shall have such other powers and perform such duties as usually pertain to this office consistent with WSBA and Section Bylaws.
- b. In the event the Chair anticipates a temporary inability to carry out the Chair's duties, the Chair may designate the Chair-Elect (or another member of the Section if the Chair-Elect is not available), to temporarily act as Chair in the Chair's absence.

5.3 Chair-Elect

Upon the death, resignation, or during the disability of the Chair, or upon his/her refusal to act, the Chair— <u>- E</u>elect shall perform the duties of the Chair for the remainder of the Chair's disability and then only during so much of the term as the disability continues. The Chair-<u>E</u>elect shall succeed the outgoing Chair as the Chair for the next term of office.

5.4 Secretary

The Secretary will take minutes at each meeting of the Section and Eexecutive Ceommittee and provide approved minutes to the Bar for publication and record retention. Further, the Secretary will perform any additional duties incident to the office of Secretary as may be assigned by the Chair or the Eexecutive Ceommittee, consistent with the Bar's policies and procedures. The role of Secretary and Treasurer may be held by the same member of the Section if one of the two positions is vacant.

5.5 Treasurer

The Treasurer shall be responsible for maintaining financial records for the Section, communicating with the WSBA and other organizations on financial matters, reporting to the Section on its financial position, shall draft a proposed budget each year for Executive Committee approval and submission to the WSBA for approval, shall review the financial statements to the extent provided by the WSBA for accuracy and provide any corrections to the WSBA, and shall perform such other duties as may be delegated by <u>the</u>. Executive Committee. The Treasurer shall work with the WSBA to ensure compliance with fiscal policies and procedures. The role of Secretary and Treasurer may be held by the same member of the Section if one of the two positions is vacant.

ARTICLE 6 – COMMITTEES AND SUBCOMMITTEES

6.1 Juvenile Justice Committee

There shall be a juvenile justice committee comprised composed of Co-ChairsDirectors and other

Juvenile Law Section

members of the section who are willing to serve on the committee.

6.2 Child WelfareCommittee

There shall be a child welfare committee composed of Co-<u>ChairsDirectors</u> and other members of the section who are willing to serve on the committee.

6.3 Civil Legal NeedsCommittee

There shall be a civil legal needs committee composed of Co-<u>ChairsDirectors</u> and other members of the section who are willing to serve on the committee.

6.4 Legislative Committee

There shall be a legislative committee composed of <u>one or two <u>Co-Chairs-Directors</u> and other members who are willing to serve on the committee.</u>

6.5 Purpose

The purpose of the committees shall be to further the interests of the Section within their particular areas of expertise in coordination with the Chairs and subject to control of the <u>Eexecutive C</u>ecommittee. Subcommittees and task forces, as constituted from time to time by the Eexecutive

<u>C</u>committee, shall be filled by appointment by the Section Co-Chairs of a Subcommittee or Project Chair with the consent of the <u>E</u>executive <u>C</u>committee. Committee Co-Chairs are elected by the Section and serve as officers of the Section.

ARTICLE 7 – ELECTIONS AND APPOINTMENTS

7.1 Elections

7.1 Nominations and elections for open executive committee positions will be held between March and May each year. The Bar will administer the elections by electronic means and certify the results, unless the Section develops its own equivalent electronic election process. In the event of a tie, the winner will be determined by a coin toss.

Nominations and elections will occur within timeframes consistent with WSBA bylaws, subject to the schedule identified in Section 7.4. The Bar will administer the elections by electronic means and certify the results, unless the Section develops its own equivalent electronic election process. In the event of a tie, the winner will be determined by a coin toss.

7.2 Nominations

The Chair shall solicit nominations from the Section membership and appoint a

_nominating committee of not less than three members of the Section, at least one of whom shall not be a current member of the Eexecutive Ceommittee. The nominating committee shall verify qualifications of nominees and solicit additional nominations when appropriate. All applicants will apply through an electronic application process administered by the Bar. In selecting its nominees, it shall be the responsibility of the nominating committee to bear in mind the need for broad representation on the Eexecutive Ceommittee, based on geography, diversity of practice, special expertise, and other factors of diversity. It shall be the responsibility of the nominating committee to contact each member nominated and verify her or his willingness to accept the nomination, and to generally describe the commitment involved in the position to the nominee. Nothing prevents a Section member from self-nominating. The Eexecutive Ceommittee will also have an alternative process to allow for nominations to occur outside the nominating committee process. The Eexecutive Ceommittee will approve a list of nominees for each open

Juvenile Law Section

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position.

7.3 Vacancy

Vacancy of any position on the <u>E</u>executive <u>e</u>Committee shall be filled by appointment by a majority vote of the <u>E</u>executive <u>C</u>eommittee. When a member is appointed to fill a vacancy in an unexpired term, the member will do so until the next annual election when an individual will be elected to serve the remainder of the vacated term.

7.4-Term of Office

7.4 All executive committee positions will begin October 1 each year.

The following Executive Committee positions shall serve two-year terms beginning October 1st on odd numbered years:

- a. Chair
- b. Chair-elect
- c. Secretary
- d. Treasurer
- e. Co-Chair of Juvenile Justice Committee (Position 1 of 2)
- f. Co-Chair of Dependency and Child Welfare Committee (Position 1 of 2)
- g. Co-Chair of the Civil Legal Needs Committee (Position 1 of 2)
- h. Co-Chair of the Legislative Committee (Position 1 of 2)
- i. One of two At-Large members (Position 1 of 2)
- j. Young Lawyer Liaison

<u>-The following Executive Committee positions shall serve two-year terms beginning October 1st on even</u> <u>
numbered years:</u>

a. Co-Chair of Juvenile Justice Committee (Position 2 of 2)

- b. Co-Chair of Dependency and Child Welfare Committee (Position 2 of 2)
- c. Co-Chair of the Civil Legal Needs Committee (Position 2 of 2)
- d. Co-Chair of the Legislative Committee (Position 2 of 2)
- e. CLE Coordinator/Publication Editor

f. One of two At-Large members (Position 2 of 2)

ARTICLE 8 – PUBLICATIONS AND WEBSITE

8.1 Newsletter

There <u>mayshall</u> be published and furnished to members of the Section, and to such other persons or organizations as the <u>E</u>executive <u>C</u>eommittee may determine, an electronic newsletter published at such intervals as the <u>E</u>executive <u>C</u>eommittee shall determine.

8.2 Other Publications

The Section may publish a series of programs or other written material to further the objectives of the Section.

8.3 Website

The Eexecutive Ceommittee will provide content to the section's web page subject to Bar review and

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Juvenile Law Section

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approval.

ARTICLE 9 – AMENDMENTS

9.1 Amendments

These bylaws may be amended at any annual meeting of the Section by a majority vote of the voting members of the Section present and voting, or at an <u>E</u>executive <u>C</u>eommittee meeting by a majority vote of the voting <u>E</u>executive <u>C</u>eommittee members once a quorum is established, provided that no amendment shall become effective until approved by the Board of Governors of the Bar.

Approved by the Bar Board of Governors on June 9, 2006, and as first amended and approved by the Bar Board of Governors on March 7, 2008, and further amended and approved by the Bar Board of Governors on March 5, 2010, and further amended and approved by the Bar Board of Governors on October 28, 2011, and further amended and approved by the Bar Board of Governors on July 27, 2017, and further amended and approved by the Bar Board of Governors on September 22, 2022.

Juvenile Law Section

- TO: WSBA Board of Governors
- FROM: Sunitha Anjilvel, WSBA President
- RE: 2024-2025 Chair Appointment
- DATE: April 9, 2025

Consent: Appointment of the Pro Bono & Public Service Committee Co-Chair

The WSBA has a number of standing committees that are created and authorized by the BOG to study matters relating to the general purposes and business of the Bar which are of a continuous and recurring character. Pursuant to the WSBA Bylaws, IX(B)(1)(c), the President-elect annually selects the Chair or Vice Chair of each committee, with the BOG having the authority to accept or reject that selection. Below is the slate of WSBA committee co-chair for the remainder of 2024-2025 year and the 2025-2026 year.

Committee/Board	Recommended for Appointment
Pro Bono and Public Service Committee	Co-Chair: Evangeline Stratton Term: Upon appointment – 9.30.2026

March 26, 2025

- TO: WSBA leadership
- RE: WSBA Pro Bono & Public Service Committee Co Chair position

To Whom It May Concern:

My name is Evangeline Stratton, and I'm a member in good standing of the WSBA. I have been a member of the Pro Bono & Public Service committee for over two years. I am currently in my second, two-year term. I would like to be considered for the open Co-Chair position, alongside Andy Dugan.

Until recently, I was the Senior Managing Attorney at Family Violence Appellate Project Washington. Due to insufficient funding, we had to close our Washington office on January 25, 2025. However, I remain committed to furthering *pro bono publico* service in our state, and to the work of the committee. I've personally engaged in pro bono work since the beginning of my legal career in 2010.

I've enclosed a copy of my resume.

Thank you for your consideration,

Elangline Houton Evangeline Stratton, JD (she/her)

WSBA #43038

Evangeline Stratton (she/her)

EDUCATION and MEMBERSHIPS

William Mitchell College of Law

(Mitchell Hamline), St. Paul, MN *Juris Doctor*, magna cum laude, May 2010

Seattle University School of Law, Seattle, WA Visiting Student, August 2009-May 2010

Minnesota State University, Mankato, MN

Master of Science Gender & Women's Studies, July 2009 Thesis: Theorizing an Indigenous Jurisprudence of Rape Warren Wilson College, Asheville, NC Bachelor of Arts Human Studies: Sociology, May 2001

Washington State Bar Association Member, #43038

King County Bar Association (Washington), Member

PROFESSIONAL

Family Violence Appellate Project, Washington

Senior Managing Attorney, March 2021 to January 2025

- Represent survivors of intimate partner violence and gender-based violence pro bono in civil appeals
- Actively solicit pro bono co-counsel for appellate representations in direct appeals and amicus briefs
- Provide technical assistance on appellate practice to unrepresented litigants, advocates, and attorneys
- Develop Washington program infrastructure
- Legislative and public policy advocacy for survivors in Washington State

JustLead Washington, Leadership Academy

Fellow, Cohort 8, September 2021-April 2022

• Engage in collaborative learning to build leadership skills to work towards equity and justice with low-income and marginalized individuals and communitties in Washington State.

Stratton Legal, PLLC, Seattle, WA

Legal Consultant, November 2020 to March 2021

- Advise attorneys on procedure and strategy in domestic violence and family law cases.
- Collaborate with community-based advocacy organizations and legal nonprofits.

Anderson, York & Stratton, PC, Seattle, WA

Partner, June 2016 to October 2020

- Represented low bono clients and survivors of domestic violence in family law, protection orders, administrative, civil, and appellate matters.
- Supervised associate attorneys and staff.
- Led business growth and development.
- Networked with community-based advocacy organizations and legal nonprofits.

Simmons Law Office, Seattle, WA

Attorney/Owner, May 2011 to June 2016

- Represented low bono clients and survivors of domestic violence in family law and protection order matters.
- Managed business growth and development.

Legal Voice, Seattle, WA

Law Clerk; Legal Information & Referral Line, 2010 to 2011

- Conducted legal research and draft memoranda for impact litigation relating to civil litigation and legislation.
- Fielded calls and made referrals on legal issues including family law, housing, discrimination, and domestic violence.

ASSOCIATIONS and WORK GROUPS

Washington State Bar Association, Pro Bono & Public Service Committee

Member, 2022 to present

Washington State Supreme Court Gender and Justice Commission, Legislative Crime Victim Services Workgroup Member, September 2023 to present

Washington State Women's Commission Safety Committee,

Volunteer Member, Jan. 2022 – present

Access To Justice Board, Delivery of Services Subcommittee, Member, 2021present

Coalition Ending Gender Based Violence, Family Law Workgroup Member, 2018-Present

Legal Voice, Violence Against Women Workgroup, Member, 2011 to 2020

<u>Technology Enabled Coercive</u> <u>Control (TECCI).</u> Member/Judicial Sub-committee, 2019-202

PUBLICATIONS

Publication Co-Author, 2015 "Domestic Violence Manual for Judges, Appendix H, "Abusive Litigation and Domestic Violence Survivors" Publication Co-Author, 2020 & 2021 <u>"Domestic Violence Protection Order</u> <u>Case Law in Washington State"</u>

PRESENTATIONS

Pierce County Domestic Violence Symposium for Dependency Stakeholders, *Co-Presenter* "Purple Roundtable" (2023)

Washington State Coalition Against Domestic Violence, Annual Conference, *Co-Presenter* "Abusive Litigation 2.0" (2022)

Washington Defenders Association, Virtual *Presenter* "Strengthening Advocacy for Survivors" (2022)

Washington state Superior Court Judges Association, Virtual Co-Presenter, "Improving Judicial Response to Unrepresented Litigants" (2022)

Washington State Coalition Against Domestic Violence, Legal Advocacy Series, Virtual *Presenter*, "How to Lay a Record for Appeal" (2021)

Washington State Coalition Against Domestic Violence, Annual Conference, Virtual Co-Presenter, "Family Law Advocacy for Non-Attorneys" (2021) **Domestic Violence Symposium, Seattle University School of Law,** Seattle, WA *Co-Presenter*, "Domestic Violence Protection Orders: 201" (2018)

Domestic Violence Symposium, Seattle University School of Law, Seattle, WA *Co-Presenter*, "Alternative Facts: Cutting Through the Misinformation about Domestic Violence" (2017)

Eastside Legal Assistance Program, CLE series, Seattle, WA *Presenter*, "Parenting Plans" (2017)

Washington State Bar Association, New Lawyers Education Program, Seattle, WA *Co-presenter*, "Domestic Violence Protection Orders" and "Temporary Family Law Orders" (2015)

PRO BONO

Sexual Violence Law Center, Seattle, WA Board Member, 2019-2024

Eastside Legal Assistance Program, Bellevue, WA *Board Member*, 2012-2018

King County Bar Association, Seattle, WA Pro Bono Family Law Clinic, 2012-2013 Pro Bono Attorney/Mentee, 2010 to 2011 Pro Bono Attorney/Mentor, 2019 to 2020 Kids in Need of Defense (KIND), Seattle, WA Pro Bono Attorney, 2010-2011

Immigrant Families Advocacy Project

(IFAP) Northwest Immigrant Rights Project & University of Washington School of Law, Seattle, WA Pro Bono Attorney, 2011-2012

TO: WSBA Board of Governors

FROM: Ling Zhuang, Chair, WSBA Judicial Recommendation Committee; Sanjay Walvekar, Staff Liaison to the Judicial Recommendation Committee

CC: Terra Nevitt, Executive Director

DATE: April 7, 2025

RE: WSBA Judicial Recommendation Committee March 2025 Interviews and Recommendations

ACTION: Approve the recommendations of the WSBA Judicial Recommendation Committee.

The WSBA Judicial Recommendation Committee met via Zoom on March 13 and March 27, 2025 for the purpose of conducting interviews with four individuals interested in being considered for openings on the Washington State Court of Appeals. Per committee guidelines approved by the Board of Governors, the proceedings and records of the committee, including applicant names, committee discussions, and committee votes, are kept strictly confidential. The committee's recommendations are available in the Governor's materials via the WSBA cloud-sharing service.

TO:	Board of Governors
FROM:	Terra Nevitt, Executive Director
	Paris Eriksen, Manager of Volunteer Engagement
DATE:	April 9, 2025
RE:	WSBA President-elect Candidate Interview & Selection Process

<u>ACTION</u>: Elect one candidate to the 2025-2026 President-elect officer position of the Board of Governors, for a one-year term beginning upon the incumbent President-elect becoming President.

This year, the WSBA received one applicant submission for the President-elect officer position on the WSBA Board of Governors; Kari Petrasek, whose candidate materials follow this memo.

Interview Process:

While we recognize there is only one applicant, it is organizational practice for uncontested candidates for president-elect to be interviewed and formally elected by the Board of Governors. To that end, the candidate interview will take place the morning of Friday, May 2. The candidate will be interviewed in public session and permitted fifteen minutes total for self-introduction and to answer questions. Governors may use the pool of interview questions provided but are not limited to these questions and may ask others should time permit.

Voting Process:

Given the hybrid meeting environment, this election will be conducted through an secret electronic ballot. After the interview, Board members will be asked to indicate their choice through the e-ballot. All votes will be secret and made available only to three persons appointed by the President, one of which is the Executive Director. Results will be announced immediately following the election.

Relevant WSBA Bylaws:

D. ELECTIONS BY BOARD OF GOVERNORS

1. Office of President-Elect.

The BOG will elect an Active lawyer member of the Washington State Bar Association to serve as President-elect. The election shall take place during a BOG meeting not later than the 38th week of each fiscal year, and will be by secret written ballot. The President-elect will take office upon the incumbent President-elect becoming President or upon vacancy of the office of President-elect.

If at the time of election, no President-elect in the preceding three years was an individual whose primary place of business was located in Eastern Washington, the President-elect must be an individual whose primary place of business is located in Eastern Washington. For purposes of these Bylaws, "Eastern Washington" is defined as that area east of the Cascade mountain range generally known as Eastern Washington. In any year where the Presidentelect must be an individual from Eastern Washington and no qualifying application is received within the timeframe allowed, the President will advise the BOG, and the BOG, at any regular meeting or special meeting called for that purpose, will establish procedures to re-open and extend the application period or otherwise address the issue. Such action by the BOG may include waiver of any geographic limitation for the year in question.

3. Election Procedures

Elections of At Large Governors, President and President-elect elections, and any other elections held by the BOG under these Bylaws, except elections for the position of Treasurer, are conducted as follows:

- a. Notice of the position will be advertised in the Bar's official publication and on the Bar's website no less than 30 days before the filing deadline and must include the closing date and time for filing candidate applications.
- *b.* Following expiration of the closing date and time identified, all candidate names will be posted publicly.
- *c.* The BOG may appoint a committee to recommend candidates to the BOG from all who have submitted their applications for a position in a timely manner.
- d. All recommended candidates, or others as determined at the discretion of the BOG, will be interviewed in public session of the BOG's meeting. Candidates who are competing for the same position must not be present for each other's interviews.
- *e.* Discussion of the candidates will be in public session but candidates will be asked by the President not to be present.
- *f.* Election of candidates will be conducted by secret written ballot.
- g. If no candidate for a given position receives a majority of the votes cast, the two candidates receiving the highest number of votes will be voted on in a run-off election. In the event of a tie for the second highest vote total, all candidates who are tied will participate in the run-off election along with the candidate who received the most votes. The candidate with the most votes in the run-off will be deemed the winner.
- *h.* Ballots will be tallied by three persons designated by the President, one of whom will be the Executive Director.
- *i.* Proxy votes are not allowed; however, a Governor who participated in the interview and discussion process by electronic means may cast a vote telephonically via a confidential phone call with the Executive Director and the other persons designated by the President to count the ballots.
- *j.* The elected candidate will be announced publicly following the vote. However, the vote count will not be announced and all ballots will be immediately sealed to both the BOG and the public and remain in the custody of the Executive Director for 90 days, when they will be destroyed.

Attachments:

Pool of Interview Questions Kari Petrasek, candidate materials



April 4, 2025

WSBA Board of Governors Washington State Bar Association 1325 Fourth Avenue, Suite 600 Seattle, WA 98101-2539 *barleaders@wsba.org*

Re: Letter of Interest to Serve as WSBA President-Elect

My fellow Governors:

I am writing to indicate my interest in serving as the Washington State Bar Association ("WSBA") President-Elect. In 2022, I was elected to be the Governor for District 2 and last year, I was chosen by you to serve as the WSBA Treasurer. In this role and while serving on the Budget & Audit Committee for three years, I have worked closely with all current and former Board of Governors members. I have served in this role and as District 2 Governor responsibly and with honor. Ensuring our profession's integrity and continuing to ensure justice for all is why I am applying to serve as WSBA President-Elect.

As the WSBA Treasurer, I have worked closely with WSBA Director of Finance, Tiffany Lynch, and have reviewed our fiscal policy and most recent audit report in great detail. I have ensured that the Budget & Audit committee has worked prudently, and that we maintain transparency to our members in the actions we have taken, particularly in light of the dues increase and license fee philosophy.

When running for my District 2 position, I told my constituents that we need to keep open lines of communication and keep meetings open to the entire membership in a transparent fashion, keep the organization fiscally responsible, and continue to work on our collaborative and productive relationship with the Supreme Court in ever improving the regulations that govern our practices. As President-Elect, I will do my part to keep the lines of communication open, keep meetings open in a transparent fashion, and continue to work with the Supreme Court in a collaborative way.

Technology is ever changing and so incredibly important to the future of our legal profession, both in terms of how lawyers use AI and other technology ethically as well as accessibility to technology for our members and the public. This is especially true given that there

Kari M. Petrasek, Attorney at Law

11700 Mukilteo Speedway, Suite 201-1006, Mukilteo, WA 98275 • 425.361.7699 • kari@petraseklaw.com

have been important initiatives, task forces, councils, and committees formed over the past few years.

Member wellbeing and wellness in our profession is also of great concern to me. I will continue to ensure that wellness remains a top priority for WSBA. Getting lawyers to work in rural areas is also of great importance and concern. Finding ways to support our public-sector colleagues who are working multiple positions because their office is short-staffed is critical. Continuing the fantastic work of the STAR council is also of utmost importance.

In the current world we live in, ensuring equity and justice, and protecting the rule of law, and defending every lawyer's right to practice where they want and to represent who they want is of paramount importance; while we can advocate towards those ends, this can only be done hand in hand with maintaining an independent judiciary.

I am appreciative of the dedication and wonderful work that the Diversity, Equity and Inclusion Council has done in creating the Equity and Justice Plan. Rolling out the action items will be very important in the coming years. As someone who is not in King County, I am cognizant of the challenge it is to reach people outside of the King County area. It is of great importance to me to ensure that the programs we create, implement, and/or host are available and relevant for everyone across the State.

I have no doubt that the WSBA will face a myriad of issues related to current issues we know about, as well as new issues still to be determined. I have chaired many boards and committees throughout my career; throughout my time as a leader, I have always been someone who is dependable and dedicated, someone who gets things done and is collaborative, and someone who is very interested in the fiscal health of boards I have served on. It is my sincere belief that I am the best candidate, with a demonstratable track record of fiscal responsibility, giving back to the community, and working successfully to bridge divides.

In summary, I respectfully ask that you vote for me as your next WSBA President-Elect. I will listen to you and am committed to professionalism and principled examination of the issues. It would be a great honor to serve in this important position. Thank you for your consideration.

Very truly yours,

Kaulau

Kari M. Petrasek District 2 Governor/WSBA Treasurer

KARI PETRASEK 11700 Mukilteo Speedway, Suite 201-1006 Mukilteo, WA 98275 (425) 361-7699 kari@petraseklaw.com

LEGAL EXPERIENCE

Snohomish County Superior Court, Everett, WA

Superior Court Judge and Commissioner Pro Tempore January 2010 – present Preside over trials and hearings relating to ITA cases, juvenile offender matters, truancies, at-riskyouth, children in need of services, probation violations, domestic relations, and civil cases. Attend pro tempore trainings when offered.

Petrasek Law, PLLC, Mukilteo, WA

Owner. *Attornev*

January 2015 – present

Represent clients almost daily in juvenile law matters, including dependency and termination proceedings, and court-appointed Guardian ad Litem cases at Snohomish County Juvenile Court. Represent the Snohomish County Volunteer Guardian ad Litem program in hearings and trials as needed. Appear in Superior Court for various civil litigation hearings and trials, including family law, elder law, and guardianship cases. Meet with clients and draft documents in estate planning cases. Court hearings involve all stages of the case from preliminary/show-cause hearings and discovery conferences, to contested review hearings or motion hearings, and eventually settlement negotiations or trial. Represent clients in arbitrations and mediations.

Carson Law Group, P.S., Everett, WA

Attornev December 2007 – December 2014 Represented clients almost daily in juvenile law matters, including dependency and termination proceedings, and court-appointed Guardian ad Litem cases at Snohomish County Juvenile Court. Represent the Snohomish County Volunteer Guardian ad Litem program in hearings and trials as needed. Appear in Superior Court for various civil litigation hearings and trials, including family law, guardianships, business law, collection, property, landlord-tenant cases, and domestic violence cases. Represent clients in criminal hearings and trials at District Court and handle estate planning cases. Court hearings involve all stages of the case from preliminary/show-cause hearings and discovery conferences, to contested review hearings or motion hearings, and eventually settlement negotiations or trial. Represent clients in arbitrations and mediations.

Bell & Ingram, P.S., Everett, WA

Associate Attorney

September 2005 – December 2007 Represented clients in juvenile law matters, including dependency and termination proceedings, juvenile offender, and court-appointed Guardian ad Litem cases at Snohomish County Juvenile Court. Appeared in Superior Court for various civil litigation hearings and trials, including family law, business law, collection, property, landlord-tenant cases, and domestic violence cases. Represented clients in criminal hearings at District Court and handled estate planning cases. Court hearings involved all stages of the case from preliminary/show-cause hearings and discovery conferences, to contested review hearings or motion hearings, and eventually settlement negotiations or trial. Represented clients in arbitrations and mediations.

Law Offices of Alayne Spaulding, Everett, WA

Associate Attorney

December 2002 – September 2005 Represented clients (parents and children) in juvenile law matters, including dependency and termination proceedings, juvenile offender, BECCA bill, CHINS, ARY, and court-appointed Guardian ad Litem cases at Snohomish County Juvenile Court. Appeared in Superior Court for child support contempt hearings and family law matters, including dissolution proceedings, parenting plan modifications, and child support contempt hearings. Represented clients in criminal hearings at District Court. Court hearings involved all stages of the case from preliminary hearings and discovery conferences, to contested review hearings or motion hearings, and eventually settlement negotiations or trial.

PROFESSIONAL MEMBERSHIPS AND SKILLS

WSBA Member, in good standing, November 2002 – present

- WSBA Pro Bono Publico Service Commendation, every year since 2006
- Solo & Small Practice Section, Member 2009 present
 - Chair, April 2018 September 2020
 - Chair-Elect, October 2016 April 2018
 - Executive Committee, 2012 present
 - Electronic Communications Committee, Chair 2014-2015, Member 2014 present
 - Solo & Small Firm Conference Steering Committee, 2018 present
- WSBA Board of Governors, District 2 Governor, October 2022 present
 WSBA Treasurer, October 2024 present
- WSBA Rural Practice Project, November 2020 March 2021
- WSBA Small Town and Rural Council, Chair, October 2022 present
 Education & Outreach Subcommittee, Chair October 2021 present
- Juvenile Law Section, Member
 Executive Committee, 2021 present
- WSBA Delegate to the ABA House of Delegates, September 2010 August 2016, September 2020 – September 2022
- Mentorship Workgroup, 2014

Washington Young Lawyers Division, member 2002 - 2013

- WYLD President, 2010 2011
- WYLD President-Elect, 2009 2010
- WYLD Snohomish District Trustee, 2005 2009
- WYLD Board of Trustees liaison to WSBA Solo Small Practice Section, 2008 2009
- Trial Advocacy Program, Chair: 2008, 2009; Co-Chair: 2010

Washington Women Lawyers, member 2007 - present

- State Board Treasurer, October 2017 present
- State Board Membership Co-VP, April 2017 September 2017
- Joint Minority Mentorship Program, Mentor 2020 present
- Snohomish County Chapter Board member, 2012 present
- Snohomish County Chapter Treasurer, October 2018 present
- Snohomish County Chapter Representative to State Board, October 2015 September 2016
- Joint Minority Mentorship Program, Mentor, 2021 present
- Washington Association for Justice, Eagle Member, 2015 present

Snohomish County Bar Association, 2002 - present

- Treasurer, January 2021 January 2024
- President, 2015
- Board Member, 2012 2024
- Snohomish Co Superior Court GAL Committee, SCBA Representative, January 2021 – present
- Mentorship Committee Co-Chair, 2012 2018

Snohomish County Legal Services

- Serving Our Senior Will Clinic Attorney Recruitment volunteer and participant, 2011 present
- Board Member January 2006 December 2012
- Family Law Clinic Volunteer and Direct Representation Attorney
- Snohomish County Young Lawyers Division, founding member, 2003-2013
 - Trustee 2003-2006, 2007-2009
 - President 2006-2007

American Bar Association, member 2002 - present

- ABA At-Large Delegate to the House of Delegates, September 2017 August 2020, September 2022 – present
- ABA State Membership Chair Washington, September 2019 present
- ABA Standing Committee on Membership, September 2023 present
- ABA Technology & Communications Committee, September 2024 present
- ABA Standing Committee on Technology & Information Systems, September 2020 2023
- ABA Cybersecurity Legal Task Force, September 2021 August 2024
- ABA Membership Advocate, 2017-2019
- GP|Solo Member 2005 present
 - Council Member, 2014 2020
 - Corporate Sponsorships Committee, Chair, 2017 2019; Vice-Chair, 2015 2017; Member 2015 2020
 - Director of Division 2: Member Benefits, September 2019 August 2020
 - Director of Division 1: Administration, September 2018 August 2019
 - Director of Division 4: Practice Setting, September 2017 August 2018
 - Director of Division 3: Practice Specialty, September 2016 August 2017
 - Women's Initiative Network, September 2016 present
 - Technology & Resource Committee, Chair, 2019 present; Member 2015 present
 - Programs Board, Co-Chair, 2020 2021, member 2021 present
 - Juvenile Law Committee Chair, September 2013 2016; Co-Chair, September 2012 August 2013, Member since 2010
 - Young Lawyers Committee Member, 2010 present
 - Young Lawyer Fellow Mentor
 - Membership Board Member, 2011 2015
- Judicial Division, Lawyers Conference, 2009 present
 - Executive Committee Member, September 2022 present
 - Vice-Chair, September 2024 present
- American Bar Foundation, Fellow 2015 present
- Youth at Risk Advisory Commission, September 2016 2018
- Children and the Law Committee, 2009 2016
- YLD Fellows, Member 2014 present
- YLD Member Service Team Coordinator, September 2012 August 2013; member 2009-2010
- YLD District 29 (WA/OR) Representative, 2010-2012
- 2008 National Outstanding Young Lawyer Nominee

Seattle University School of Law 1L Mentorship Program, Mentor 2017 – present Washington State CASA, member 2003 - present

COMMUNITY ACTIVITIES

Archbishop Murphy High School mock trial coach, 2011 – 2022, 2023 - 2024 Rotary Club of Everett, 2017 – present

- Program Committee Chair, July 2021 2024
- Vice President, July 2020 June 2021, July 2024 present
- Fellowship Committee Chair, August 2018 June 2020

Gustavus Adolphus Student Mentoring Program, Mentor, 2019 – present Gustavus Adolphus College Seattle Alumni Chapter President, 2015 – present

• Diversity, Equity & Inclusion Alumni Board Task Force, 2017-2018 Camp Fire of Snohomish County, Governing Board Member, 2021 – present Susan G. Komen 3-day, 60-mile Walk for the Cure, 2011 and 2012 Everett Symphony Board Member, 2007



BURI FUNSTON MUMFORD FURLONG

ATTORNEYS AT LAW

PHILIP BURI PHILIP@BURIFUNSTON.COM

April 7, 2025

Board of Governors Washington State Bar Association 1325 Fourth Ave., Suite 600 Seattle, WA 98101-2539

RE: Kari Petrasek for Bar President

To the Board of Governors:

I wholeheartedly recommend Kari Petrasek as our next Bar President. Having worked with Kari on local and State Bar matters, I can confirm what you already know – she is the most dedicated, capable person in the room. And she is a genuinely kind person.

I served on the Board of Governors between 2010 and 2013, witnessing the countless hours the Bar President works behind the scenes. Kari will without question give her all to the job. And with the unprecedented attacks on the rule of law, we will need a Bar President who stands up with courage and tact. Kari is a perfect fit.

Finally, a great Bar President must hold conflicting views (and conflicting Governors) together in meetings that can easily spin out of control. Kari will keep the Board on topic without dominating the conversation or suppressing it. This can be a tricky balance and I know that Kari's experience will serve her well.

Please add my name to the list of Kari's fans. She will be a great Bar President.

Sincerely,

BURI FUNSTON MUMFORD, PLLC

Philip Buri

DICKINSON LAW FIRM, PLLC

LISA J. DICKINSON* * Admitted in Washington and Idaho

lisa@dickinsonlawfirm.com

1020 N Washington St. Ste. 3 Spokane WA 99201

Phone: (509) 326-0636

March 31, 2025

WSBA Board of Governors

Sent via electronic mail only to expedite delivery to: barleaders@wsba.org

RE: Kari Petrasek for President-Elect

Dear Board of Governors:

I write to recommend the nomination of Kari Petrasek for WSBA President-Elect. I have known her and worked with her for many years, since she was active in the YLD. As WSBA President (Elect and also President), the needs of the entire state must be met. I hail from Eastern Washington and am proud to recommend her for this position, as I believe she will always keep the interests of Eastern Washington attorneys in mind, along with rural attorneys as well. I'm sure you are familiar with her work as Chair of the newer Small Town and Rural Practice Council.

Ms. Petrasek, no matter how busy, always gets the job done, shows up, and gets it done to the best of her ability. Despite her busy schedule and bar activities, in my experience, there is no question that she will get everything done above and beyond what is expected of her. I have worked with her extensively on boards and committees, and her work ethic is second to none. Her unwavering dedication to the legal profession shows through in all that she does.

She has held many leadership positions throughout the years, and to my knowledge, she has done good work and made relationships not only statewide but nationally as well. It is important for WSBA to have a voice nationally in the profession, and I have seen her have that seat at the table in her ABA work, serving with her on the House of Delegates, the Standing Committee on Technology and Information Systems, and on many other committees including GP Solo Division work as well.

I have full faith that she will be a great leader for WSBA and I recommend her candidacy without hesitation.

Very truly yours,

Thon. Didum

LISA J. DICKINSON



WHATCOM LAW GROUP

A PROFESSIONAL SERVICES CORPORATION

Alejandra Cabrales, MPA, JD Roger L. Ellingson, JD-*emeritus* Rajeev D. Majumdar, MAIS, MPA, JD Casie C. Rodenberger, MSW, JD Matt Rommelmann, JD



April 6, 2025

Board of Governors Washington State Bar Association 1325 Fourth Ave., Suite 600 Seattle, WA 98101-2539

RE: Kari Petrasek's Candidacy for WSBA President-Elect

Dear Governors,

I am writing to you in support of Kari Petrasek's candidacy for the office of President-Elect. As a former Governor and as a former WSBA President, I am heavily invested and concerned with our organization having the experienced and calm leadership, that can assist the board in responding to the unexpected and ensuring the agenda of the board is implemented and represented well to the Supreme Court, the Legislature, and the public.

Kari Petrasek is the candidate with the most experience representing our profession, the diligence serving our community, and the demeanor that brings honor to the reputation of lawyers everywhere. In her campaign for governor, she was the only candidate to articulate that "...for lawyers to be able to serve their communities effectively, they need support, training, and resources." Values that the WSBA needs to not just foster and implement but also be seen as championing in more than words.

If you have seen Kari's resume, you will note on it that there is more service dedicated to improving the legal profession and the lives of her colleagues than any lawyer I know. And that service is continuous over her 23-year career, whether it be leadership in her local bar, leadership with the ABA, leadership with Washington Women Lawyers, leadership with WSBA Sections, or leadership of the Young Lawyers Division (*etc.*)... Kari has continuously put the time and energy in to better our profession.

But most importantly, she is a person who understands how practice is different out on the periphery and away from the urban centers of King County. She understands that she needs to represent all the members of our great association, to advocate to you to allocate the resources to



Whatcom Law Group, P.S. To: WSBA BoG, *re*: Kari Petrasek Page **2** of **2**

help make our practices easier, and to assist you in holding the WSBA accountable to serving all of its members with the greatest value it can muster.

The WSBA is our organization- and we deserve a chief spokesperson that can speak with lawyers across the state; that is Kari Petrasek.

Thank you for your consideration of these words and your service to the profession. Please feel free to call with any questions or concerns.

Sincerely,

Rajeev D, Majumdar WSBA# 39753

RDM



April 6, 2025

VIA EMAIL barleaders@wsba.org

Washington State Bar Association 1325 Fourth Ave, Ste 600 Seattle, WA 98101-2539

Subject: Letter of Recommendation in Support of Kari Petrasek for President-Elect of the Washington State Bar Association¹

Dear WSBA Bar Leaders:

I write to endorse Kari Petrasek's candidacy for President-Elect of the Washington State Bar Association. I have been a member of the WSBA for almost thirty years and have gladly volunteered my time to the organization for most of that time. From working and serving with Kari, I know that she is exceptionally qualified and well suited for this leadership role. Having served in this same position for the WSBA in 2020 and 2021, I know that Kari is up for the task.

The President of the WSBA must be thoroughly familiar with the issues facing the organization and the services it provides to its licensees. She must be a good listener, be able to communicate well with attorneys and the public throughout the state and recognize the bar association's powers and limitations. Kari comes to the position well prepared, having served these past few years as the WSBA Governor for District 2 as well as her work as treasurer of the organization and chairing the WSBA's Small Town and Rural Council.

I have had the pleasure of working alongside Kari on the American Bar Association's House of Delegates. Kari has built a strong reputation as an effective leader on the national level and her service to the ABA is unparalleled. Her resume speaks for itself and demonstrates years of work in support of public service making both the state and national bar associations better for it.

The job of President of the WSBA is not easy and the time commitment is enormous. Kari will not shy away from either challenge. She will likely set aside much of the work of her private practice and will throw herself into service for the WSBA with the same energy and dedication

¹ This endorsement by Kyle Sciuchetti does not represent the positions of any other entities, including Miller Nash or the Oregon State Bar.

April 6, 2025 Page 2



she applies to all of her volunteer work. She will listen. She will advocate. She will lead the organization toward a better tomorrow for all of us.

Kari has proven herself to be a prudent and insightful leader and steward of the WSBA and I wholeheartedly endorse her as President-Elect of the organization for which I have devoted so many hours of my own time. With Kari as President-Elect, and eventually President of the organization, I know that the WSBA will be in good hands and will continue to thrive and provide the excellent services that the Bar is known for. She will be a great partner to the executive director and staff of the WSBA who does the important work of the Bar. Kari's professional experience, as well as her reputation in the community, leadership, and ability to work with diverse people and groups will serve her well as the spokesperson for the association.

Every day, our bar association and bar associations from across the country face new challenges and obstacles. Kari will work to uphold the rule of law, strive to improve access to justice and protect the autonomy of the judicial branch of government. Kari understands the importance of due process and the work attorneys and judges do as protectors of the constitution and advocates for those who cannot advocate for themselves. Strong leadership has never been more important than it is today. I trust that Kari will rise to the occasion and improve upon the great work that the WSBA has consistently and steadfastly done for almost 100 years.

The membership of the Bar, the public and the WSBA Board of Governors will be well-served and well represented with Kari in the position of WSBA President-Elect. She will work tirelessly for the organization and will make it better. I look forward to seeing what she achieves and her many contributions to the WSBA in the years to come.

Sincerely,

Kyle D. Sciuchetti, P.C.

President-elect Application Form

INSTRUCTIONS

- 1) Complete this application form. If you are nominating someone else, ask them to sign it below and submit it along with the required attachments.
- 2) Attach the following:
 - This complete application form (required) •
 - Letter of Interest
 - Resume
 - Letters of Support
- 3) Scan and email the signed form and attachments to barleaders@wsba.org. Applications must be received by 5 p.m. PST on Tuesday, April 8, 2025. Late materials will not be accepted.
- 4) Letters of support, if any, can be sent directly to barleaders@wsba.org by the author.
- 5) Applications will be included in the May Board of Governors meeting materials and posted on the WSBA website.

Candidate for President-elect position of the Washington State Bar Association

I, the undersigned active member of the Washington State Bar Association, am running for the Presidentelect position.

Kari Petrasek

Name of candidate (please print)

Signature of Candidate

Signature of Nominator (if relevant)

Note: By signing this form, the candidate understands and agrees that as part of the election process for this position, the WSBA routinely checks the grievance and discipline files for any records related to candidates. Thus, the candidate waives confidentiality of these materials to WSBA staff and the Board of Governors.

This form must be filed in the Office of the Executive Director of the WSBA no later than 5 p.m. PST on April 8, 2025. Filing may be accomplished by emailing the form and attachment(s) to barleaders@wsba.org.

WSBA Bar #

33058 WSBA Bar #

Pool of Interview Questions for WSBA President-elect Candidates

April 2025

Background

- 1. Why do you want to serve in this role?
- 2. How will you fit Board service into your personal, work, and other commitments?
- 3. What motivates you as an individual?
- 4. Please share any prior board leadership experience.

Interest and Commitment

- 5. What experience(s) do you have related to WSBA's mission?
- 6. What interests you most about the WSBA?
- 7. What makes our mission meaningful to you?
- 8. What three adjectives or short phrases do you think best characterize WSBA?
- 9. What is your understanding of the role of the WSBA Board of Governors and the role of WSBA President?

Skills and Expertise

- 10. What qualities make a great WSBA President?
- 11. What would you suggest your unique contribution to the Board to be?
- 12. What is the most difficult problem that a board you have been on has had to deal with and what did you learn from that experience?

Current Topics and Member Engagement

- 13. How could you serve as a link between the organization and the legal community?
- 14. What initiatives (current or yet to be contemplated) do you think the Board should focus on to help serve the public and the members?
- 15. As the WSBA considers its structure in light of first amendment challenges, what do you think are the most important considerations?
- 16. On June 4, 2020, our Washington Supreme Court issued a letter in response to the growing public outcry for social justice and call upon the legal profession to take individual and collective action towards addressing issues of racism in our legal system. In what ways can the WSBA act in response to this call to action?
- 17. As a board member, what would you do to promote diversity, equity, and inclusion on the Board itself and in the profession as a whole?

Memo

То:	Board of Governors
From:	Raina Wagner and Governor Nam Nguyen, DEI Council Co-Chairs Miryam Gordon and Sharon Sakamoto, DEI Council Members and Co-Chairs of Equity and Justice Plan Workgroup
CC:	Terra Nevitt, Executive Director
Date:	April 10, 2025
Re:	Proposed WSBA Equity and Justice Plan

SECOND READING AND REQUEST FOR APPROVAL: The Diversity, Equity and Inclusion Council is requesting a second read and approval of the proposed 2025 WSBA Equity and Justice Plan.

Background

Over the last two years, the Diversity, Equity and Inclusion Council has been working towards developing a new plan that would replace the 2013 Diversity and Inclusion Plan. As outlined in previously submitted memos (see attached Memos dated December 20, 2024, and February 18, 2025) and previous presentations to the Board of Governors, the new plan is data-driven, informed by a cross-section of members, and stems from WSBA's purpose to regulate the profession and improve the quality of legal services.

Final Proposed Plan

The Diversity, Equity and Inclusion Council has been seeking feedback on its initial draft from members of the Bar, members of the public (communities throughout Washington State), the larger legal community and the Board of Governors since October 2024. We appreciate the questions and feedback that the Board of Governors shared at your last meeting in March. We have made some edits which you can review in the attached redlined version of the new plan.

We believe that this final version of the plan makes it clearer that the goals toward achieving equity and justice are consistent with the purpose of the Bar, are broad enough to encompass a variety of approaches and specific enough to inform implementation strategies. The plan invites all legal professionals to work towards equity and justice for all Washingtonians.

Conclusion

We respectfully ask that you review the newly revised 2025 Equity and Justice Plan for a second reading and approve it.

Attachments

Proposed WSBA Equity and Justice Plan for Second Reading Clean and Redlined Versions BOG Cover Memo dated December 20, 2024 BOG Cover Memo dated February 18, 2025

2025 WSBA EQUITY AND JUSTICE ACTION PLAN

The Washington State Bar Association recognizes the importance of having a legal profession that reflects the rich tapestry of the communities it serves. All Washingtonians are better off when our State's legal system and legal community are fair and welcoming to everyone. The Washington State Supreme Court, under General Rule 12.2(a)(6)¹ has delegated the responsibility "to promote diversity and equality in the courts and the legal profession" to the Washington State Bar Association.

The Action Plan is informed by data collected in the 2024 Membership Demographic Study which tells us that our profession still has work to do to ensure that our legal community better reflects the public we serve. This Study shows continued marginalization of our underrepresented legal professionals who report that they are less likely to experience positive and satisfying workplace environments. Further, from addressing legal professional shortages in rural areas to increasing the number of legal professionals who understand clients varied lived experiences, legal services are more accessible when the legal profession reflects the communities we serve. The Action Plan's goals are lawful and necessary to affirm WSBA's unwavering commitment to its mission—to serve the public and members, ensure the integrity of the profession, and champion justice.

With its open letter, published in June 2020, our Washington State Supreme Court reaffirmed the responsibility of legal professionals to promote diversity and equity in the courts and legal profession as set forth in GR 12.2(a)(6). In that letter, the Court acknowledged that "our institutions remain affected by the vestiges of slavery," and declared that "the legal community must recognize that we all bear responsibility for this on-going injustice." Citing it as our "moral imperative," the Court unanimously called "on every member of our legal community to reflect....and ask ourselves how we may work together to eradicate racism." Our Action Plan seeks to answer the Court's call, to further WSBA's stated mission, and extend our commitment with an expanded awareness of all barriers that inhibit access to legal services and inclusion in the legal profession.

Our vision of success for the Action Plan is to foster and support a legal system that 1) is committed to ensuring that everyone in our State needing legal services can realistically access those services, and 2) assures everyone in our State interested in entering the legal field has a realistic opportunity to achieve success in our profession.

¹ The Washington Supreme Court adopted amendments to what was then GR 12 in 1997, adding "to promote diversity and equality in the courts and the legal profession."

EQUITY AND JUSTICE ACTION PLAN'S THREE GOALS

Strengthen the legal profession by building community and fostering belonging. Advance a fair, inclusive, effective, and accessible legal system for all people in our State.

Deepen and broaden WSBA leaderships'* ongoing commitments to addressing inclusion, belonging and equity issues.

<u>GOAL #1</u>: Strengthen the legal profession by building community and fostering belonging.

VISION FOR SUCCESS: The legal profession will more accurately reflect all the various communities we serve, and every legal professional will feel that they belong in the legal community and are able to thrive inclusive of their social identity and background.

STRATEGIES (in no particular order):

- Partner with affinity bar associations; educational institutions from elementary schools, middle school, high schools, community colleges, universities and law schools; underrepresented and/or marginalized communities; and community-based organizations to identify and implement policies and programs that promote inclusion and belonging in the profession.
- 2. Leverage and improve data collection, analysis, and reporting processes, in order to identify and address actual or potential disparities and inequities in the regulation of the profession, and to better track member attrition from the profession.

- 3. Equip legal leaders*, including employers and the judiciary, with better tools to meaningfully remove barriers to inclusion and belonging for all legal professionals.
- 4. Design and implement a process to identify and address gaps in training regarding inclusion and belonging, with a view toward creating accountability.
- 5. Support opportunities that promote wellness, mentorship, leadership, accessibility and community for all members regardless of their social identity and background.
- 6. Explore and foster innovative pathways to the profession, including alternatives to bar licensure, and potential regulatory pilot programs designed to open opportunities and increase access to the legal profession.

<u>GOAL #2:</u> Advance a fair, inclusive, effective, and accessible legal system for all people in our State.

VISION FOR SUCCESS: All Washingtonians will have realistic access to high quality and affordable legal services, from legal practitioners who apply an informed perspective of individual circumstances, including an intention to identify and ameliorate the effects of bias.

STRATEGIES (in no particular order):

- Support innovative legal services delivery models that provide more affordable legal services to the most underserved and marginalized communities in our State including people living in rural areas, undocumented communities, people who have limited English proficiency, tribal communities, people with disabilities, and people experiencing poverty, and systemic oppression.
- 2. Support and implement changes that make WSBA and the legal system more accessible, through continued exploration of the benefits of developing court rules that do not vary from county to county, where technology is uniform and accessible, for both the public and legal professionals.
- 3. Support policymaking and sustainable, long-term, funding efforts that improve the consistency of quality legal services available to the public.

GOAL #3: Deepen and broaden WSBA leaderships'* ongoing commitments to addressing inclusion, belonging and equity issues.

VISION FOR SUCCESS: WSBA leaders* will represent a diversity of social identities, backgrounds, lived experiences and perspectives that demonstrate a culture of inclusion and belonging, and will make decisions that result in fairer outcomes, and increase public trust and confidence in the legal profession.

STRATEGIES (in no particular order):

- 1. Promote participation from all social identities, backgrounds, lived experiences and perspectives within the membership of WSBA entities.
- 2. Support initiatives that create a welcoming environment so that marginalized communities can express their concerns and ideas and be confident that WSBA leadership* carefully considers their perspectives.
- Encourage the Board of Governors to regularly collaborate and communicate with affinity bar associations, and facilitate a culture of belonging and inclusion among all WSBA leaders*.
- 4. Create a process to respond, in a timely and thoughtful way, to inclusion and belonging issues that arise within the legal community and assure that those issues are acknowledged.
- 5. Collaborate to create policies that enhance equity in the legal system and legal profession.
- 6. Continue equity education including communication training for WSBA leadership.
- 7. Identify measures for accountability, work with the Board of Governors to track progress toward meeting the plan's goals, identify challenges and solutions, and draft easy to understand reports.

Achieving the goals set forth in the Action Plan will require a dynamic implementation strategy that will continuously track and measure success and adapt to ensure these goals are reached. This Action Plan will be paired with a more detailed Implementation Plan which will extend our development with a more granular set of practical applications. Acknowledging that there are, often, a variety of solutions, the WSBA will continue to seek input from members of WSBA and the public from across the State on ways we can implement the Action Plan and collectively achieve equity and justice.

With the guidance of our Supreme Court, WSBA invites each of us, as legal professionals, to expand our efforts to undertake this important work, providing equity and justice for all Washingtonians. WSBA believes that every community of Washington State benefits from these efforts when each and every member of the legal profession takes part.

*References to "leaders," or "leaderships," are meant to include – but are not limited to – individual leaders as well as groups of leaders of committees, councils, commissions, sections, boards, local bar associations.

2025-2030 WSBA EQUITY AND JUSTICE ACTION PLAN

The Washington State Bar Association recognizes the importance of having a legal profession that reflects the rich tapestry of the communities it serves. All Washingtonians are better off when our State's legal system and legal community are fair and welcoming to everyone. The Washington State Supreme Court, under General Rule $12.2(a)(6)^{\perp}$ has delegated the responsibility "to promote diversity and equality in the courts and the legal profession" to the Washington State Bar Association.

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reflects the communities we serve. The Action Plan's goals affirm WSBA's unwavering commitment to its mission—to serve the public and members, ensure the integrity of the profession, and champion justice. Our vision of success for the Action Plan is to foster and support a legal system that 1) is committed to ensuring that everyone in our State needing legal services can realistically access those services, and 2) assures everyone in our State interested in entering the legal field has a realistic opportunity to achieve success in our profession.



EQUITY AND JUSTICE ACTION PLAN'S THREE GOALS

<u>GOAL #1</u>: Strengthen the legal profession by building community and fostering belonging.

2

VISION FOR SUCCESS: The legal profession will more accurately reflect all the various communities we serve, and every legal professional will feel that they belong in the legal community and are able to thrive inclusive of their social identity and background.

STRATEGIES (in no particular order):

- Partner with affinity bar associations; educational institutions from elementary schools, middle school, high schools, community colleges, universities and law schools; underrepresented and/or marginalized communities; and community-based organizations to identify and implement policies and programs that promote inclusion and belonging in the profession.
- 2. Leverage and improve data collection, analysis, and reporting processes, in order to identify and address actual or potential disparities and inequities in the regulation of the profession, and to better track member attrition from the profession.
- Equip legal leaders*, including employers and the judiciary, with better tools to meaningfully remove barriers to inclusion and belonging for all legal professionals.
- Design and implement a process to identify and address gaps in training regarding inclusion and belonging, with a view toward creating incentives and other mechanisms with a view toward creating accountability.
- 5. Support opportunities that promote wellness, mentorship, leadership, accessibility and community for all members regardless of their social identity and background.
- Explore and foster innovative pathways to the profession, including the Law Clerk Program, the Limited License Legal Technicians, Limited Practice Officers, alternatives to bar licensure, and other potential regulatory pilot programs designed to open opportunities and increase access to entry for underserved communities, such as people in rural areas. the legal profession.

<u>GOAL #2:</u> Advance a fair, inclusive, effective, and accessible legal system for all people in our State.

VISION FOR SUCCESS: All Washingtonians will have realistic access to high quality and affordable legal services, from legal practitioners who apply an informed perspective of individual circumstances, including an intention to identify and ameliorate the effects of bias.

STRATEGIES (in no particular order):

 Support innovative legal services delivery models that provide more affordable legal services to the most underserved and marginalized communities in our State including people living in rural areas, undocumented communities, people who have limited English proficiency, tribal communities, people with disabilities, and people experiencing poverty, and systemic oppression.

- Support and implement changes that make WSBA and the legal system more accessible, through continued exploration of the benefits of developing court rules that do not vary from county to county, where technology is uniform and accessible, for both the public and legal professionals.
- 3. Support policymaking and sustainable, long-term, funding efforts that improve the consistency of quality legal services available to the public.

GOAL #3: Deepen and broaden WSBA leaderships'* ongoing commitments to addressing inclusion, belonging and equity issues.

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- 4. Create a process to respond, in a timely and thoughtful way, to inclusion and belonging issues that arise within the legal community and assure that those issues are acknowledged.
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- 6. Continue equity education including communication training for WSBA leadership.
- Identify measures for accountability, work with the Board of Governors to track progress toward meeting the plan's goals, identify challenges and solutions, and draft easy to understand reports.

Achieving the goals set forth in the Action Plan will require a dynamic implementation strategy that will continuously track and measure success and adapt to ensure these goals are reached. This Action Plan will be paired with a more detailed Implementation Plan which will extend our development with a more granular set of practical applications. Acknowledging that there are, often, a variety of solutions, the WSBA will continue to seek input from members of WSBA and the public from across the State on ways we can implement the Action Plan and collectively achieve equity and justice.

With the guidance of our Supreme Court, WSBA invites each of us, <u>as legal professionals</u>, to expand our efforts to undertake this important work, providing equity and justice for all <u>Washingtonians</u>. WSBA believes that <u>the wholeevery</u> community <u>of Washington State</u> benefits from these efforts when <u>each and</u> every member of the legal profession takes part.

*References to "leaders," or "leaderships," are meant to include – but are not limited to – individual leaders as well as groups of leaders of committees, councils, commissions, sections, boards, local bar associations.

Memo

То:	Board of Governors
From:	Raina Wagner and Governor Nam Nguyen, DEI Council Co-Chairs Miryam Gordon and Sharon Sakamoto, DEI Council Members and Co-Chairs of Equity and Justice Plan Workgroup
CC:	Terra Nevitt, Executive Director
Date:	February 18, 2025
Re:	Proposed WSBA Equity and Justice Plan

FIRST READING: The DEI Council is requesting a first read of the proposed WSBA Equity and Justice Plan followed by a second reading and approval at the Board of Governor's May meeting.

Background

With the goal of improving the quality of legal services and the regulation of the legal profession, the WSBA has been engaged in diversity, equity and inclusion work since the 1990s. In 2012, the Bar commissioned a comprehensive membership demographic study that informed the WSBA's Diversity and Inclusion Plan, which was approved by the Board of Governors in 2013. That plan set out strategies to educate members of the Bar about diversity and inclusion issues; improve relationships generally with underrepresented members and specifically with affinity bar associations; and improve data collection and commit to commission a comprehensive membership demographic study every 10 years.

In 2023, the Bar began a process to commission a new membership study and retained KGR+C, an independent research consulting firm who did a similar study for the Oregon State Bar. The DEI Council worked closely with the consultant to design a study that would not only help paint a picture of who we are as a legal profession, but also dive deeper, asking about Bar members' experience in the workplace.

Meanwhile, as the study was underway, the DEI Council began the process to map out a new plan that would refresh the 2013 Diversity and Inclusion Plan. The Council determined that it should incorporate information from the demographic study and also seek broad input across the WSBA and larger legal community about WSBA's work to advance diversity, equity and inclusion. To support the creation of the plan, the Council enlisted the Institute for the Inclusion in the Legal Profession (IILP)—a national

organization that has worked with many bar associations across the country—to gather and assess input about the WSBA's DEI work and assist with drafting a new plan.

From January to May 2024, IILP conducted 21 focus groups and three individual interviews. This sampling represented a broad cross-section of people, including local and affinity bar association leaders, lawyers from private large and small firms and solo practitioners, corporate and in-house counsel, judges, government and public sector members, law school staff, faculty and students, general members, and members of the public. In June 2024, IILP shared their findings with the DEI Council and made recommendations for what to include in the new plan.

In August 2024, shortly after the DEI Council received IILP's findings, KGR+C completed the membership demographic study. The findings were shared widely via a free CLE in August, at the BOG meeting in September 2024, and in the November 2024 issue of the *Bar News*. The DEI Council closely reviewed the findings from the membership demographic study, the IILP report, as well as recommendations the affinity bar associations had submitted to the Board of Governors in 2022, to inform the draft of a new Equity and Justice Plan ("Plan"). The DEI Council's initial draft Plan laid out three goals: 1) strengthen the legal profession by fostering belonging and building community; 2) advance a fair, inclusive, effective and accessible legal system for all; and 3) deepen and broaden the WSBA leaders' commitment to equitable decision-making.

The DEI Council sought broad input from October to November and carefully reviewed it in December and January. Throughout this process, the DEI Council reported our progress to the Board of Governors to keep them informed of the developing Plan, along with the initial draft.

To incorporate feedback and improve the plan, the DEI Council made changes to the initial draft and now presents the proposed Equity and Justice Plan to the Board of Governors for a First Reading. We ask the Board of Governors to share your input and suggestions so the DEI Council can improve the plan and bring it back for a Second Reading and approval at your meeting in May.

Why an Equity and Justice Plan?

We are proposing a new Equity and Justice Plan to fulfill the WSBA's purpose of regulating the legal profession and improving the quality of legal services. Based on that premise, the Plan sets out three goals and underlying strategies that will facilitate the WSBA's prescribed activities, purposes and objectives outlined in General Rules 12.1 and 12.2, which include but are not limited to:

- Promoting an effective legal system, accessible to all;
- Meaningful access to justice and information about the law, legal issues, and the civil and criminal justice systems;
- Advancement of the administration of justice and the rule of law;
- Delivery of affordable and accessible legal services;
- Promoting an understanding of and respect for our legal system and the law;

- Fostering and maintaining high standards of competence, professionalism and ethics among its members;
- Fostering collegiality among its members and goodwill between the bar and the public;
- Promoting diversity and equality in the courts, the legal profession, and the bar; and
- Diversity and inclusion among legal services providers and freedom from discrimination from those receiving legal services and in the justice system.

We learned from the 2024 Membership Demographic Study and significant input from members through surveys and focus groups that our legal profession's diversity has not increased and does not reflect the broad variety of communities in our state. We also learned that underrepresented members continue to disproportionately experience a lack of inclusion and belonging. Further, we came to understand that access to justice, especially for marginalized members of the public, continues to remain out of reach. The proposed Plan acknowledges the importance of a legal profession that reflects the communities we serve, and that all Washingtonians are better off when our State's legal system and legal profession are fair and welcoming to everyone.

If approved, the Plan can be used as a mechanism to unify the Bar's current equity and justice work already under way, bring the legal profession together to identify ways to create and enhance systemic improvements and track progress towards meeting the three goals. We propose a five-year Equity and Justice Plan so we can create a timeline, track our progress and evaluate and implement needed changes on an ongoing basis.

Applying an Equity Lens and Seeking Community Input

The DEI Council applied an equity lens from the start of our planning process by first identifying the groups who may be impacted by the Plan. We identified that the entire membership – including members who are underrepresented – may be impacted in the effort to improve the profession. We also identified that volunteers and WSBA staff's current work and capacity may be impacted. Finally, we identified that the public and members of the larger community may be impacted in the effort to improve the profession and the legal system.

We engaged with these groups from the beginning by asking the membership demographic study consultant (KGR+C) to include these groups in the design of the study, the survey, and the study's focus groups, and by asking the DEI assessment consultant (IILP) to include all of the groups in the focus groups and interviews. The insights, perspectives and experiences, which were anonymized and aggregated, were considered as we drafted the Plan.

Once the initial draft of the Plan was complete, we designed an outreach plan to solicit feedback and input. We created a stakeholder map where we identified four groups: 1) those who would be most directly impacted, highly invested and with the lowest power; 2) those who would be directly impacted, highly invested and with the highest power; 3) those who would not be very impacted, not very invested, but have high power; and 4) those who are not very impacted and have low investment and low power.

We prioritized those in the first group and regularly engaged with those in the second group. We also worked to keep the third and fourth groups informed.

In early October 2024, the DEI Council shared the draft Plan broadly, seeking input from a variety of people and groups including every WSBA entity; all WSBA members; leaders from affinity bar associations, local bar associations, specialty bar associations, courts, law schools, government agencies and public interest legal organizations; and WSBA staff. DEI Council members and some Board of Governors engaged in personal outreach to organizations they already liaise with. WSBA staff engaged in outreach including personalized communications that followed the broad outreach efforts and presented at a variety of venues such as section executive committee meetings and affinity bar membership meetings. WSBA offered several ways to receive feedback, which included an online survey, email, and virtual drop-in Zoom meetings. In addition, the Board of Governors hosted a dinner with affinity bar leaders, facilitating small group discussions that enabled the DEI Council members and staff to hear and record their input and ideas.

We heard from over 180 people through the online survey, emails, and drop-in virtual sessions and received letters of support from eight organizations and entities. In the online survey, we asked for input on each goal and the strategies outlined for each goal and received over 80 completed surveys. A summary of the feedback themes can be found on the attached BOG cover memo from December 2024.

By and large, the feedback reflected agreement with the Plan's three goals including the focus on equity, accessibility, diversity and belonging. Suggestions for improvement included replacing buzz words with clearer language and outlining more specifics that describe clearer measurable actions.

The proposed draft Equity and Justice Plan we are presenting reflects the edits we made, which incorporates the feedback to use clearer language. As far as identifying how the progress will be monitored, the DEI Council plans to develop an implementation plan following approval of the Equity and Justice Plan.

Fiscal Considerations

The Plan sets out high level goals and strategies. Specific activities and actions like programs and events will be determined when the DEI Council engages in outreach and works towards an implementation plan. To that end, it may be difficult to draft a fiscal analysis at this time. While it may not be possible to forecast a specific dollar figure associated with the Plan, the Board of Governors will have an opportunity to review and determine approval of future annual budgets.

Conclusion

We ask that you review the draft Plan and share your input for what we can do to prepare and present the plan for approval in May.

WSBA RISK ANALYSIS: This section is to be completed by the Office of General Counsel, with input from the proposing entity or individual.

Included in confidential BOG Box materials.

WSBA FISCAL ANALYSIS: This section is to be completed by the Finance Department, with input from the proposing entity or individual.

As stated above, the fiscal impact of the proposed plan is difficult to assess because the specific activities to implement the plan goals have not been defined. At a minimum, the fiscal impact to WSBA includes staff time used to support the implementation of the plan which is included in the overall duties of existing WSBA staff and would not require additional staff or allocation of resources from other internal sources. Implementation activities such as hosting events, developing programs, and conducting outreach could incur expenses for room rentals, catering, travel reimbursements, consultants, marketing materials, etc. WSBA's FY 2025 budget includes a variety of direct expenses of similar type and varying size, which may help to provide some context for potential cost range. For example, the FY25 WSBA budget includes: \$35,000 to host a two-day Bar Leaders Summit, which will be an in-person only event held at the WSBA office and includes expenses to bring bar leaders in from around the state; a total of \$65,000 for Small Town and Rural Outreach and Activities that include funding for internship programming (\$45,000), a summit (\$12,000), two day of service events rural clinics (\$8,000); and \$500 for Law School Outreach to support a law student panel event and other engagement activities. The cost for implementation activities should be identified annually as part of the WSBA budget approved by the Board of Governors.

WSBA EQUITY ANALYSIS: This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.

The purpose of the equity assessments is to understand how entities incorporated an equity lens into the action items presented to the Board of Governors. An equity lens is 1) identifying and centering people and communities most impacted by decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all. The DEI Council outlines above how they applied an equity lens to the drafting of the Plan and their process to solicit input and feedback along the way. The DEI Council articulates its plans to set out ways to track progress and evaluate the Plan's impact. The Plan itself is designed to advance equity.

Attachments

Proposed WSBA Equity and Justice Plan for First Reading BOG Cover Memo dated December 20, 2024, which provides a summary of feedback

WASHINGTON STATE BAR ASSOCIATION

Memo

То:	Board of Governors
From:	Raina Wagner and Governor Nam Nguyen, DEI Council Co-Chairs Miryam Gordon and Sharon Sakamoto, DEI Council Members and Co-Chairs of Equity and Justice Plan Workgroup
Date:	December 20, 2024
Re:	Update on Development of Equity and Justice Plan

UPDATE: The DEI Council will provide an update on the development of the new Equity and Justice Plan.

Background

The WSBA has been engaged in working to make the profession more diverse and inclusive since the 1990s. In 2012, the Bar commissioned a comprehensive membership demographic study that informed the WSBA's Diversity and Inclusion Plan, which was approved by the Board of Governors in 2013. That plan set out strategies to educate members of the Bar about diversity and inclusion issues; improve relationships generally with underrepresented members and specifically with affinity bar associations; and improve data collection and commit to commission a comprehensive membership demographic study every 10 years.

In 2023, the Bar began a process to commission a new membership study and retained KGR+C, an independent research consulting firm who did a similar study for the Oregon State Bar. The DEI Council worked closely with the consultant to design a study that would not only help reveal a picture of who we are as a legal profession, but also dive deeper, asking about Bar members' experience in the workplace.

Meanwhile, as the study was underway, the DEI Council began the process to map out a new plan that would replace the 2013 Diversity and Inclusion Plan. The Council determined that it should incorporate information from the demographic study, and also seek broad input across the WSBA-verse about WSBA's work to advance diversity, equity and inclusion. To support the creation of the plan, the Council enlisted the Institute for the Inclusion in the Legal Profession (IILP)—a national organization that has worked with many bar associations across the country—to gather and assess input about the WSBA's DEI work and assist with drafting a new plan.

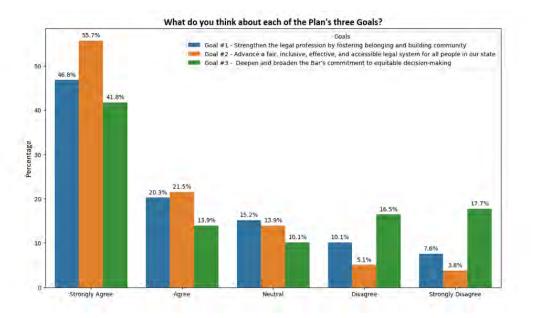
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In early October 2024, the DEI Council shared the draft Plan broadly, seeking input from a variety of people and groups including every WSBA entity: all WSBA members; leaders from affinity bar associations, local bar associations, specialty bar associations, courts, law schools, government agencies and public interest legal organizations; and WSBA staff. DEI Council members and the Board of Governors asked to assist with personal outreach to organizations they already liaise with. WSBA staff engaged in outreach as well, including personalized communications that followed the broad outreach efforts, and presenting at a variety of venues such as section executive committee meetings and affinity bar membership meetings. WSBA offered several ways to receive feedback, which included an online survey, email, and virtual drop-in Zoom meetings. In addition, the Board of Governors hosted a dinner with affinity bar leaders, offering small group discussions that enabled the DEI Council members and staff to hear their input and ideas.

Update on Feedback

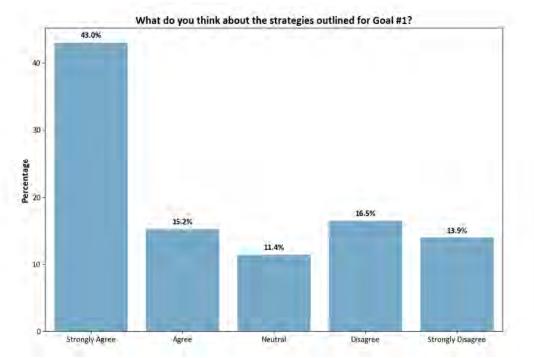
We heard from over 180 people through the online survey, emails, and drop-in virtual sessions and received letters of support from eight organizations and entities. In the online survey, we asked for input on each goal and the strategies outlined for each goal and received over 80 completed surveys. The following summarizes the general feedback on each of the three goals.



The strategies for Goal #1 ("Strengthen the legal profession by fostering belonging and building community") include:

- Partner with affinity bar associations, underrepresented communities and organizations working to make the legal profession more reflective of the public we serve and accessible to all communities, particularly those who are underserved.
- Leverage and improve data collection, analysis and reporting to learn from the data, identify inequities, ease entry and acceptance into the profession and reduce and eliminate disparities in the delivery of legal services.
- Equip legal leaders including employers and the judiciary to meaningfully remove barriers to inclusion and belonging for legal professionals regardless of their social identity and background.
- Support opportunities that promote wellness, mentorship, leadership, accessibility and community for all members regardless of their social identity and background.
- Explore and support innovative pathways to the profession.

The following summarizes input on Goal #1's strategies:

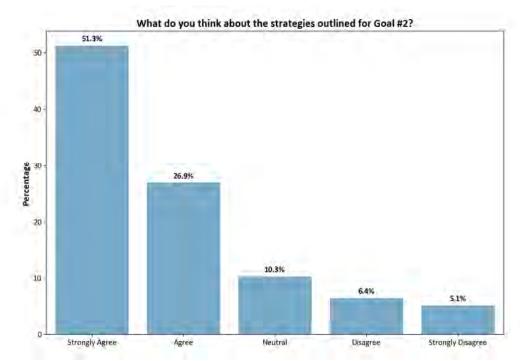


The strategies for Goal #2 ("Advance a fair, inclusive, effective, and accessible legal system for all people in our state") include:

- Support innovative legal services delivery models that provide more affordable legal services to the most underserved and marginalized communities in our state.
- Implement changes that make WSBA more accessible for people with disabilities and people with limited English proficiency.

- Equip Bar members and other legal practitioners with knowledge and tools to improve the quality of legal services for all including underserved and marginalized communities.
- Support policymaking efforts that address a lack of quality legal services.

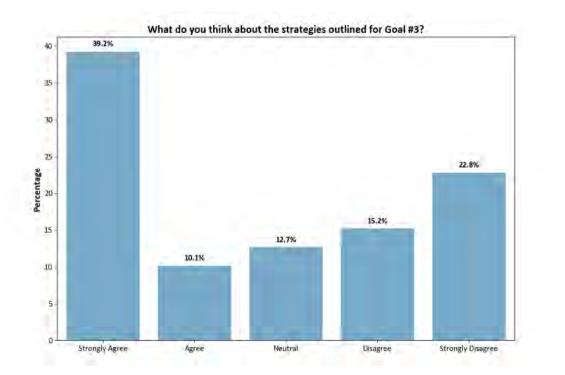
The following summarizes input on Goal #2's strategies:



The strategies for Goal #3 ("Deepen and broaden the Bar's commitment to equitable decision-making") include:

- Authentically engage the public by moving from informing and consulting to involving and collaborating.
- Equip Bar leaders and volunteers to apply an equity lens to their work so equitable decision-making is advanced.
- Facilitate a culture of belonging and inclusion among all Bar entities.
- Create and share accessible and digestible reports on progress on equitable decision-and policymaking.

The following summarizes input on Goal #3's strategies:



The themes from the all the feedback and input can be summarized below:

Support:

- Agreement that the Plan addresses equity gap and emphasizes public engagement.
- Agreement on equity, accessibility, and diversity and belonging focus.
- Positive reception for pipeline programs and affinity group collaboration.

Concerns:

- Language is vague or there are too many "buzz" words.
- Need clearer, measurable actions.
- Need to get perspectives from members throughout the state including areas outside of the I-5 corridor.

Suggestions:

- Add measurable benchmarks, timelines, and review mechanisms for transparency.
- Expand DEI training for judges, employers, and law students.
- Enhance legal service accessibility for underserved and middle-income clients.
- Expand pipeline programs to law schools and high schools.
- Expand resources for underserved communities.
- Emphasize focus on underserved communities like rural areas without legal resources (legal deserts), limited English-speaking people and pro se litigants.

- Address bias and lack of inclusion in law school and beyond (e.g., "good ol' boys' club" culture).
- Reform systems to tackle racism and bias in courts.
- Create ombudsman programs for reporting bias.
- Develop partnerships with law schools for diverse talent pipelines.
- Allocate more resources to affinity groups for goal implementation.

Next Steps

Because we received a significant amount of rich feedback and input, including suggestions to provide more detailed strategies and measures for success, the DEI Council has decided to take the time needed to meaningfully consider the feedback to inform the draft plan we ultimately will present to the Board of Governors. We are planning to present the draft Equity and Justice Plan as a first reading at the BOG meeting in March.

Attachments:

Initial draft Equity and Justice Plan which was sent out for input and feedback

WASHINGTON STATE BAR ASSOCIATION

Date:	April 14, 2025
Re:	FY 2025 Reforecast Budgets
From:	Budget and Audit Committee
То:	Board of Governors

ACTION: Approve the FY 2024 Budget Reforecast.

BACKGROUND

WSBA Fiscal Policies and Procedures provide two options for implementing budget adjustments: reallocation and reforecasting. Budget reallocations that do not impact the bottom line of the budget can happen at any time during the fiscal year. Reallocations are primarily approved by the Executive Director (given dollar amount limits outlined in the policy). This process has been used routinely since it was implemented at the beginning of FY 2023. A budget reforecast is used when needed, typically once in the middle of the year, and is geared towards amending the budget to account for unanticipated events that require more significant changes to the budget and changes the bottom line, typically due to changes in operational needs.

FY 2025 REFORECAST

For FY 2025, we identified changes outlined below that warrant using the reforecast process, including the additional use of Facilities and Special Projects and Innovation fund reserves. The Budget and Audit Committee reviewed and FY 2025 Budget Reforecast at their meeting on April 14, 2025 and voted unanimously to recommend that the Board of Governors approve the FY 2025 Budget Reforecast.

ALL FUNDS BUDGET	BUDGET	REFORECAST	Difference	
REVENUE	\$26,441,960	\$26,416,840	(\$25,120)	
EXPENSE	\$27,991,320	\$28,250,284	+\$258,964	
Direct Expense	\$5,105,545	\$5,109,934	+\$4,389	
Indirect Expense	\$22,885,776	\$23,140,350	+\$254,574	
NET INCOME/(LOSS)	(\$1,549,360)	\$1,549,360) (\$1,833,444)		
Use of Facilities Reserve	\$117,837	\$181,993	+\$64,156	
Use of Special Projects & Innovation Reserve	\$199,962	\$319,028	+\$119,066	
NET INCOME/(LOSS) w/use of Facilities Reserve	(\$1,231,561)	(\$1,332,423)	+\$100,862 ¹	

BUDGET COMPARISON: BUDGET vs REFORECAST

The reforecast includes increases in the use of both Facilities and Special Projects and Innovation Fund reserves. Funds that went unspent in FY24 for the WSBA office downsizing project were rolled over and

¹ A positive number indicates an increase in the net loss amount from Budget to Reforecast.

included in the reforecast budget, resulting in an increase from the original FY25 budgeted use of Facilities reserves. The amount estimated for Special Projects and Innovation reserve use in FY25 was based on costs for the Pathways to Practice project; however, the total amount available in the reserve fund (\$400,000 starting FY25) was earmarked for the Pilot Project for Entity Regulation (in addition to the Pathways project). At the time the FY25 Budget was developed, we did not have enough information about the Entity Regulation project to estimate the budget allocation. Now that we are further along into the fiscal year and project work is underway, we are able to include estimates for this work in the reforecast.

(1) GENERAL FUND

The General Fund captures the majority of WSBA's work, including regulatory functions and most services to members and the public. License fees are the primary source of revenue that support the 39 cost centers within the General Fund. The majority of changes for the reforecast are captured in the General Fund. (*See attachment A for General Fund detailed cost center budgets.*)

General Fund Budget	BUDGET	REFORECAST	Difference	
 Revenue 	\$23,111,227	\$23,266,107	+\$154,880	
 Expenses 	\$24,572,042	\$24,813,982	+\$241,940	
 Net Income/(Loss) 	(\$1,460,815)	(\$1,547,875)	+\$87,060	
 Use of Facilities Reserves 	\$109,065	\$169,206	+\$60,141	
 Use of Special Projects & 	\$199,962	\$319,028	+\$119,066	
Innovation Reserves				
 NET INCOME/(LOSS) w/use of 	(\$1,151,788)	(\$1,059,641)	(\$92,147) ²	
Facilities Reserve				

(2) <u>CLE FUND</u>

The CLE Fund Budget consists of three cost centers: (1) CLE Products; (2) CLE Seminars; and (3) Deskbooks. The CLE fund has changes to revenue and indirect expenses in the reforecast budget. (*See attachment B for CLE Fund detailed cost center budgets.*)

CLE Fund Budget	BUDGET	REFORECAST	Difference	
 Revenue 	\$1,754,710	\$1,574,710	(\$180,000)	
 Expenses 	\$1,689,709 \$1,704,825		+\$15,116	
 Net Income/(Loss) 	\$65,001	(\$130,115)	(\$195,116)	
 Use of Facilities Reserves 	\$7,789	\$11,269	+\$3,480	
 NET INCOME/(LOSS) w/use 				
of Facilities Reserve	\$72,790	(\$118,846)	(\$191,636)	

(3) CLIENT PROTECTION FUND (CPF)

The Client Protection Fund (CPF) is a legally restricted fund created in 1995 by the Washington Supreme Court and WSBA to make gifts to compensate those financially victimized by lawyer dishonesty or failure to account for client funds or property. It is principally funded by an annual assessment on all active members and *pro hac vice* admissions as required by the Washington Supreme Court. The CPF fund has minor changes to indirect expenses in the reforecast budget. (*See attachment C for Client Protection Fund detailed cost center budget.*)

Client Protection Fund Budget

BUDGET

REFORECAST Difference

2

² A negative number indicates a decrease in the net loss amount from Budget to Reforecast.

-	Revenue	\$930,540	\$930,540	\$0
-	Expenses	\$689,364	\$691,271	+\$1,907
•	Net Income/(Loss)	\$241,176	\$239,269	(\$1,907)
•	Use of Facilities Reserves	\$983	\$1,518	+\$535
•	NET INCOME/(LOSS) w/use of			
	Facilities Reserve	\$242,159	\$240,787	(\$1,372)

(4) SECTIONS FUND

The reforecast does not include any changes to Sections budgets.

(5) CAPITAL BUDGET

The capital budget includes items determined to provide value to the organization beyond one year and have a value greater than \$2,500. The types of items WSBA capitalizes usually includes computer hardware, capital labor development of software, equipment, and leasehold improvements. The capital budget has minor changes related to security upgrades in the reforecast budget. (*See attachment D for the Capital Budget.*)

REFORECAST CHANGES

Provided below is a narrative list of the changes between the FY 2025 Budget and Reforecast reflected in the summaries above.

Revenue Changes	Budget Impact
GENERAL FUND:	+\$154,880
New Member Product Sales (NME): YTD revenue over budget by \$32K and	+\$90,000
additional revenue expected from new product release	
 Law Clerk Fees (CLERK): YTD revenue tracking ahead of budget with additional 	+\$30,000
revenue expected throughout the remainder of the year	
 Pro Hac VICE (LICMR): Increased based on anticipated year-end collection 	+\$25,000
Investigation Fees (LICMR): YTD revenue tracking ahead of budget with	+\$5,000
additional revenue expected throughout the remainder of the year	
 Donations & Grants (DIV): Adjusted budget to account for additional in-kind 	+\$2,880
support	
 Member Contact Information Fees (LICMR): YTD revenue tracking ahead of 	+\$2,000
budget with additional revenue expected throughout the remainder of the	
year	
CLE FUND:	(\$180,000)
 Seminar Registrations (CLES): reduced to reflect changing customer product 	(\$100,000)
preference	
 Digital Video Sales (CLEP): reduced to reflect lower actual sales in Q1 	(\$80,000)
Total Decrease in Revenue from original FY 2025 Budget	(\$25,120)

Indirect Expense Changes	Budget Impact
SALARIES:	
• Temporary Employees: increased to support (1) scanning of records as part of	+\$23,583
WSBA space remodel/downsizing and (2) discipline software system upgrade	
BENEFITS:	+2,310
 FICA: increase tied to change in temporary employees salaries expense 	+\$1,994
Unemployment, L&I, and WA Family Leave Insurance: increase tied to change	+\$316
in temporary employees' salaries expense	

OTHER INDIRECTS:	+\$228,681
 Rent: additional funds for assessed leasehold excise tax 	+\$60,000
 Furniture, Office Equipment & LH Imp Deprecation: additional items not included in original budget for tenant improvements for WSBA office downsizing, replacement of two copiers, and adjustment to capital budget for security upgrades 	+\$47,253
 Computer Pooled Expenses: increases for (1) Consulting Services (\$25,000) to assist with completion of discipline software system upgrade and (2) Software Maintenance & Licensing (\$20,000) for additional licenses and applications not originally factored into FY25 budget 	+\$45,000
 Computer Software Depreciation: added internally developed software project that was determined to be completed at end of FY24, but depreciation was not included in FY25 budget 	+\$31,271
 Move/Downsizing Expenses: cost for demolition and liquidation of furniture and equipment carried forward from unspent Facilities Reserve funds in FY24 	+\$28,208
 Records Storage: cost to move offsite storage boxes in house for scanning and destruction of records carried forward from unspent Facilities Reserve funds in FY24 	+\$18,849
 Online Legal Research: additional subscription and licenses for legal research tools 	+\$8,100
Bank Fees: reduced based on anticipated savings to be applied by year-end	(\$10,000)
Total Increase in Indirect Expense from original FY 2025 Budget	+\$254,574

Direct Expense Changes	Budget Impact
GENERAL FUND:	+\$4,389
• Consulting Services (RR): expenses to support work on Pilot Project for Entity	+\$30,000
Regulation, including \$20,000 for application software development and	
\$10,000 for subject matter expert consultations	
 Outreach (RR): expenses to promote and communicate launch of Pilot Project 	+\$10,000
for Entity Regulation	
 Postage (BN): increase in postage rate for magazine mailing 	+\$14,000
 Disability Expenses (DISC): YTD expense tracking ahead of budget and we have 	+\$9,500
had more respondents going through the disability proceedings than expected,	
so budget is increased to allow for additional capacity	
 Consulting Services (LICMR): carry forward of unspent funds for an application 	+\$6,000
development project that was scheduled for completion in FY24 but now is	
expected to finish in FY25	
 Volunteer Recognition (VE): funds for printing of volunteer recognition cards 	+\$2,000
not included in original budget.	
 Supplies (ADMISS): additional supplies needed for Bar Exam 	+\$2,000
 Staff Travel/Parking (PRP): funding for additional outside speaking 	+\$1,000
engagements	
 Litigation Expenses (OGC): YTD expense tracking ahead of budget and we 	+\$800
expect additional expenses from an ongoing case requiring transcription	
 Postage (LICMR): reduction caused by change in mailing class for licensing 	(\$13,652)
notices	
 Depreciation (DISC): eliminated expense due to change in capitalization for 	(\$24,259)
discipline software system upgrade	
 Regulatory School (VE): event held in Q1 and actual expenses were much 	(\$33,000)
lower than originally budgeted	

ATTACHMENTS

А	Reforecast FY25 General Fund Budget
В	Reforecast FY25 CLE Budget
с	Reforecast FY25 CPF Budget
D	Reforecast FY25 Capital Budget

ATTACHMENT A

Washington State Bar Association Financial Summary Fiscal Year 2025 Reforecast

	FY25 Reforecast	FY25 Reforecast Indirect	FY25 Reforecast Direct	FY25 Reforecast Total	FY25 Reforecast Net
Category	Revenues	Expenses	Expenses	Expenses	Result
Access to Justice		249,600	139,795	389,395	(389,395)
Admissions/Bar Exam	1,480,180	883,264	482,204	1,365,468	114,712
Advancement FTE	-	389,327	3,300	392,627	(392,627)
Bar News	589,600	330,063	401,175	731,238	(141,638)
Board of Governors	-	189,084	360,300	549,384	(549,384)
Character & Fitness Board	-	142,068	33,000	175,068	(175,068)
Communications Strategies	600	790,762	180,295	971,057	(970,457)
Communications Strategies FTE	-	250,562	-	250,562	(250,562)
Discipline	90,000 135,000	6,321,864 376,075	201,785 70,900	<u>6,523,649</u> 446,975	(6,433,649) (311,975)
Diversity Finance	600,000	1,160,539	4,920	1,165,459	(565,459)
Foundation	-	167,354	17,800	185,154	(185,154)
Human Resources	-	603,860	-	603,860	(603,860)
Law Clerk Program	237,200	182,873	51,031	233,904	3,296
Legislative	-	256,933	26,275	283,208	(283,208)
Legal Lunchbox	34,000	34,859	4,725	39,584	(5,584)
Licensing and Membership Records	482,200	797,715	28,380	826,095	(343,895)
Licensing Fees	17,492,616	-	-	-	17,492,616
Limited License Legal Technician	25,031	87,784	12,500	100,284	(75,253)
Limited Practice Officers	189,300	105,207	37,304	142,511	46,789
Mandatory CLE	1,233,800	658,717	151,333	810,050	423,750
Member Wellness Program Member Services & Engagement	10,000 16,300	230,041 295,617	<u>11,905</u> 118,900	241,946 414,517	(231,946) (398,217)
Mini CLE	10,300	120,930	118,900	120,930	(120,930)
New Member Education	178,000	108,171	2,600	110,771	67,229
Office of General Counsel	-	1,050,911	26,805	1,077,716	(1,077,716)
Office of the Executive Director	-	855,157	138,975	994,132	(994,132)
OGC-Disciplinary Board	-	200,060	128,500	328,560	(328,560)
Practice of Law Board	-	70,590	16,000	86,590	(86,590)
Practice Management Assistance	62,000	143,475	93,650	237,125	(175,125)
Professional Responsibility Program	-	210,093	7,700	217,793	(217,793)
Public Service Programs	135,280	226,185	310,700	536,885	(401,605)
Publication and Design Services Regulatory Services FTE	-	125,600	5,000 9,490	130,600	(130,600)
Regulatory Reform	-	440,685 236,528	9,490	<u>450,175</u> 319,028	(450,175) (319,028)
Sections Administration	275,000	300,832	2,400	303,232	(28,232)
Service Center	-	735,135	3,053	738,188	(738,188)
Technology	-	2,074,941	-	2,074,941	(2,074,941)
Volunteer Engagement	-	208,256	37,066	245,322	(245,322)
Subtotal General Fund	23,266,107	21,611,716	3,202,266	24,813,982	(1,547,875)
Expenses using reserve funds				(169,206)	169,206
Expenses using special projects				(319,028)	319,028
Total General Fund - Net Result from					
Operations	23,266,107			24,325,747	(1,059,640)
CLE-Seminars and Products	1,443,710	1,064,098	306,112	1,370,210	73,500
CLE-Seminars and Products CLE - Deskbooks	1,443,710	279,665	54,950	334,615	(203,615)
Total CLE	1,574,710	1,343,763	<u>361,062</u>	1,704,825	(130,115)
Expenses using Facilities Reserve funds	-	1,010,700	501,002	(11,269)	11,269
Total CLE Fund - Net Result from Operations	1,574,710			1,693,556	(118,846)
Total All Sections	645,483		1,040,206	1,040,206	(394,722)
Client Protection Fund-Restricted	930,540	184,871	506,400	691,271	239,269
Expenses using Facilities Reserve funds	-			(1,518)	1,518
Total CPF Fund - Net Result from Operations	930,540			689,754	240,786
Totals	26,416,840	23,140,350	5,109,934	28,250,284	(1,833,444)
Totals Net of Use of Facilities Reserve Funds	26,416,840	23,140,350	5,109,934	27,749,263	(1,332,423)

				Was	hington State Ba Budget Compariso			
Cost Center	FY25 REFORECA		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
All	FY24 REFORECA	ST FTE 144.50						
Revenue	40200 40205 40210	COPY FEES DIVERSION RECORDS REQUEST FEES	7,500	10,000	2,500	33%	427 11,050 315	1,500 270
	40300 40500	DONATIONS & GRANTS INTEREST - INVESTMENTS	265,000 847,147	270,280 802,050	5,280 (45,097)	2% -5%	265,000 1,305,951	289,025
	40600 40625	LICENSE FEES LICENSE FEES - NEW ADMITTEES	16,692,574 417,925	16,853,241 429,375	160,667 11,450	1% 3%	16,279,888 423,252	5,180,944 158,071
	40650	LICENSE FEES - LATE FEES	200,000	200,000	-	0%	383,255	412
	40675 40705	LICENSE FEES - REINSTATEMENTS EXAM SOFTWARE REVENUE	10,000 27,500	10,000 27,500	-	0% 0%	27,605 30,615	4,743
	40800 40900	PUBLICATIONS REVENUE ROYALTIES	1,500 75,300	1,250 74,800	(250) (500)	-17% -1%	1,949 83,891	- 21,629
	40950	NME PRODUCT SALES	40,000	150,000	110,000	275%	114,482	92,212
	41000 41100	SHIPPING & HANDLING STATUS CERTIFICATE FEES	300 27,000	210 27,000	(90)	-30% 0%	99 29,600	81 11,125
	41450 41500	SPONSORSHIPS ANNUAL OR OTHER MEETING REV	11,000 4,320	13,500 5,575	2,500 1,255	23% 29%	11,566 4,710	-
	41650	RECEPTIONS REVENUE	-	-	-		2,500	-
	41700 41800	CONFERENCES & INSTITUTES SEMINAR REGISTRATIONS	38,000 842,000	3,738 748,000	(34,262) (94,000)	-90% -11%	3,739 671,186	- 168,699
	41805 41825	MINI-CLE REVENUE SEMINAR REVENUE-OTHER	33,690 20,000	32,890 20,000	(800)	-2% 0%	32,152 51,802	13,325 800
	41850	SEMINAR SPLITS W/ CLE	(7,125)	(10,300)	(3,175)	45%	(0)	-
	41855 41875	CLE SECTION SPLITS PROJECTIONS SEMINAR SPLITS W/ OTHERS	- 11,000	- 20,000	- 9,000	82%	32,231	-
	42207	BAR EXAM FEES	1,160,000	1,280,780	120,780	10%	1,176,215	513,465
	42230 42232	BAR EXAM LATE FEES HOUSE COUNSEL APPLICATION FEES	55,000 45,000	98,200 56,260	43,200 11,260	79% 25%	56,700 33,080	27,000 15,350
	42270 42275	RULE 9/LEGAL INTERN FEES LAW CLERK FEES	12,000 204,000	12,500 234,000	500 30,000	4% 15%	16,950 201,068	1,900 194,500
	42281	LLLT LICENSE FEES	18,562	17,731	(831)	-4%	15,296	5,004
	42285 42286	FOREIGN LAW CONSULTANT FEES LAW CLERK APPLICATION FEES	1,240 3,200	1,940 3,200	700	56% 0%	3,100 5,000	970 2,000
	42287 42288	SPECIAL ADMISSIONS INVESTIGATION FEES	20,200	3,000 25,300	3,000 5,100	25%	6,435 29,300	3,590 11,600
	42290	PRO HAC VICE	400,000	425,000	25,000	6%	496,975	135,623
	42291 42450	LLLT LATE LICENSE FEES AUDIT REVENUE	- 1,000	- 1,000	-	0%	404 170	- 43
	42570 42710	50 YEAR MEMBER TRIBUTE LUNCH BNEWS DISPLAY ADVERTISING	500 400,000	100 405,000	(400) 5,000	-80% 1%	1,900 418,264	140,525
	42720	BNEWS SUBSCRIPT/SINGLE ISSUES	100	100	-	0%	108	72
	42730 42760	BNEWS CLASSIFIED ADVERTISING JOB TARGET ADVERTISING	7,500 200,000	2,500 180,000	(5,000) (20,000)	-67% -10%	2,761 152,139	1,463 27,663
	43100	DESKBOOK SALES (LEXISNEXIS PRINT)	30,000	30,000	-	0%	18,240	-
	43200 43400	COURSEBOOK SALES DIGITAL VIDEO SALES	10,000 920,000	3,500 870,000	(6,500) (50,000)	-65% -5%	1,060 1,057,552	555 533,509
	43450 43455	SECTION PUBLICATION SALES LEXIS/NEXIS ROYALTIES	1,500 75,000	1,000 75,000	(500)	-33% 0%	630 69,907	- 0
	43525	CASEMAKER ROYALTIES	30,000	25,000	(5,000)	-17%	37,575	-
	44100 44350	WSBA LOGO MERCHANDISE SALES RECOVERY OF DISCIPLINE COSTS	- 100,000	500 70,000	500 (30,000)	-30%	2,414 54,568	- 27,297
	44450 44820	DISCIPLINE HISTORY SUMMARY CPF RESTITUTION	18,000 10,000	19,000 10,000	1,000	6% 0%	18,510 27,839	6,840 15,676
	44840	CPF MEMBER ASSESSMENTS	525,930	720,540	194,610	37%	548,235	596,105
	45040 45060	MEMBER CONTACT INFORMATION PHOTO BAR CARD SALES	3,700 200	5,000 200	1,300	35% 0%	5,706 276	2,973 204
	45110 45115	LPO EXAMINATION FEES LPO EXAM LATE FEES	22,000 3,300	20,000 3,000	(2,000) (300)	-9% -9%	18,600 2,300	7,200 1,200
	45120	LPO LICENSE FEES	170,000	160,000	(10,000)	-6%	156,974	50,492
	45125 45210	LPO LATE LICENSE FEES ACTIVITY APPLICATION FEE	2,500 550,000	2,000 600,000	(500) 50,000	-20% 9%	3,600 724,600	- 236,600
	45215	ACTIVITY APPLICATION LATE FEE	220,000	220,000	-	0%	266,650	101,200
	45220 45230	MCLE LATE FEES ANNUAL ACCREDITED SPONSOR FEES	194,150 36,000	229,300 39,000	35,150 3,000	18% 8%	270,525 37,500	68,250 24,000
	45250 45255	ATTENDANCE LATE FEES COMITY CERTIFICATES - REQUEST	90,000 13,800	120,000 13,800	30,000	33% 0%	120,050 13,497	44,450 8,100
	45260	COMITY CERTIFICATES - SUBMIT	14,000	16,000	2,000	14%	16,575	15,925
	47100 48010	TRIAL ADVOCACY PROGRAM REIMBURSEMENTS FROM SECTIONS	12,000 297,786	15,000 275,000	3,000 (22,786)	25% -8%	12,098 275,415	- 323,838
	48200	SECTION DUES REVENUE	438,431	438,280	(151)	0%	425,235	365,036
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT Total Revenue	- 25,881,230	- 26,416,840	535,610	2%	- 26,569,261	141,745 9,594,798
			-0,001,200	-0,110,010	000,010	2 / 0	-0,007,201	7,071,770

5 000 <i>C</i>					
50006	ACCOMMODATION FUND	-	-	-	• 60 /
50015	DEPRECIATION	16,214	12,000	(4,214)	-26%
50020	BANK FEES	3,000	2,500	(500)	-17%
50033	CONSULTING SERVICES	230,550	238,700	8,150	4%
50037	MODERATE MEANS	292,309	300,000	7,691	3%
50050	EQUIPMENT, HARDWARE & SOFTWARE	4,500	2,400	(2,100)	-47%
50060	POSTAGE	129,002	142,000	12,998	10%
50070	PRINTING & COPYING	252,400	265,500	13,100	5%
50080	PUBLICATIONS PRODUCTION	300	350	50	17%
50085	YLL SECTION PROGRAM	1,500	1,300	(200)	-13%
50095	CLE COMPS	1,000	1,000	-	0%
50100	STAFF TRAVEL/PARKING	81,071	108,471	27,400	34%
50110	STAFF CONFERENCE & TRAINING	131,492	137,432	5,940	5%
50120	STAFF MEMBERSHIP DUES	21,818	22,260	442	2%
50130	SUBSCRIPTIONS	10,025	11,346	1,321	13%
50135	TRANSCRIPTION SERVICES	2,100	-	(2,100)	-100%
50140	SUPPLIES	2,750	7,200	4,450	162%
50145	SURVEYS	17,600	-	(17,600)	-100%
50155	DIGITAL/ONLINE DEVELOPMENT	2,000	2,000	(17,000)	0%
				-	
50160	TELEPHONE	100,285	94,575	(5,710)	-6%
50165	CONFERENCE CALLS	2,654	2,207	(447)	-17%
52110	PRO BONO & PUBLIC SERVICE COMMITTEE	2,500	2,500	-	0%
52121	ATJ BOARD RETREAT	4,000	6,000	2,000	50%
52125	LEADERSHIP TRAINING	39,000	41,000	2,000	5%
52140	ATJ BOARD EXPENSE	65,000	58,500	(6,500)	-10%
52210	FACILITY, PARKING, FOOD	100,300	109,500	9,200	9%
52215	EXAMINER FEES	34,000	44,500	10,500	31%
52221	UBE EXAMINATIONS	113,000	118,000	5,000	4%
52225	BOARD OF BAR EXAMINERS	39,000	42,500	3,500	9%
52230	BAR EXAM PROCTORS	21,000	23,000	2,000	10%
52235	CHARACTER & FITNESS BOARD EXP	18,000	18,000	-	0%
52240	DISABILITY ACCOMMODATIONS	70,967	80,000	9,033	13%
				,	
52245	CHARACTER & FITNESS INVESTI	1,100	1,100	-	0%
52250	LAW SCHOOL VISITS	1,700	2,000	300	18%
52255	LAW CLERK BOARD	8,000	8,000	-	0%
52258	LAW CLERK OUTREACH	5,000	30,000	25,000	500%
	DEPRECIATION-SOFTWARE		50,000		
52270		11,038	-	(11,038)	-100%
52511	BAR LEADERS SUMMIT	-	35,000	35,000	
52520	ABA DELEGATES	14,000	16,000	2,000	14%
52521	VOLUNTEER RECOGNITION	-	2,000	2,000	
52540	SECTION/COMMITTEE CHAIR MTGS	1,000	700	(300)	-30%
52570	APEX	50,000	52,500	2,500	5%
52573	50 YEAR MEMBER TRIBUTE LUNCH	30,000	35,000	5,000	17%
52585	WASHINGTON LEADERSHIP INSTITUTE	80,000	100,000	20,000	25%
52590	BAR LEADERS CONFERENCE		-	-	
52660	JUD RECOMMEND COMMITTEE	2,250	2,250		0%
				-	
52680	DEI COUNCIL	3,800	5,900	2,100	55%
52681	DIVERSITY EVENTS & PROJECTS	31,800	43,100	11,300	36%
52683	LLLT BOARD	14,240	11,500	(2,740)	-19%
52687	INTERNAL DIVERSITY OUTREACH	,	7,500	7,500	-,,,
					1110/
52688	EXAM WRITING	9,000	19,000	10,000	111%
52689	LLLT EDUCATION	-	1,000	1,000	
52691	OUTREACH EXPENSES	-	10,000	10,000	
52710	GRAPHICS/ARTWORK	100	1,000	900	900%
52750	EDITORIAL ADVIS COMMITTEE EXP	-	300	300	20070
		100.000			220/
52810	BOG MEETINGS	190,000	148,000	(42,000)	-22%
52812	NEW GOVERNOR ORIENTATION	10,000	10,000	-	0%
52820	BOG COMMITTEES' EXPENSES	2,500	2,000	(500)	-20%
52821	BOG RETREAT	35,000	40,000	5,000	14%
52822	BOG CONFERENCE ATTENDANCE	60,000	39,500	(20,500)	-34%
52823	PRESIDENT'S PHOTO	3,300	3,300	-	0%
52830	BOG TRAVEL & OUTREACH	22,000	50,000	28,000	127%
52840	ED TRAVEL & OUTREACH	4,000	6,000	2,000	50%
52874	PUBLIC DEFENSE	4,000	4,000	-,000	0%
52878	COMMUNICATIONS OUTREACH	15,000	15,000		0%
			-	15 100	
52880	BOG ELECTIONS	26,900	42,000	15,100	56%
52891	LONG RANGE STRATEGIC PLANNING COUNC	600	-	(600)	-100%
52940	BOARD OF TRUSTEES	3,250	3,600	350	11%
52960	PRESIDENT'S DINNER	15,000	10,000	(5,000)	-33%
53210	COST OF SALES - DESKBOOKS	4,000	5,000	1,000	25%
				,	
53220	COST OF SALES - COURSEBOOKS	1,100	300	(800)	-73%
53225	COST OF SALES - SECTION PUBLIC	500	500	-	0%
53250	A/V DEVELOP COSTS (RECORDING)	-	-	-	
53260	OBSOLETE INVENTORY	21,000	48,250	27,250	130%
53255	CLE-EQUIP-DEPRECIATION	2,040	2,012	(28)	-1%
				(20)	
53265	SPLITS TO SECTIONS	300	300	-	0%
53270	DESKBOOK ROYALTIES	300	300	-	0%
53280	ONLINE EXPENSES	-	-	-	
53282	SOFTWARE HOSTING	60,500	68,074	7,574	13%
53283	ON24 OVERAGE CHARGE	4,500	4,500	.,	0%
				1 000	
53285	ONLINE PRODUCT HOSTING EXPENSES	53,000	54,000	1,000	2%
53320	POSTAGE & DELIVERY-DESKBOOKS	-	300	300	
53330	POSTAGE & DELIVRY-COURSEBOOKS	500	200	(300)	-60%
53610	COURSEBOOK PRODUCTION	500	500	-	0%
53620	POSTAGE - FLIERS/CATALOGS	200	000		070
		2 000	- 2 000	-	00/
53640	ACCREDITATION FEES	3,000	3,000	-	0%
53660	SEMINAR BROCHURES	-	-	-	
53690	FACILITIES	160,500	165,000	4,500	3%
53700	SPEAKERS & PROGRAM DEVELOP	45,100	48,100	3,000	7%
53730	HONORARIUM	4,500	4,500	-	0%
33730		4,500	4,500	-	070

Direct

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	-
- (3.210)	- (1,919
(3,210) 337,934	62,142
278,889	78,441
6,012 139,745	878 47,219
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129	- 555
-	-
67,586 86,719	8,756 24,209
16,362	11,606
9,205	4,499
3,007	2,793
17,500 572	-
89,645	30,299
940 782	230
2,718	2,371
21,847 41,683	1,425 20,936
132,934	- 9,000
31,500 134,108	9,000
22,040 13,737	-
2,064	3,022
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1,379	-
5,716 5,476	1,440
10,697	-
- 18,649	-
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80 47,315	-
25,600	-
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3,948 11,016	79 3,670
1,341	368
8,400	4,200
-	35
1,103	35 - -
1,103 20 164,195	35 - - 25,436
20 164,195 2,570	25,436
20 164,195 2,570 18 30,180	- 25,436 3,628 37,745
20 164,195 2,570 18 30,180 55,335	- 25,436 3,628
20 164,195 2,570 18 30,180 55,335 1,652 28,413	25,436 3,628 37,745 2,583 6,723
20 164,195 2,570 18 30,180 55,335 1,652 28,413 5,601	25,436 3,628 37,745 2,583 6,723 406
20 164,195 2,570 18 30,180 55,335 1,652 28,413 5,601 2,213 3,956	25,436 3,628 37,745 2,583 6,723
20 164,195 2,570 18 30,180 55,335 1,652 28,413 5,601 2,213	25,436 3,628 37,745 2,583 6,723 406 2,279
20 164,195 2,570 18 30,180 55,335 1,652 28,413 5,601 2,213 3,956 12,545 - 1,245	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456 - - 62
20 164,195 2,570 18 30,180 55,335 1,652 28,413 5,601 2,213 3,956 12,545 - 1,245 11,129 5,154	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456
$\begin{array}{c} 20\\ 164,195\\ 2,570\\ 18\\ 30,180\\ 55,335\\ 1,652\\ 28,413\\ 5,601\\ 2,213\\ 3,956\\ 12,545\\ -\\ 1,245\\ 11,129\\ 5,154\\ 69\\ \end{array}$	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456 - - 62
20 164,195 2,570 18 30,180 55,335 1,652 28,413 5,601 2,213 3,956 12,545 - 1,245 11,129 5,154 69 429 -	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456
$\begin{array}{c} 20\\ 164,195\\ 2,570\\ 18\\ 30,180\\ 55,335\\ 1,652\\ 28,413\\ 5,601\\ 2,213\\ 3,956\\ 12,545\\ -\\ 1,245\\ 11,129\\ 5,154\\ 69\\ 429\\ -\\ 6,927\\ \end{array}$	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456 - - - - - - - - - - - - - - - - - - -
$\begin{array}{c} 20\\ 164,195\\ 2,570\\ 18\\ 30,180\\ 55,335\\ 1,652\\ 28,413\\ 5,601\\ 2,213\\ 3,956\\ 12,545\\ -\\ 1,245\\ 11,129\\ 5,154\\ 69\\ 429\\ -\\ 6,927\\ 2,040\\ 185\\ \end{array}$	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456
$\begin{array}{c} 20\\ 164,195\\ 2,570\\ 18\\ 30,180\\ 55,335\\ 1,652\\ 28,413\\ 5,601\\ 2,213\\ 3,956\\ 12,545\\ -\\ 1,245\\ 11,129\\ 5,154\\ 69\\ 429\\ -\\ 6,927\\ 2,040\\ \end{array}$	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456 - - - - - - - - - - - - - - - - - - -
$\begin{array}{c} 20\\ 164,195\\ 2,570\\ 18\\ 30,180\\ 55,335\\ 1,652\\ 28,413\\ 5,601\\ 2,213\\ 3,956\\ 12,545\\ -\\ 1,245\\ 11,129\\ 5,154\\ 69\\ 429\\ -\\ 6,927\\ 2,040\\ 185\\ 305\\ (0)\\ 64,420\\ \end{array}$	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456 - 62 0 - 38
$\begin{array}{c} 20\\ 164,195\\ 2,570\\ 18\\ 30,180\\ 55,335\\ 1,652\\ 28,413\\ 5,601\\ 2,213\\ 3,956\\ 12,545\\ -\\ 1,245\\ 11,129\\ 5,154\\ 69\\ 429\\ -\\ 6,927\\ 2,040\\ 185\\ 305\\ (0)\\ \end{array}$	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456 - - - - - - - - - - - - - - - - - - -
$\begin{array}{c} 20\\ 164,195\\ 2,570\\ 18\\ 30,180\\ 55,335\\ 1,652\\ 28,413\\ 5,601\\ 2,213\\ 3,956\\ 12,545\\ -\\ 1,245\\ 11,129\\ 5,154\\ 69\\ 429\\ -\\ 6,927\\ 2,040\\ 185\\ 305\\ (0)\\ 64,420\\ 6,067\\ 49,000\\ -\\ \end{array}$	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456 - - - - - - - - - - - - - - - - - - -
$\begin{array}{c} 20\\ 164,195\\ 2,570\\ 18\\ 30,180\\ 55,335\\ 1,652\\ 28,413\\ 5,601\\ 2,213\\ 3,956\\ 12,545\\ -\\ 1,245\\ 11,129\\ 5,154\\ 69\\ 429\\ -\\ 6,927\\ 2,040\\ 185\\ 305\\ (0)\\ 64,420\\ 6,067\\ \end{array}$	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456 - - - - - - - - - - - - - - - - - - -
$\begin{array}{c} 20\\ 164,195\\ 2,570\\ 18\\ 30,180\\ 55,335\\ 1,652\\ 28,413\\ 5,601\\ 2,213\\ 3,956\\ 12,545\\ -\\ 1,245\\ 11,129\\ 5,154\\ 69\\ 429\\ -\\ 6,927\\ 2,040\\ 185\\ 305\\ (0)\\ 64,420\\ 6,067\\ 49,000\\ -\\ 43\\ \end{array}$	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456 - - - - - - - - - - - - - - - - - - -
$\begin{array}{c} 20\\ 164,195\\ 2,570\\ 18\\ 30,180\\ 55,335\\ 1,652\\ 28,413\\ 5,601\\ 2,213\\ 3,956\\ 12,545\\ -\\ 1,245\\ 11,129\\ 5,154\\ 69\\ 429\\ -\\ 6,927\\ 2,040\\ 185\\ 305\\ (0)\\ 64,420\\ 6,067\\ 49,000\\ -\\ 43\\ 18\\ -\\ 1,822\\ -\\ \end{array}$	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456 - - - - - - - - - - - - - - - - - - -
$\begin{array}{c} 20\\ 164,195\\ 2,570\\ 18\\ 30,180\\ 55,335\\ 1,652\\ 28,413\\ 5,601\\ 2,213\\ 3,956\\ 12,545\\ -\\ 1,245\\ 11,129\\ 5,154\\ 69\\ 429\\ -\\ 6,927\\ 2,040\\ 185\\ 305\\ (0)\\ 64,420\\ 6,067\\ 49,000\\ -\\ 43\\ 18\\ -\\ \end{array}$	25,436 3,628 37,745 2,583 6,723 406 2,279 1,456 62 0 38

53731	INSURANCE REBATE	(425)	(3,375)	(2,950)	694%
53740	CLE SEMINAR COMMITTEE	200	200	-	0%
54026	IMAGE LIBRARY	4,100	4,800	700	17%
54027	BAR OUTREACH	18,000	20,000	2,000	11%
54130	PRO BONO OUTREACH	2,000	4,000	2,000	100%
54310	COURT REPORTERS	75,500	100,000	24,500	32%
54320	OUTSIDE COUNSEL EXPENSES		1,000	24,500	0%
		1,000		-	
54360	LITIGATION EXPENSES	40,200	41,000	800	2%
54370	DISABILITY EXPENSES	9,000	15,000	6,000	67%
54391	LAW LIBRARY DESKBOOK ACCESS	-	10,000	10,000	
54400	TRANSLATION SERVICES	1,000	12,000	11,000	1100%
54430	PRACTICE MONITOR EXPENSES	-	-	-	
54512	STAFF TRAINING- GENERAL	12,912	36,800	23,888	185%
54520	RECRUITING AND ADVERTISING	8,000	8,000	-	0%
54530	PAYROLL PROCESSING	50,000	50,000	-	0%
54540	SALARY SURVEYS	1,500	1,000	(500)	-33%
54590	TRANSFER TO INDIRECT EXPENSE	(77,112)	(111,300)	(34,188)	44%
	LIBRARY MATERIALS/RESOURCES			(34,100)	
54610		4,000	4,000	-	0%
54645	LEGAL TECH TASK FORCE	-	5,000	5,000	2250/
54715	WELL BEING TASK FORCE	1,000	4,250	3,250	325%
54810	GIFTS TO INJURED CLIENTS	500,000	500,000	-	0%
54820	CPF BOARD	2,000	2,000	-	0%
54910	RENT - OLYMPIA OFFICE	1,500	-	(1,500)	-100%
54920	CONTRACT LOBBYIST	12,500	15,000	2,500	20%
54940	LEGISLATIVE COMMITTEE	1,250	1,250	-	0%
54970	BOG LEGISLATIVE COMMITTEE	300	300	-	0%
55010	LICENSING FORMS	-	-	-	
55110	LPO EXAM FACILITIES	_	-	_	
55130	LPO BOARD EXPENSES	4,000	4,000	_	0%
55165	LPO OUTREACH	1,000	1,000		0%
				- (1.000)	
55210	MCLE BOARD EXPENSES	5,000	4,000	(1,000)	-20%
55220	DEPRECIATION-SOFTWARE	130,449	142,183	11,734	9%
55250	CASEMAKER/FASTCASE	75,000	85,000	10,000	13%
55265	SPEAKERS & PROGRAM DEVELOPMENT	250	575	325	130%
55266	NEW LAWYER OUTREACH EVENTS	1,500	5,000	3,500	233%
55270	NEW LAWYERS COMMITTEE	13,500	15,000	1,500	11%
55285	OPEN SECTIONS NIGHT	-	-	-	
55310	DISCIPLINARY BOARD EXPENSES	4,000	5,000	1,000	25%
55320	CHIEF HEARING OFFICER	40,000	40,000	-	0%
55330	HEARING OFFICER EXPENSES	4,000	4,000	_	0%
55340	HEARING OFFICER TRAINING	400	1,000	600	150%
55370	APPOINTED COUNSEL	48,000	50,400		5%
		·		2,400	
55380	DISCIPLINARY SELECTION PANEL	1,000	1,000	-	0%
55419	COURT RULES COMMITTEE	1,000	1,000	-	0%
55510	PRACTICE OF LAW BOARD	12,000	16,000	4,000	33%
	NEW EVDENCE ACCOUNT NEEDED	_	-	_	
55555	NEW EXPENSE ACCOUNT NEEDED	-	-	-	
55555 55610	CPE COMMITTEE	1,000	1,000	-	0%
55610	CPE COMMITTEE	·	1,000	-	
55610 55615	CPE COMMITTEE WILLS	2,000	1,000 2,000	-	0%
55610 55615 55620	CPE COMMITTEE WILLS CUSTODIANSHIP	2,000 5,000	1,000 2,000 5,000		0% 0%
55610 55615 55620 55970	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL	2,000 5,000 1,000	1,000 2,000 5,000 500	(500)	0% 0% -50%
55610 55615 55620	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL	2,000 5,000	1,000 2,000 5,000	(500) 2,500	0% 0%
55610 55615 55620 55970 55980	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL	2,000 5,000 1,000 5,000	1,000 2,000 5,000 500 7,500	2,500	0% 0% -50% 50%
55610 55615 55620 55970 55980 55981	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES	2,000 5,000 1,000 5,000 55,000	1,000 2,000 5,000 500 7,500 65,000	2,500 10,000	0% 0% -50% 50% 18%
55610 55615 55620 55970 55980 55981 55911	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE	2,000 5,000 1,000 5,000 55,000 82,000	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ 65,000\\ 130,000\\ \end{array} $	2,500	0% 0% -50% 50% 18% 59%
55610 55615 55620 55970 55980 55981 55911 56100	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE	2,000 5,000 1,000 5,000 55,000 82,000 66,200	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ 65,000\\ 130,000\\ 66,200\\ \end{array} $	2,500 10,000 48,000	0% 0% -50% 50% 18% 59% 0%
55610 55615 55620 55970 55980 55981 55911 56100 56150	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ \end{array} $	2,500 10,000	0% 0% -50% 50% 18% 59% 0% 61%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ 65,000\\ 130,000\\ 66,200\\ \end{array} $	2,500 10,000 48,000	0% 0% -50% 50% 18% 59% 0% 61% 0%
55610 55615 55620 55970 55980 55981 55911 56100 56150	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ \end{array} $	2,500 10,000 48,000	0% 0% -50% 50% 18% 59% 0% 61%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ \end{array} $	2,500 10,000 48,000 - 200,000	0% 0% -50% 50% 18% 59% 0% 61% 0%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000 380,000	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ - \end{array} $	2,500 10,000 48,000 200,000 20,000	0% 0% -50% 50% 18% 59% 0% 61% 0% 5%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000 380,000	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ -\\ 65,000\\ \end{array} $	2,500 10,000 48,000 - 200,000 - 20,000 - 55,000	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56900	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES	$2,000 \\ 5,000 \\ 1,000 \\ 5,000 \\ 55,000 \\ 82,000 \\ 66,200 \\ 330,000 \\ 50,000 \\ 380,000 \\ - \\ 10,000 \\ (1,185,400)$	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ -\\ 65,000\\ (1,478,500)\\ \end{array} $	2,500 10,000 48,000 - 200,000 - 20,000 - 55,000 (293,100)	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56525 56230 56550 56500 56550 56900 57320	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000 380,000	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ -\\ 65,000\\ (1,478,500)\\ 2,025\\ \end{array} $	2,500 10,000 48,000 200,000 20,000 55,000 (293,100) 525	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56525 56230 56550 56550 56550 56900 57320 57450	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL	$2,000 \\ 5,000 \\ 1,000 \\ 5,000 \\ 55,000 \\ 82,000 \\ 66,200 \\ 330,000 \\ 50,000 \\ 380,000 \\ - \\ 10,000 \\ (1,185,400)$	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ -\\ 65,000\\ (1,478,500)\\ 2,025\\ 12,000\\ \end{array} $	2,500 10,000 48,000 200,000 20,000 55,000 (293,100) 525 12,000	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56500 56550 56900 57320 57450 57460	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000 380,000 - - 10,000 (1,185,400) 1,500 -	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 - 55,000 (293,100) 525 12,000 500	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56500 56550 56900 57320 57450 57460 58125	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000 380,000 - - 10,000 (1,185,400) 1,500 - - 24,200	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$ $\begin{array}{c} 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ \end{array}$ $\begin{array}{c} -\\ 65,000\\ (1,478,500)\\ 2,025\\ 12,000\\ 500\\ 22,700\\ \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 - 55,000 (293,100) 525 12,000 500 (1,500)	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56500 56550 56900 57320 57450 57460 58125 58150	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS	$2,000 \\ 5,000 \\ 1,000 \\ 5,000 \\ 55,000 \\ 82,000 \\ 66,200 \\ 330,000 \\ 50,000 \\ 380,000 \\ - \\ 10,000 \\ (1,185,400) \\ 1,500 \\ - \\ 24,200 \\ 1,550 \\ $	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 - 55,000 (293,100) 525 12,000 500 (1,500) 650	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56550 56900 57320 57450 57460 58125 58150 58175	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \end{array}$ $\begin{array}{c} 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \end{array}$ $\begin{array}{c} \\ 10,000\\ (1,185,400)\\ 1,500\\ \end{array}$ $\begin{array}{c} \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\$	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array} $ $ \begin{array}{r} 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ \hline \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ $	2,500 10,000 48,000 - 200,000 - 20,000 - 55,000 (293,100) 525 12,000 500 (1,500) 650 (2,450)	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP	$2,000 \\ 5,000 \\ 1,000 \\ 5,000 \\ 55,000 \\ 82,000 \\ 66,200 \\ 330,000 \\ 50,000 \\ 380,000 \\ - \\ 10,000 \\ (1,185,400) \\ 1,500 \\ - \\ 24,200 \\ 1,550 \\ $	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array} $ $ \begin{array}{r} 65,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ \hline \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ $	2,500 10,000 48,000 - 200,000 - 20,000 (293,100) 525 12,000 500 (1,500) 650 (2,450) (2,000)	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56500 56550 56500 57460 57460 58125 58150 58175 58200 58225	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSE	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \end{array}$ $\begin{array}{c} 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \end{array}$ $\begin{array}{c} -\\ 10,000\\ (1,185,400)\\ 1,500\\ -\\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ -\\ \end{array}$	$ \begin{array}{r} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array} $ $ \begin{array}{r} 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ \hline \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ $	2,500 10,000 48,000 -200,000 20,000 -55,000 (293,100) 525 12,000 500 (1,500) (2,450) (2,000) 30,000	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSE EXECUTIVE COMMITTEE EXPENSES	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \end{array}$ $\begin{array}{c} 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \end{array}$ $\begin{array}{c} -\\ 10,000\\ (1,185,400)\\ 1,500\\ \end{array}$ $\begin{array}{c} -\\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 -200,000 -20,000 -55,000 (293,100) 525 12,000 500 (1,500) (2,450) (2,000) 30,000 190	0% 0% -50% 50% 18% 59% 0% 61% 0% 55% 550% 25% 35% -6% 42% -30% -33% 0%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMM EXP - OTHER	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \end{array}$ $\begin{array}{c} 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ 70,080\\ 54,000\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 (293,100) 525 12,000 500 (1,500) 650 (2,450) (2,000) 30,000 190 4,500	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMM EXP - OTHER HONORARIUM	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \end{array}$ $\begin{array}{c} 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ 70,080\\ 54,000\\ 8,100\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 (293,100) 525 12,000 (1,500) 650 (2,450) (2,000) 30,000 190 4,500 1,000	0% 0% 50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMM EXP - OTHER	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \end{array}$ $\begin{array}{c} 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ 70,080\\ 54,000\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 (293,100) 525 12,000 500 (1,500) 650 (2,450) (2,000) 30,000 190 4,500	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMM EXP - OTHER HONORARIUM	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \end{array}$ $\begin{array}{c} 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ 70,080\\ 54,000\\ 8,100\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 (293,100) 525 12,000 (1,500) 650 (2,450) (2,000) 30,000 190 4,500 1,000	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56500 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315 58325 58326	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMM EXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \end{array}$ $\begin{array}{c} 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ \hline \\ 70,080\\ 54,000\\ 8,100\\ 91,830\\ 2,000\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 - 55,000 (293,100) 525 12,000 500 (1,500) 650 (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) -	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315 58325 58326 58350	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMM EXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000 380,000 - 10,000 (1,185,400) 1,500 - 24,200 1,550 8,260 6,000 - 70,080 54,000 8,100 91,830 2,000 29,295	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 - 200,000 20,000 20,000 (293,100) 525 12,000 500 (1,500) 650 (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) - 9,275	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56500 56500 56550 56400 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315 58325 58326 58350 58375	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER HARDWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMM EXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000 380,000 - 10,000 (1,185,400) 1,500 - 24,200 1,550 8,260 6,000 - 70,080 54,000 8,100 91,830 2,000 29,295 13,550	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 -200,000 20,000 20,000 (293,100) 525 12,000 500 (1,500) (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) -200,000 -200,000 -200,000 -200,000 -200,000 -200,000 -200,000 -200,000 -200,000 -200,000 (293,100) 525 12,000 500 (1,500) (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) -200,000	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -30% -33% 0% 8% 12% -2% 0% 32% 10%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315 58325 58325 58326 58375 58400	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMM EXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000 380,000 - 10,000 (1,185,400) 1,500 - 24,200 1,550 8,260 6,000 - 70,080 54,000 8,100 91,830 2,000 29,295	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 - 200,000 20,000 20,000 (293,100) 525 12,000 500 (1,500) 650 (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) - 9,275	0% 0% -50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315 58325 58326 58350 58375 58400 58415	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMM EXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE FISCAL/MEMBERSHIP YEAR ADJUSTMENT	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000 380,000 - 10,000 (1,185,400) 1,500 - 24,200 1,550 8,260 6,000 - 70,080 54,000 8,100 91,830 2,000 29,295 13,550 284,470 -	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \hline \\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ \hline \\ \\ 65,000\\ (1,478,500)\\ 2,025\\ 12,000\\ 500\\ 22,700\\ 2,200\\ 5,810\\ 4,000\\ 30,000\\ 70,270\\ 58,500\\ 9,100\\ 89,910\\ 2,000\\ 38,570\\ 14,950\\ 280,433\\ \hline \end{array}$	2,500 10,000 48,000 -200,000 20,000 20,000 55,000 (293,100) 525 12,000 500 (1,500) (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) -9,275 1,400 (4,037)	0% 0% 50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58225 58300 58305 58315 58325 58326 58350 58375 58400 58415 58450	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \end{array}$ $\begin{array}{c} 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ \hline \\ 70,080\\ 54,000\\ 8,100\\ 91,830\\ 2,000\\ 29,295\\ 13,550\\ 284,470\\ \hline \\ 44,810\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \hline \\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ \hline \\ \\ -\\ 65,000\\ (1,478,500)\\ 2,025\\ 12,000\\ 500\\ 22,700\\ 2,200\\ 5,810\\ 4,000\\ 30,000\\ 70,270\\ 58,500\\ 9,100\\ 89,910\\ 2,000\\ 38,570\\ 14,950\\ 280,433\\ \hline \\ 62,510\\ \end{array}$	2,500 10,000 48,000 -200,000 -20,000 20,000 -55,000 (293,100) 525 12,000 500 (1,500) 650 (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) -9,275 1,400 (4,037) -17,700	0% 0% 50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1% 40%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315 58325 58326 58350 58375 58400 58415 58450 58500	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMM EXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE FISCAL/MEMBERSHIP YEAR ADJUSTMENT RECEPTION/FORUM EXPENSE NEW LAWYER OUTREACH	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \hline \\ 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ \\ \hline \\ 70,080\\ 54,000\\ 8,100\\ 91,830\\ 2,000\\ 29,295\\ 13,550\\ 284,470\\ \hline \\ \\ 44,810\\ 6,320\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 5,000\\ 7,500\\ \end{array}$	2,500 10,000 48,000 -200,000 -20,000 -20,000 -55,000 (293,100) 525 12,000 500 (1,500) 650 (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) -9,275 1,400 (4,037) -17,700 (1,100)	0% 0% 50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1% 40% -17%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56500 56500 56500 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58305 58315 58325 58326 58350 58375 58400 58415 58450 58500 58525	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMEXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE FISCAL/MEMBERSHIP YEAR ADJUSTMENT RECEPTION/FORUM EXPENSE NEW LAWYER OUTREACH SCHOLARSHIPS/DONATIONS/GRANT	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \hline \\ 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ \\ \hline \\ 70,080\\ 54,000\\ 8,100\\ 91,830\\ 2,000\\ 29,295\\ 13,550\\ 284,470\\ \hline \\ \\ 44,810\\ 6,320\\ 172,700\\ \end{array}$	$ \begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array} $	2,500 10,000 48,000 - 200,000 20,000 20,000 (293,100) 525 12,000 500 (1,500) 650 (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) - 9,275 1,400 (4,037) - 17,700 (1,100) 47,500	0% 0% 50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1% 40% -1% 28%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56500 56500 56500 57450 57460 58125 58150 58175 58200 58225 58300 58305 58305 58305 58315 58325 58326 58350 58375 58400 58415 58450 58550	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMEXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE FISCAL/MEMBERSHIP YEAR ADJUSTMENT RECEPTION/FORUM EXPENSE NEW LAWYER OUTREACH SCHOLARSHIPS/DONATIONS/GRANT SECTION COMMITTEE EXPENSE	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000 380,000 - 10,000 (1,185,400) 1,500 - 24,200 1,550 8,260 6,000 - 70,080 54,000 8,100 91,830 2,000 29,295 13,550 284,470 - 44,810 6,320 172,700 2,500	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 - 200,000 20,000 - 20,000 (293,100) 525 12,000 500 (1,500) 650 (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) - 9,275 1,400 (4,037) - 17,700 (1,100) 47,500 (500)	0% 0% 50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1% 40% -1% 28% -20%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315 58325 58326 58350 58375 58450 58450 58450 58550 58500 58525 58500 58500 58525 58450 58500 58500 58525 58450 58500 58500 58550 58500 58500 58500 58500 58550 58450 58450 58500 58550 58450 58500 58550 58500 58550 58305 58350 58350 58355 58350 58350 58355 58450 58550 58500 58550 58550 58500 58550 58550 58355 58350 58355 58350 58355 58450 58550 58600	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSE EXECUTIVE COMMITTEE EXPENSE EXECUTIVE COMMITTEE EXPENSE EXECUTIVE COMM EXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE FISCAL/MEMBERSHIP YEAR ADJUSTMENT RECEPTION/FORUM EXPENSE NEW LAWYER OUTREACH SCHOLARSHIPS/DONATIONS/GRANT SECTION COMMITTEE EXPENSE SECTION SPECIAL PROJECTS	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 -200,000 20,000 -55,000 (293,100) 525 12,000 500 (1,500) (2,450) (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) -9,275 1,400 (4,037) -17,700 (1,100) 47,500 (500) (6,400)	0% 0% 50% 50% 18% 59% 0% 61% 0% 550% 25% 35% -6% 42% -30% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1% 40% -17% 28% -20% -44%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56500 56500 56500 57450 57460 58125 58150 58175 58200 58225 58300 58305 58305 58305 58315 58325 58326 58350 58375 58400 58415 58450 58550	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMEXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE FISCAL/MEMBERSHIP YEAR ADJUSTMENT RECEPTION/FORUM EXPENSE NEW LAWYER OUTREACH SCHOLARSHIPS/DONATIONS/GRANT SECTION COMMITTEE EXPENSE	2,000 5,000 1,000 5,000 55,000 82,000 66,200 330,000 50,000 380,000 - 10,000 (1,185,400) 1,500 - 24,200 1,550 8,260 6,000 - 70,080 54,000 8,100 91,830 2,000 29,295 13,550 284,470 - 44,810 6,320 172,700 2,500	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 - 200,000 20,000 - 20,000 (293,100) 525 12,000 500 (1,500) 650 (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) - 9,275 1,400 (4,037) - 17,700 (1,100) 47,500 (500)	0% 0% 50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1% 40% -1% 28% -20%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315 58325 58326 58350 58375 58450 58450 58450 58550 58500 58525 58500 58500 58525 58450 58500 58500 58525 58450 58500 58500 58550 58500 58500 58500 58500 58550 58450 58450 58500 58550 58450 58500 58550 58500 58550 58305 58350 58350 58355 58350 58350 58355 58450 58550 58500 58550 58550 58500 58550 58550 58355 58350 58355 58350 58355 58450 58550 58600	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSE EXECUTIVE COMMITTEE EXPENSE EXECUTIVE COMMITTEE EXPENSE EXECUTIVE COMM EXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE FISCAL/MEMBERSHIP YEAR ADJUSTMENT RECEPTION/FORUM EXPENSE NEW LAWYER OUTREACH SCHOLARSHIPS/DONATIONS/GRANT SECTION COMMITTEE EXPENSE SECTION SPECIAL PROJECTS	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 500\\ 7,500\\ \end{array}$	2,500 10,000 48,000 -200,000 20,000 -55,000 (293,100) 525 12,000 500 (1,500) (2,450) (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) -9,275 1,400 (4,037) -17,700 (1,100) 47,500 (500) (6,400)	0% 0% 50% 50% 18% 59% 0% 61% 0% 550% 25% 35% -6% 42% -30% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1% 40% -17% 28% -20% -44%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315 58325 58326 58350 58375 58400 58415 58450 5850 5850 5850 5850 5850 5850 5850 58375 58400 58415 58450 5850 5850 5850 5850 5850 5850 5850 5850 5850 58375 58400 58415 58450 5850 5850 5850 5850 5850 5850 5850 58375 58400 58375 58400 58415 58450 5850 5850 5850 5850 5850 5850 5850 58375 58400 58415 5850 5850 5850 5850 5850 5850 5850 5850 58375 58400 58415 58450 5850 5850 5850 5850 5850 5850 5850 5850 5850 58375 58400 58555 5850 5850 5850 5850 5850 5850 5850 58375 58400 58555 5850 58600 58615 58620	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER ARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSE EXECUTIVE COMMITTEE EXPENSE EXECUTIVE COMMITTEE EXPENSE EXECUTIVE COMM EXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE FISCAL/MEMBERSHIP YEAR ADJUSTMENT RECEPTION/FORUM EXPENSE NEW LAWYER OUTREACH SCHOLARSHIPS/DONATIONS/GRANT SECTION COMMITTEE EXPENSE SECTION SPECIAL PROJECTS LAW SCHOOL OUTREACH	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \hline \\ 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ \\ 70,080\\ 54,000\\ 8,100\\ 91,830\\ 2,000\\ 29,295\\ 13,550\\ 284,470\\ \hline \\ \\ 44,810\\ 6,320\\ 172,700\\ 2,500\\ 14,420\\ 14,310\\ 53,804\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 5,000\\ 7,500\\ \hline \\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ \hline \\ \\ -\\ 65,000\\ (1,478,500)\\ 2,025\\ 12,000\\ 500\\ 22,700\\ 2,200\\ 5,810\\ 4,000\\ 30,000\\ 70,270\\ 58,500\\ 9,100\\ 89,910\\ 2,000\\ 38,570\\ 14,950\\ 280,433\\ \hline \\ 62,510\\ 5,220\\ 220,200\\ 2,000\\ 8,020\\ 27,510\\ 50,516\\ \hline \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 - 55,000 (293,100) 525 12,000 500 (1,500) (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) - 9,275 1,400 (4,037) - 17,700 (1,100) 47,500 (500) (6,400) 13,200 (3,288)	0% 0% 50% 50% 18% 59% 0% 61% 0% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1% 40% -17% 28% -20% -44% 92% -6%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56500 56500 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315 58325 58326 58350 58375 58400 58415 58450 58500 58525 58500 58500 58525 58500 58525 58500 58525 58500 58525 58500 58525 58500 58525 58500 58525 58500 58525 58500 58525 58500 58525 58500 58525 58500 58525 58500 58525 58500 58525 58500 58525 58500 58550 58500 58375 58400 58555 58500 58550 58500 58555 58500 58555 58500 58555 58500 58555 58500 58555 58500 58555 58550 58500 58555 58550 58550 58500 58555 58550 58550 58550 58555 58550 58550 58550 58555 58550 58550 58550 58555 58550 58550 58550 58555 58550 58550 58555 58550 58550 58550 58555 58550 58620 58625 58620 58625	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSE EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMEXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE FISCAL/MEMBERSHIP YEAR ADJUSTMENT RECEPTION/FORUM EXPENSE NEW LAWYER OUTREACH SCHOLARSHIPS/DONATIONS/GRANT SECTION SPECIAL PROJECTS LAW SCHOOL OUTREACH MINI-CLE EXPENSE SEMINAR EXPENSE - SECTIONS	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \hline \\ 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ \\ \\ 70,080\\ 54,000\\ 8,100\\ 91,830\\ 2,000\\ 29,295\\ 13,550\\ 284,470\\ \hline \\ \\ 44,810\\ 6,320\\ 172,700\\ 2,500\\ 14,420\\ 14,310\\ 53,804\\ 111,633\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 5,000\\ 500\\ 7,500\\ \hline \\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ \hline \\ \\ - \\ 65,000\\ (1,478,500)\\ 2,025\\ 12,000\\ 500\\ 22,700\\ 2,200\\ 5,810\\ 4,000\\ 30,000\\ 70,270\\ 58,500\\ 9,100\\ 89,910\\ 2,000\\ 58,500\\ 9,100\\ 89,910\\ 2,000\\ 38,570\\ 14,950\\ 280,433\\ \hline \\ 62,510\\ 5,220\\ 220,200\\ 2,000\\ 8,020\\ 27,510\\ 50,516\\ 76,000\\ \hline \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 - 55,000 (293,100) 525 12,000 500 (1,500) (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) - 9,275 1,400 (4,037) - 17,700 (1,100) 47,500 (500) (6,400) 13,200 (3,288) (35,633)	0% 0% 50% 50% 18% 59% 0% 61% 0% 55% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1% 40% -1% 40% -1% 28% -20% -44% 92% -6% -32%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58225 58300 58305 58315 58325 58326 58350 58375 58400 58415 58450 58500 58525 58500 58550 58500 58525 58500 58550 58500 58525 58500 58550 58500 58555 58375 58400 58555 58500 58555 58550 58500 58555 58550 58600 58555 58550 58550 58600 58555 58550 58600 58555 58550 58600 58555 58550 58600 58555 58550 58600 58555 58550 58600 58555 58550 58600 58555 58600 58555 58600 58555 58600 58555 58600 58600 58615 58600 58615 58625 58675	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMM EXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE FISCAL/MEMBERSHIP YEAR ADJUSTMENT RECEPTION/FORUM EXPENSE NEW LAWYER OUTREACH SCHOLARSHIPS/DONATIONS/GRANT SECTION COMMITTEE EXPENSE SECTION SPECIAL PROJECTS LAW SCHOOL OUTREACH MINI-CLE EXPENSE SEMINAR EXPENSE - SECTIONS WEBSITE EXPENSES	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \hline \\ 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ \\ 70,080\\ 54,000\\ 8,100\\ 91,830\\ 2,000\\ 29,295\\ 13,550\\ 284,470\\ \hline \\ \\ 44,810\\ 6,320\\ 172,700\\ 2,500\\ 14,420\\ 14,310\\ 53,804\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 5,000\\ 7,500\\ \hline \\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ \hline \\ \\ -\\ 65,000\\ (1,478,500)\\ 2,025\\ 12,000\\ 500\\ 22,700\\ 2,200\\ 5,810\\ 4,000\\ 30,000\\ 70,270\\ 58,500\\ 9,100\\ 89,910\\ 2,000\\ 38,570\\ 14,950\\ 280,433\\ \hline \\ 62,510\\ 5,220\\ 220,200\\ 2,000\\ 8,020\\ 27,510\\ 50,516\\ \hline \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 - 55,000 (293,100) 525 12,000 500 (1,500) (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) - 9,275 1,400 (4,037) - 17,700 (1,100) 47,500 (500) (6,400) 13,200 (3,288)	0% 0% 50% 50% 18% 59% 0% 61% 0% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1% 40% -17% 28% -20% -44% 92% -6%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56500 56500 56500 57320 57450 57460 58125 58150 58175 58200 58225 58300 58305 58315 58325 58300 58355 58325 58326 58350 58375 58400 58415 58450 58500 58555 58500 58555 58500 58555 58500 58555 58500 58555 58500 58555 58500 58555 58500 58555 58500 58555 58500 58555 58500 58555 58600 58555 58600 58625 58600 58625 58675 58680	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSE EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMEXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE FISCAL/MEMBERSHIP YEAR ADJUSTMENT RECEPTION/FORUM EXPENSE NEW LAWYER OUTREACH SCHOLARSHIPS/DONATIONS/GRANT SECTION COMMITTEE EXPENSE SECTION SPECIAL PROJECTS LAW SCHOOL OUTREACH MINI-CLE EXPENSE SEMINAR EXPENSE - SECTIONS WEBSITE EXPENSES ELECTIONS	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \hline \\ 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ \\ \hline \\ 70,080\\ 54,000\\ 8,100\\ 91,830\\ 2,000\\ 29,295\\ 13,550\\ 284,470\\ \hline \\ \\ 44,810\\ 6,320\\ 172,700\\ 2,500\\ 14,420\\ 14,310\\ 53,804\\ 111,633\\ 10,880\\ \hline \\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 5,000\\ 500\\ 7,500\\ \hline \\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ \hline \\ \\ -\\ 65,000\\ (1,478,500)\\ 2,025\\ 12,000\\ 500\\ 22,700\\ 2,200\\ 5,810\\ 4,000\\ 30,000\\ 70,270\\ 58,500\\ 9,100\\ 89,910\\ 2,000\\ 38,570\\ 14,950\\ 280,433\\ \hline \\ 62,510\\ 5,220\\ 220,200\\ 2,000\\ 8,020\\ 27,510\\ 50,516\\ 76,000\\ 10,380\\ \hline \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 - 55,000 (293,100) 525 12,000 500 (1,500) (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) - 9,275 1,400 (4,037) - 17,700 (1,100) 47,500 (500) (6,400) 13,200 (3,288) (35,633)	0% 0% 50% 50% 18% 59% 0% 61% 0% 5% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1% 40% -1% 40% -1% 28% -20% -44% 92% -6% -32% -5%
55610 55615 55620 55970 55980 55981 55911 56100 56150 56225 56230 56500 56500 56550 56900 57320 57450 57460 58125 58150 58175 58200 58225 58300 58225 58300 58305 58315 58325 58326 58350 58375 58400 58415 58450 58500 58525 58500 58550 58500 58525 58500 58550 58500 58525 58500 58550 58500 58555 58375 58400 58555 58500 58555 58550 58500 58555 58550 58600 58555 58550 58550 58600 58555 58550 58600 58555 58550 58600 58555 58550 58600 58555 58550 58600 58555 58550 58600 58555 58550 58600 58555 58600 58555 58600 58555 58600 58555 58600 58600 58615 58600 58615 58625 58675	CPE COMMITTEE WILLS CUSTODIANSHIP MEMBER ENGAGEMENT COUNCIL SMALL TOWN AND RURAL COUNCIL SMALL TOWN & RURAL COUNCIL OUTREACH & ACTIVITIES CLOUD INFRASTRUCTURE COMPUTER HARDWARE COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES SOFTWARE MAINT & LICENSING COMPUTER SUPPLIES THIRD PARTY SERVICES TRANSFER TO INDIRECT EXPENSES TRIAL ADVOCACY EXPENSES REGULATORY SCHOOL LAW SCHOOL OUTREACH ANNUAL OR OTHER MEETING EXPENS ATTENDANCE AT BOG MEETINGS AWARDS BREAKFAST/LUNCH/DINNER MTG EXP CONFERENCE/INSTITUTE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMMITTEE EXPENSES EXECUTIVE COMM EXP - OTHER HONORARIUM LDSHIP/PROF DEVELOP/RETREATS LEGISLATIVE/LOBBYING MEMBERSHIP & RECRUITING EXP NEWSLETTER/PUBLICATION EXPENSE PER MEMBER CHARGE FISCAL/MEMBERSHIP YEAR ADJUSTMENT RECEPTION/FORUM EXPENSE NEW LAWYER OUTREACH SCHOLARSHIPS/DONATIONS/GRANT SECTION COMMITTEE EXPENSE SECTION SPECIAL PROJECTS LAW SCHOOL OUTREACH MINI-CLE EXPENSE SEMINAR EXPENSE - SECTIONS WEBSITE EXPENSES	$\begin{array}{c} 2,000\\ 5,000\\ 1,000\\ 5,000\\ \hline \\ 55,000\\ 82,000\\ 66,200\\ 330,000\\ 50,000\\ 380,000\\ \hline \\ \\ 10,000\\ (1,185,400)\\ 1,500\\ \hline \\ \\ 24,200\\ 1,550\\ 8,260\\ 6,000\\ \hline \\ \\ \\ 70,080\\ 54,000\\ 8,100\\ 91,830\\ 2,000\\ 29,295\\ 13,550\\ 284,470\\ \hline \\ \\ 44,810\\ 6,320\\ 172,700\\ 2,500\\ 14,420\\ 14,310\\ 53,804\\ 111,633\\ \end{array}$	$\begin{array}{c} 1,000\\ 2,000\\ 5,000\\ 5,000\\ 500\\ 7,500\\ \hline \\ 65,000\\ 130,000\\ 66,200\\ 530,000\\ 50,000\\ 400,000\\ \hline \\ \\ - \\ 65,000\\ (1,478,500)\\ 2,025\\ 12,000\\ 500\\ 22,700\\ 2,200\\ 5,810\\ 4,000\\ 30,000\\ 70,270\\ 58,500\\ 9,100\\ 89,910\\ 2,000\\ 58,500\\ 9,100\\ 89,910\\ 2,000\\ 38,570\\ 14,950\\ 280,433\\ \hline \\ 62,510\\ 5,220\\ 220,200\\ 2,000\\ 8,020\\ 27,510\\ 50,516\\ 76,000\\ \hline \end{array}$	2,500 10,000 48,000 - 200,000 - 20,000 - 55,000 (293,100) 525 12,000 500 (1,500) (2,450) (2,000) 30,000 190 4,500 1,000 (1,920) - 9,275 1,400 (4,037) - 17,700 (1,100) 47,500 (500) (6,400) 13,200 (3,288) (35,633)	0% 0% 50% 50% 18% 59% 0% 61% 0% 55% 550% 25% 35% -6% 42% -30% -33% 0% 8% 12% -2% 0% 32% 10% -1% 40% -1% 40% -1% 28% -20% -44% 92% -6% -32%

(2,528) 4,752 6,082 1,978 106,891 250 43,229 7,026 - 9,448 - 10,295 6,110 47,470 1,973 (68,911) 250 - 1,000 418,710 887	$\begin{array}{c} - \\ 4,756 \\ 74 \\ 169 \\ 22,216 \\ - \\ 3,295 \\ 3,649 \\ 9,311 \\ 983 \\ - \\ 447 \\ 1,865 \\ 19,555 \\ - \\ (23,574) \\ 87 \\ 2,750 \\ 1,042 \\ (166,480) \\ - \end{array}$
12,500 2 -	3,000 130
278 - 124,381 84,042 - 2,029 2,584	- 992 48,048 84,568 - 703
797 39,996 874 - 49,600	13,332 18 16,800
- 1,157 - 386 - 125 - 55	- - 286 - -
29,282 43,143 64,018 268,912 30,498 338,290	13,494 27,330 234,025 21,699 114,689
38,658 141,736) 1,254 - 15,141	47,289 (543,928) - 5,102 - 1,585
667 82 (135) 21,744 50,027	19,167 16,053 579
53,779 11,394 7,388 275,378 - 21,592 120 80,096 -	48,251 949 1,856 232,046 91,793 5,439 - 26,912
7,629 18,894 28,989 4,822 - 3,676	258 1,724 7,185 2,855

(1,1

Total Direct Expenses	4,670,791	5,109,934	439,143	9%	3,817,336	1,057,624

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Indirect 51110 51120 51121 51122	SALARIES BUDGETED TEMPORARY EMPLOYEES UNANTICIPATED TEMPS STAFF REPLACEMENT TEMPS	13,743,352 296,112	14,691,362 261,668	948,009 (34,444)	7% -12%	13,290,031 302,485 813 208,046	4,663,761 105,237 21,264 66,780
51126 51130	EMPLOYEE PLACEMENT FEES VACATION & COMP TIME ACCRUALS					900 19,858	24,773 73,862
51199	SALARY EXPENSE	-	-	-	00/	-	-
51210 51220	EMPLOYEE ASSISTANCE PLAN EMPLOYEE SERVICE AWARDS	4,800 1,680	4,800 2,610	(0) 930	0% 55%	4,800 1,480	1,200 870
51230	FICA (EMPLOYER PORTION)	1,027,685	1,112,598	84,913	8%	1,003,129	350,395
51240	L&I INSURANCE	73,611	72,487	(1,124)	-2%	59,309	14,945
51245	WA STATE FAMILY MEDICAL LEAVE (ER POR	29,686	33,236	3,550	12%	28,506	10,399
51250	MEDICAL (EMPLOYER PORTION)	1,944,108	2,057,482	113,375	6%	1,880,001	667,625
51270 51280	RETIREMENT (EMPLOYER PORTION) TRANSPORTATION ALLOWANCE	1,292,648 34,000	1,322,122 34,000	29,473 0	2% 0%	1,242,168 28,799	420,425 22,905
51280	UNEMPLOYMENT INSURANCE	82,748	71,847	(10,901)	-13%	67,559	16,369
51299	BENEFITS EXPENSE	02,710	-	-	1070	-	-
51310	WORKPLACE BENEFITS	52,710	56,400	3,690	7%	58,052	5,585
51340	HUMAN RESOURCES POOLED EXP	77,112	111,300	34,188	44%	68,911	23,574
51405	MEETING SUPPORT EXPENSES	7,500	9,950	2,450	33%	7,592	2,674
51409	RENT EXPENSE	-	0/0 000	(702, 225)	450/	1,302,980	299,298
51410 51411	RENT MOVE/DOWNSIZING EXPENSES	1,753,325	960,000 28,208	(793, 325)	-45% -71%	415,523 36,887	11,831
51411	RENT - CONFERENCE CENTER	98,400	20,200	(70,192)	-/1/0	(33,800)	21,604 (8,300)
51415	PERSONAL PROP TAXES-WSBA	6,650	8,400	1,750	26%	6,195	1,623
51430	FURNITURE, MAINT, LH IMP	73,832	75,617	1,785	2%	32,987	36,999
51440	OFFICE SUPPLIES & EQUIP	22,564	22,164	(400)	-2%	16,455	6,327
51450	FURN, LH IMP, & OFFICE EQUIP DEPREC	111,192	159,628	48,436	44%	115,775	37,824
51470	COMPUTER HARDWARE DEPREC	49,926	42,000	(7,926)	-16%	39,315	12,493
51480	COMPUTER SOFTWARE DEPREC	71,787	49,339	(22,448)	-31%	69,220	17,655
51500 51501	INSURANCE WORK HOME FURNITURE & EQUIP	272,643 14,000	288,200 14,000	15,557 (0)	6% 0%	265,583 3,996	86,840 1,030
51505	PROFESSIONAL FEES-AUDIT	35,000	41,000	6,000	17%	38,400	36,577
51510	PROFESSIONAL FEES- LEGAL	200,000	200,000	(0)	0%	101,591	38,482
51512	ONLINE LEGAL RESEARCH	24,359	86,000	61,641	253%	26,439	33,117
51513	ACCOMODATIONS FUND	6,500	6,500	0	0%	-	-
51514	TRANSLATION SERVICES	12,000	12,000	(0)	0%	6,814	2,259
51515	TELEPHONE & INTERNET	33,000	33,600	600	2%	32,390	10,820
51520 51525	POSTAGE - GENERAL RECORDS STORAGE	18,300 68,531	15,500 28,849	(2,800) (39,682)	-15% -58%	8,796 62,062	2,168 13,675
51525	BANK FEES (INDIRECT)	50,000	30,000	(20,000)	-40%	23,638	13,666
51620	PRODUCTION MAINT & SUPPLIES	12,500	13,000	500	4%	8,976	4,325
51710	COMPUTER POOLED EXPENSES	1,185,400	1,478,500	293,100	25%	1,141,736	543,928
51810	GAIN (LOSS) ON ASSETS					10,667	-
51925	ALLOWANCE FOR OPEN POSITIONS	(200,000)	(200,000)	-	0%	-	-
51955	CAPITAL LABOR & OVERHEAD	(210,000)	(75,000)	135,000	-64%	(75,555)	(34,442)
51900	OTHER INDIRECT EXPENSE	-	-	-	2600/	-	-
51935	INSURANCE REBATE	(4,060)	(19,016)	(14,956)	368%	(20,950)	-
	TOTAL INDIRECT EXPENSES:	22,373,601	23,140,350	766,749	3%	21,908,556	7,682,444
	TOTAL ALL EXPENSES:	27,044,392	28,250,284	1,205,892	4%	25,725,892	8,740,068
	NET INCOME (LOSS):	(1,163,162)	(1,833,444)	(670,282)	58%	843,370	854,730

					Washington Sta Budget Com		ion	
INDIRECT EXPENSES Cost Center All	FY25 REFORECAST FT FY24 REFORECAST FT		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
INDIRECT	51110 51120 51121 51122 51126 51130	SALARIES BUDGETED TEMPORARY EMPLOYEES UNANTICIPATED TEMPS STAFF REPLACEMENT TEMPS EMPLOYEE PLACEMENT FEES VACATION & COMP TIME ACCRUALS	13,743,352 296,112	14,691,362 261,668	948,009 (34,444)	7% -12%	13,290,031 302,485 813 208,046 900 19,858	4,663,761 105,237 21,264 66,780 24,773 73,862
	51925 51935 51955	ALLOWANCE FOR OPEN POSITIONS INSURANCE REBATE CAPITAL LABOR & OVERHEAD	(200,000) (4,060) (210,000)	(200,000) (19,016) (75,000)	(14,956) 135,000	0% 368% -64%	(20,950) (75,555)	- (34,442)
	51199	SALARY EXPENSE	13,625,404	14,659,014	1,033,609	8%	13,725,627	4,921,236
	51210	EMPLOYEE ASSISTANCE PLAN	4,800	4,800	(0)	0%	4,800	1,200
	51220	EMPLOYEE SERVICE AWARDS	1,680	2,610	930	55%	1,480	870
	51230 51240	FICA (EMPLOYER PORTION) L&I INSURANCE	1,027,685 73,611	1,112,598 72,487	84,913 (1,124)	8% -2%	1,003,129 59,309	350,395 14,945
	51245	WA STATE FAMILY MEDICAL LEAVE (ER PORTION)	29,686	33,236	3,550	12%	28,506	10,399
	51250	MEDICAL (EMPLOYER PORTION)	1,944,108	2,057,482	113,375	6%	1,880,001	667,625
	51270	RETIREMENT (EMPLOYER PORTION)	1,292,648	1,322,122	29,473	2%	1,242,168	420,425
	51280	TRANSPORTATION ALLOWANCE	34,000	34,000	0	0%	28,799	22,905
	51290	UNEMPLOYMENT INSURANCE	82,748	71,847	(10,901)	-13%	67,559	16,369
	51299	BENEFITS EXPENSE	4,490,966	4,711,182	220,216	5%	4,315,751	1,505,132
	51310 51340	WORKPLACE BENEFITS HUMAN RESOURCES POOLED EXP	52,710 77,112	56,400 111,300	3,690 34,188	7% 44%	58,052 68,911	5,585 23,574
	51405	MEETING SUPPORT EXPENSES	7,500	9,950	2,450	33%	7,592	2,674
	51409	RENT EXPENSE	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	_,		1,302,980	299,298
	51410	RENT	1,753,325	960,000	(793,325)	-45%	415,523	11,831
	51411	MOVE/DOWNSIZING EXPENSES	98,400	28,208	(70,192)	-71%	36,887	21,604
	51413	RENT - CONFERENCE CENTER		0.400	1.750	2(0)	(33,800)	(8,300)
	51420 51430	PERSONAL PROP TAXES-WSBA FURNITURE, MAINT, LH IMP	6,650 73,832	8,400 75,617	1,750 1,785	26% 2%	6,195 32,987	1,623
	51440	OFFICE SUPPLIES & EQUIP	22,564	22,164	(400)	-2%	16,455	36,999 6,327
	51450	FURN & OFFICE EQUIP DEPREC	-	159,628	159,628	270	-	-
	51470	COMPUTER HARDWARE DEPREC	49,926	42,000	(7,926)	-16%	39,315	12,493
	51480	COMPUTER SOFTWARE DEPREC	71,787	49,339	(22,448)	-31%	69,220	17,655
	51500 51501	INSURANCE WORK HOME FURNITURE & EQUIP	272,643 14,000	288,200 14,000	15,557	6% 0%	265,583 3,996	86,840 1,030
	51505	PROFESSIONAL FEES-AUDIT	35,000	41,000	(0) 6,000	17%	38,400	36,577
	51510	PROFESSIONAL FEES- LEGAL	200,000	200,000	(0)	0%	101,591	38,482
	51512	ONLINE LEGAL RESEARCH	24,359	86,000	61,641	253%	26,439	33,117
	51513	ACCOMODATIONS FUND	6,500	6,500	0	0%	-	-
	51514 51515	TRANSLATION SERVICES	12,000	12,000	(0) 600	0% 2%	6,814	2,259
	51515 51520	TELEPHONE & INTERNET POSTAGE - GENERAL	33,000 18,300	33,600 15,500	600 (2,800)	-15%	32,390 8,796	10,820 2,168
	51525	RECORDS STORAGE	68,531	28,849	(39,682)	-58%	62,062	13,675
	51530	BANK FEES (INDIRECT)	50,000	30,000	(20,000)	-40%	23,638	13,666
	51620	PRODUCTION MAINT & SUPPLIES	12,500	13,000	500	4%	8,976	4,325
	51710	COMPUTER POOLED EXPENSES	1,185,400	1,478,500	293,100	25%	1,141,736	543,928
	<u>51810</u>	GAIN (LOSS) ON ASSETS	-	-	-	00/	10,667	-
	51900	OTHER INDIRECT EXPENSE	4,146,039	3,770,155	(375,884)	-9%	3,751,404	1,218,252
		TOTAL INDIRECT EXPENSES:	22,262,409	23,140,350	877,941	4%	21,792,781	7,644,620

Washington State Bar Association

Budget Comparison

ACCESS TO JUSTICE

Cost Center	FY25 REFORECAST FTE	1.63
ATJ	FY24 REFORECAST FTE	1.64

FY2024 Reforecast

FY2025

Reforecast

FY24 vs. FY25 % Change Comparison

REVENUE:	TOTAL REVENUE		-	-	-	
DIRECT EXPENSES:						
	50100	STAFF TRAVEL/PARKING	2,800	2,800	-	0%
	50110	STAFF CONFERENCE & TRAINING	3,300	2,495	(805)	-24%
	52121	ATJ BOARD RETREAT	4,000	6,000	2,000	50%
	52125	LEADERSHIP TRAINING	4,000	6,000	2,000	50%
	52140	ATJ BOARD EXPENSE	65,000	58,500	(6,500)	-10%
	52874	PUBLIC DEFENSE	4,000	4,000	-	0%
	58225	CONFERENCE/INSTITUTE EXPENSE	-	30,000	30,000	
	58450	RECEPTION/FORUM EXPENSE	11,000	30,000	19,000	173%
	TOTAL DIRECT EXPEN	NGEG	94,100	139,795	45 605	400/
	IUIAL DIRECT EAPER	NSES	94,100	139,795	45,695	49%
INDIRECT EXPENSE		1563	94,100	137,775	45,095	49%
INDIRECT EXPENSE	s:			· · ·		
INDIRECT EXPENSE	S: 51199	SALARY EXPENSE BENEFITS EXPENSE	145,500	155,733	10,233	7%
INDIRECT EXPENSE	s:	SALARY EXPENSE		· · ·		
INDIRECT EXPENSE	S: 51199 51299	SALARY EXPENSE BENEFITS EXPENSE OTHER INDIRECT EXPENSE	145,500 52,903	155,733 51,565	10,233 (1,338)	7% -3%
INDIRECT EXPENSE	S: 51199 51299 51900	SALARY EXPENSE BENEFITS EXPENSE OTHER INDIRECT EXPENSE	145,500 52,903 48,317	155,733 51,565 42,302	10,233 (1,338) (6,015)	7% -3% -12%
INDIRECT EXPENSE	S: 51199 51299 51900	SALARY EXPENSE BENEFITS EXPENSE OTHER INDIRECT EXPENSE PENSES:	145,500 52,903 48,317	155,733 51,565 42,302	10,233 (1,338) (6,015)	7% -3% -12%
INDIRECT EXPENSE	S: 51199 51299 51900 TOTAL INDIRECT EXP	SALARY EXPENSE BENEFITS EXPENSE OTHER INDIRECT EXPENSE PENSES:	145,500 52,903 48,317 246,721	155,733 51,565 42,302 249,600	10,233 (1,338) (6,015) 2,880	7% -3% -12% 1%

FY2024 Actuals YTD	FY2025 Actuals YTD
1,588 912 2,718 4,150 41,683 2,213 (135) 9,497	259 1,530 2,371 1,425 20,936 2,279 19,167 5,317
62,625	53,285
138,676 48,134 43,699	52,714 16,805 14,319
	83,839
293,135	137,123
(293,135)	(137,123)
9,497 62,625 138,676 48,134 43,699 230,509 293,135	5,317 53,285 52,714 16,805 14,319 83,839 137,123

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					Washington St Budget Compa			
ADMISSIONS Cost Center	FY25 REFORECAST FTE	6.17	FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
ADMISS	FY24 REFORECAST FTE	6.75						
REVENUE:								
	40705	EXAM SOFTWARE REVENUE	27,500	27,500	-	0%	30,615	-
	42207	BAR EXAM FEES	1,160,000	1,280,780	120,780	10%	1,176,215	513,465
	42230	BAR EXAM LATE FEES	55,000	98,200	43,200	79%	56,700	27,000
	42232	HOUSE COUNSEL APPLICATION FEES	45,000	56,260	11,260	25%	33,080	15,350
	42270	RULE 9/LEGAL INTERN FEES	12,000	12,500	500	4%	16,950	1,900
	42285	FOREIGN LAW CONSULTANT FEES	1,240	1,940	700	56%	3,100	970
	42287	SPECIAL ADMISSIONS	-	3,000	3,000		6,435	3,590
	TOTAL REVENUE		1,300,740	1,480,180	179,440	14%	1,323,095	562,275
DIRECT EXPENSES:								
	50050	EQUIPMENT, HARDWARE & SOFTWARE	1,000	-	(1,000)		-	-
	50060	POSTAGE	1,000	2,000	1,000	100%	1,993	1,468
	50100	STAFF TRAVEL/PARKING	20,000	24,000	4,000	20%	20,487	18
	50110	STAFF CONFERENCE & TRAINING	13,500	10,100	(3,400)		6,348	4,302
	50120	STAFF MEMBERSHIP DUES	400	495	95	24%	555	245
	50140	SUPPLIES	1,500	4,000	2,500	167%	1,824	2,720
	52210	FACILITY, PARKING, FOOD	94,000	100,000	6,000	6%	125,601	-
	52215	EXAMINER FEES	34,000	44,500	10,500	31%	31,500	9,000
	52221	UBE EXAMINATIONS	113,000	118,000	5,000	4%	134,108	-
	52225	BOARD OF BAR EXAMINERS	39,000	42,500	3,500	9%	22,040	-
	52230	BAR EXAM PROCTORS	21,000	23,000	2,000	10%	13,737	-
	52240	DISABILITY ACCOMMODATIONS	55,967	65,000	9,033	16%	73,578	1,975
	52245	CHARACTER & FITNESS INVESTI	1,000	1,000	-	0%	(59)	700
	52250	LAW SCHOOL VISITS	1,700	2,000	300	18%	1,379	-
	53282	SOFTWARE HOSTING	41,140	45,609	4,469	11%	43,806	14,752
	52270	DEPRECIATION-SOFTWARE	11,038	-	(11,038)	-100%	10,697	-
	TOTAL DIRECT EXPENSES		449,245	482,204	32,959	7%	487,593	35,180
INDIRECT EXPENSES		SALARY EXPENSE	500 057	521 757	0.700	20/	541 001	196 900
	51199	BENEFITS EXPENSE	522,057	531,757	9,700	2%	541,081	186,892
	51299		171,676	187,665	15,989	9%	170,209	62,580
	51900	OTHER INDIRECT EXPENSE	198,867	163,842	(35,025)		180,597	56,649
	TOTAL INDIRECT EXPENSES	S:	892,601	883,264	(9,337)	-1%	891,887	306,121
	TOTAL ALL EXPENSES:		1,341,846	1,365,468	23,622	2%	1,379,480	341,301
	NET INCOME (LOSS):		(41,106)	114,712	155,818	-379%	(56,385)	220,974

			Washington State Bar Association Budget Comparison							
ADVANCEMENT Cost Center ADV FTE	FTE FY25 REFORECAST FY24 REFORECAST		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD		
REVENUE:										
	TOTAL REVENUE		-	-	-		-	-		
DIRECT EXPENSES:										
	50110	STAFF CONFERENCE & TRAINING	8,424	3,300	(5,124)	-61%	8,846	120		
	TOTAL DIRECT EXP	ENSES	8,424	3,300	(5,124)	-61%	8,846	120		
INDIRECT EXPENSES										
	51199	SALARY EXPENSE	244,054	264,525	20,471	8%	246,488	86,418		
	51299	BENEFITS EXPENSE	69,638	74,703	5,065	7%	68,782	23,809		
	<u>51900</u>	OTHER INDIRECT EXPENSE	55,683	50,098	(5,584)	-10%	50,660	16,706		
	TOTAL INDIRECT E	XPENSES:	369,375	389,327	19,952	5%	365,930	126,932		
	TOTAL ALL EXPENS	SES:	377,799	392,627	14,828	4%	374,776	127,052		
	NET INCOME (LOSS):	(377,799)	(392,627)	(14,828)	4%	(374,776)	(127,052)		

			Washington State Bar Association Budget Comparison					
BAR NEWS Cost Center BN	FY25 REFORECAST		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40900	ROYALTIES	2,500	2,000	(500)	-20%	1,543	-
	42710	BNEWS DISPLAY ADVERTISING	400,000	405,000	5,000	1%	418,264	140,525
	42720	BNEWS SUBSCRIPT/SINGLE ISSUES	100	100	-	0%	108	72
	42730	BNEWS CLASSIFIED ADVERTISING	7,500	2,500	(5,000)	-67%	2,761	1,463
	42760	JOB TARGET ADVERSTISING	200,000	180,000	(20,000)	-10%	152,139	27,663
	TOTAL REVENUE		610,100	589,600	(20,500)	-3%	574,814	169,723
DIRECT EXPENSES:	50060	POSTAGE	110,000	135,000	25,000	23%	122,543	45,194
	50000	PRINTING & COPYING	250,000	262,500	12,500	2370 5%	211,369	43,194 71,689
	50070	STAFF CONFERENCE & TRAINING	2,500	202,500	(2,500)	-100%	211,309	/1,089
	50120	STAFF MEMBERSHIP DUES	135	150	(2,500)	11%	135	-
	50120	SUBSCRIPTIONS	225	225	-	0%	203	204
	50155	DIGITAL/ONLINE DEVELOPMENT	2,000	2,000	-	0%	572	-
	52710	GRAPHICS/ARTWORK	100	1,000	900	900%	1,103	-
	52750	EDITORIAL ADVIS COMMITTEE EXP	-	300	300		20	-
	TOTAL DIRECT EXP	ENSES	364,960	401,175	36,215	10%	335,944	117,088
INDIRECT EXPENSE								
	51199	SALARY EXPENSE	213,007	207,867	(5,140)	-2%	213,708	74,137
	51299	BENEFITS EXPENSE	69,472	67,753	(1,718)	-2%	70,936	21,462
	51900	OTHER INDIRECT EXPENSE	65,700	54,444	(11,256)	-17%	59,554	18,087
	TOTAL INDIRECT EX	XPENSES:	348,179	330,063	(18,115)	-5%	344,199	113,686
	TOTAL ALL EVENIO	YEQ.	710 100	731 330	10 100	20/	(00.142	220 774
	TOTAL ALL EXPENS	DEO:	713,139	731,238	18,100	3%	680,143	230,774
	NET INCOME (LOSS)):	(103,039)	(141,638)	(38,600)	37%	(105,328)	(61,051)

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			Washington State Bar Association Budget Comparison					
BOARD OF GOVE Cost Center BOG	RNORS FY25 REFORECAST F FY24 REFORECAST F		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
DUG	F124 REFURECASI F	1E 1.50						
REVENUE:								
	TOTAL REVENUE		-	-	-	-	-	-
DIRECT EXPENSES:								
DIRECT EAFENSES:	50100	STAFF TRAVEL/PARKING	_	-	-		(0)	-
	50140	SUPPLIES	500	500	-	0%	610	73
	52125	LEADERSHIP TRAINING	20,000	15,000	(5,000)	-25%	1,681	-
	52810	BOG MEETINGS	190,000	148,000	(42,000)	-22%	164,195	25,436
	52820	BOG COMMITTEES' EXPENSES	2,500	2,000	(500)	-20%	18	3,628
	52821	BOG RETREAT	35,000	40,000	5,000	14%	30,180	37,745
	52822	BOG CONFERENCE ATTENDANCE	60,000	39,500	(20,500)	-34%	55,335	2,583
	52830	BOG TRAVEL & OUTREACH	22,000	50,000	28,000	127%	28,413	6,723
	52880	BOG ELECTIONS	26,900	42,000	15,100	56%	12,545	-
	52960	PRESIDENT'S DINNER	15,000	10,000	(5,000)	-33%	11,129	0
	52812	NEW GOVERNOR ORIENTATION	10,000	10,000	-	0%	2,570	-
	52823	PRESIDENTS PHOTO	3,300	3,300	-	0%	1,652	-
	52891	LONG RANGE STRATEGIC PLANNING COUNCIL	600	-	(600)	-100%	-	-
	<u>58150</u>	ATTENDANCE AT BOG MEETINGS	-	-	-		(0)	-
	TOTAL DIRECT EXPE	INSES	385,800	360,300	(25,500)	-7%	308,326	76,189
INDIRECT EXPENSES:		SALARY EXPENSE	104 220	112.026	0.51(00/	102 200	40 (29
	51199 51200	BENEFITS EXPENSE	104,320	112,836	8,516	8% 60/	103,300	40,628
	51299 51900	OTHER INDIRECT EXPENSE	38,166 44,193	40,463	2,297	6% -19%	30,140	13,856
			/	35,785	(8,408)		40,219	12,603
	TOTAL INDIRECT EX	renses:	186,679	189,084	2,405	1%	173,659	67,086
	TOTAL ALL EXPENSE	ES:	572,479	549,384	(23,095)	-4%	481,985	143,275
	NET INCOME (LOSS):		(572,479)	(549,384)	23,095	-4%	(481,985)	(143,275)
	$\frac{11}{11} \frac{11}{11} \frac{1000}{100} \frac{1000}{1$		(314,419)	(347,304)	23,095	-4 70	(401,703)	(143,273)

Washington State Bar Association Budget Comparison

CHARACTER & FITNESS BOARD

Cost Center	FY25 REFORECAST FTE 0.75
CFB	FY24 REFORECAST FTE 0.75

FY2024 FY2025 Reforecast

Reforecast

FY24 vs. FY25 % Change Comparison

REVENUE:						
	TOTAL REVE	NUE	-	-	-	
DIRECT EXPENSES:						
	52235	CHARACTER & FITNESS BOARD EXP	18,000	18,000	-	0%
	54310	COURT REPORTERS	15,000	15,000	-	0%
	TOTAL DIREC	CT EXPENSES	33,000	33,000	-	0%
INDIRECT EXPENSES:						
	51199	SALARY EXPENSE	93,739	95,315	1,576	2%
	51299	BENEFITS EXPENSE	30,383	27,582	(2,801)	-9%
	51900	OTHER INDIRECT EXPENSE	22,096	19,170	(2,926)	-13%
	TOTAL INDIR	ECT EXPENSES:	146,219	142,068	(4,152)	-3%
	TOTAL ALL E	XPENSES:	179,219	175,068	(4,152)	-2%
	NET INCOME	(LOSS):	(179,219)	(175,068)	4,152	-2%

FY2024 Actuals YTD	FY2025 Actuals YTD
-	-
2,064	3,022
687	3,096
2,750	6,118
95,864 28,077	32,070 8,957
<u>20,109</u> 144,050	<u>6,406</u> 47,433
144,030	-7,435
146,800	53,551
(146,800)	(53,551)

Washington State Bar Association Budget Comparison

Cost Center	ON STRATEGIES FY25 REFORECAST		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change
COMM	FY24 REFORECAST	FTF5.20				
REVENUE:						
REVENUE:	42570	50 YEAR MEMBER TRIBUTE LUNCH	500	100	(400)	-80%
	44100	WSBA LOGO MERCHANDISE SALES	500	500	500	-0070
	TOTAL REVENUE	WSDA LOOO MERCHANDISE SAELS	500	600	100	20%
DIRECT EXPENSES:			500	000	100	2070
DIRECT EATENSES.	50050	EQUIPMENT, HARDWARE & SOFTWARE	2,500	_	(2,500)	-100%
	50100	STAFF TRAVEL/PARKING	5,895	5,895	(2,500)	0%
	50110	STAFF CONFERENCE & TRAINING	7,500	11,100	3,600	48%
	50120	STAFF MEMBERSHIP DUES	1,120	1,800	680	61%
	50130	SUBSCRIPTIONS	4,000	4,000	-	0%
	52511	BAR LEADERS SUMMIT	-	35,000	35,000	
	52570	APEX	50,000	52,500	2,500	5%
	52573	50 YEAR MEMBER TRIBUTE LUNCH	30,000	35,000	5,000	17%
	52878	COMMUNICATIONS OUTREACH	15,000	15,000	-	0%
	54027	BAR OUTREACH	18,000	20,000	2,000	11%
	TOTAL DIRECT EXP	ENSES	134,015	180,295	46,280	35%
INDIRECT EXPENSE	S:					
	51199	SALARY EXPENSE	398,702	465,232	66,531	17%
	51299	BENEFITS EXPENSE	136,595	170,889	34,294	25%
	51900	OTHER INDIRECT EXPENSE	153,201	154,640	1,439	1%
	TOTAL INDIRECT EX	XPENSES:	688,499	790,762	102,263	15%
	TOTAL ALL EXPENS	JES:	822,514	971,057	148,543	18%
			/	/	,	
	NET INCOME (LOSS)	:	(822,014)	(970,457)	(148,443)	18%

FY2024 Actuals YTD	FY2025 Actuals YTD
1,900	-
<u>2,414</u> 4,314	-
$ \begin{array}{r} 1\\ 3,213\\ 9,199\\ 1,164\\ 2,237\\ -\\ 47,315\\ 25,600\\ 3,956\\ 6,082 \end{array} $	- 715 8,721 - 435 - - 1,456 74
98,767	11,401
344,958 118,866 139,218	112,942 46,683 50,160
603,042	209,785
701,809	221,186
(697,495)	(221,186)

			Washington State Bar Association Budget Comparison						
COMMUNICATION Cost Center COMM FTE	STRATEGIES FY25 REFOREC FY24 REFOREC	CAST FTE 1.00	FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD	
REVENUE:	TOTAL REVEN	UE		<u> </u>	<u> </u>				
DIRECT EXPENSES:									
	TOTAL DIREC	ΓEXPENSES	-	-	-		-	-	
INDIRECT EXPENSES:									
	51199	SALARY EXPENSE	171,146	179,737	8,591	5%	171,493	60,843	
	51299	BENEFITS EXPENSE	47,372	45,265	(2,107)	-4%	47,337	14,981	
	51900	OTHER INDIRECT EXPENSE	29,462	25,560	(3,901)	-13%	26,684	8,541	
	TOTAL INDIRE	CCT EXPENSES:	247,980	250,562	2,582	1%	245,513	84,365	
	NET INCOME (LOSS):	(247,980)	(250,562)	(2,582)	1%	(245,513)	(84,365)	

			Washington State Bar Association Budget Comparison					
DISCIPLINE Cost Center DISC	FY25 REFORECAST I FY24 REFORECAST I		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	42450 44350 44450	AUDIT REVENUE RECOVERY OF DISCIPLINE COSTS DISCIPLINE HISTORY SUMMARY	1,000 100,000 18,000	1,000 70,000 19,000	(30,000) 1,000	0% -30% 6%	170 54,568 18,510	43 27,297 6,840
	TOTAL REVENUE		119,000	90,000	(29,000)	-24%	73,248	34,180
DIRECT EXPENSES:		DEBRECHTION	,	,		1000/	,	, , , , , , , , , , , , , , , , , , , ,
	50015 50080	DEPRECIATION PUBLICATIONS PRODUCTION	11,539 300	- 350	(11,539) 50	-100% 17%	- 129	-
	50100	STAFF TRAVEL/PARKING	15,000	25,000	10,000	67%	13,800	3,680
	50110	STAFF CONFERENCE & TRAINING	34,627	37,345	2,718	8%	28,498	4,471
	50120	STAFF MEMBERSHIP DUES	7,365	7,090	(275)	-4%	6,418	6,308
	50160	TELEPHONE	4,800	4,000	(800)	-17%	2,740	726
	54310	COURT REPORTERS	60,000	60,000	-	0%	61,666	15,770
	54320	OUTSIDE COUNSEL EXPENSES	1,000	1,000	-	0%	250	-
	54360	LITIGATION EXPENSES	40,000	40,000	-	0%	43,226	3,159
	54370	DISABILITY EXPENSES	9,000	15,000	6,000	67%	7,026	3,649
	54400	TRANSLATION SERVICES	1,000	12,000	11,000	1100%	9,448	983
	TOTAL DIRECT EXP	ENSES	184,630	201,785	17,155	9%	173,200	38,744
INDIRECT EXPENSES:	#1100						2 52 4 222	1.001.551
	51199	SALARY EXPENSE	3,795,327	4,053,832	258,505	7%	3,734,909	1,336,576
	51299	BENEFITS EXPENSE	1,130,160	1,272,455	142,295	13%	1,115,581	408,840
	51900	OTHER INDIRECT EXPENSE	1,119,549	995,577	(123,972)	-11%	1,015,908	332,106
	TOTAL INDIRECT EX	XPENSES:	6,045,036	6,321,864	276,827	5%	5,866,398	2,077,522
	TOTAL ALL EXPENS	ES:	6,229,667	6,523,649	293,982	5%	6,039,598	2,116,266
	NET INCOME (LOSS)	:	(6,110,667)	(6,433,649)	(322,982)	5%	(5,966,350)	(2,082,087)

Washington State Bar Association Budget Comparison

DIVERSITY

Cost Center	FY25 REFORECAST FT12.69
DIV	FY24 REFORECAST FT12.69

FY2024 FY2025 Reforecast Reforecast

FY24 vs. FY25 % Change Comparison

	40300	DONATIONS & GRANTS	135,000	135,000	-	0%
	TOTAL REVENU	Ε	135,000	135,000	-	0%
DIRECT EXPENSES:						
	50033	CONSULTING SERVICES	60,550	7,000	(53,550)	-88%
	50100	STAFF TRAVEL/PARKING	1,500	3,700		147%
	50110	STAFF CONFERENCE & TRAINING	2,000	3,000		50%
	50120	STAFF MEMBERSHIP DUES	550	700		27%
	50145	SURVEYS	17,500	-		-100%
	52680	DEI COUNCIL	3,800	5,900		55%
	52681	DIVERSITY EVENTS & PROJECTS	31,800	43,100		36%
	<u>52687</u>	INTERNAL DIVERSITY OUTREACH	-	7,500	7,500	
	TOTAL DIRECT	TOTAL REVENUE 135,000 135,000 - 50033 CONSULTING SERVICES 60,550 7,000 (53,550) 50100 STAFF TRAVEL/PARKING 1,500 3,700 2,200 50110 STAFF CONFERENCE & TRAINING 2,000 3,000 1,000 50120 STAFF MEMBERSHIP DUES 550 700 150 50145 SURVEYS 17,500 - (17,500) 502680 DEI COUNCIL 3,800 5,900 2,100 52681 DIVERSITY EVENTS & PROJECTS 31,800 43,100 11,300 52687 INTERNAL DIVERSITY OUTREACH - 7,500 7,500 FOTAL DIRECT EXPENSES 117,700 70,900 (46,800) 51199 SALARY EXPENSE 212,559 227,749 15,190 51299 BENEFITS EXPENSE 70,525 79,569 9,043	-40%			
INDIRECT EXPENSES:						
INDIRECT EXPENSES:	51199	SALARY EXPENSE	212,559	227,749	15,190	7%
INDIRECT EXPENSES:	51199 51299					7% 13%
INDIRECT EXPENSES:		BENEFITS EXPENSE	70,525	79,569	9,043	
INDIRECT EXPENSES:	51299 51900	BENEFITS EXPENSE OTHER INDIRECT EXPENSE	70,525 79,252	79,569 68,757	9,043 (10,495)	13%
INDIRECT EXPENSES:	51299 51900	BENEFITS EXPENSE OTHER INDIRECT EXPENSE	70,525 79,252	79,569 68,757	9,043 (10,495)	13% -13%
INDIRECT EXPENSES:	51299 <u>51900</u> TOTAL INDIREC	BENEFITS EXPENSE OTHER INDIRECT EXPENSE CT EXPENSES:	70,525 79,252 362,337	79,569 68,757 376,075	9,043 (10,495) 13,738	13% -13%
INDIRECT EXPENSES:	51299 51900 TOTAL INDIREC	BENEFITS EXPENSE OTHER INDIRECT EXPENSE CT EXPENSES: PENSES:	70,525 79,252 362,337 480,037	79,569 68,757 376,075 446,975	9,043 (10,495) 13,738 (33,062)	13% -13% 4%

FY2024 Actuals YTD	FY2025 Actuals YTD
135,000	-
135,000	-
58,775 874 2,154 90 17,500 3,948 11,016	45 211 162 90 - 79 3,670 -
94,356	4,257
149,846 46,796 71,929	74,317 25,162 22,861
268,572	122,340
2(2.029	12(500
362,928	126,598
(227,928)	(126,598)

			Washington State Bar Association Budget Comparison					
FINANCE Cost Center FIN	FY25 REFORECAST FTF 6.92 FY24 REFORECAST FTF 6.92		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	650,000	600,000	(50,000)	-8%	929,443	218,483
	TOTAL REVENUE		650,000	600,000	(50,000)	-8%	929,443	218,483
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	1,500	3,750	2,250	150%	3,765	1,402
	50110	STAFF CONFERENCE & TRAINING	520	500	(20)	-4%	263	303
	50120	STAFF MEMBERSHIP DUES	620	670	50	8%	613	-
	TOTAL DIRECT EXP	PENSES	2,640	4,920	2,280	86%	4,641	1,706
INDIRECT EXPENSES:	51199	SALARY EXPENSE	714,291	751,265	36,974	5%	703,552	262,460
	51299	BENEFITS EXPENSE	232,902	232,396	(506)	0%	221,122	76,713
	51900	OTHER INDIRECT EXPENSE	203,876	176,878	(26,998)	-13%	200,758	58,910
	<u>51936</u>	FACILITY RESERVE REBATE		-	0.480	10/	15,520	-
	TOTAL INDIRECT E	APENSES:	1,151,069	1,160,539	9,470	1%	1,140,952	398,083
	TOTAL ALL EXPENS	SES:	1,153,709	1,165,459	11,750	1%	1,145,593	399,789
	NET INCOME (LOSS):	(503,709)	(565,459)	(61,750)	12%	(216,150)	(181,306)

Washington State Bar Association

			Budget Comparison					
FOUNDATION Cost Center FOUND	FY25 REFORECAST F FY24 REFORECAST F		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:	TOTAL REVENUE							
DIRECT EXPENSES:	IUIAL NEVENUE		-	-	-		-	-
Diffect End Eriges.	50033	CONSULTING SERVICES	3,000	3,200	200	7%	3,000	3,200
	50050	EQUIPMENT, HARDWARE & SOFTWARE	-	2,400	2,400		2,175	878
	50060	POSTAGE	350	400	50	14%	38	-
	50070	PRINTING & COPYING	700	1,000	300	43%	452	-
	50100	STAFF TRAVEL/PARKING	900	3,000	2,100	233%	269	-
	50110	STAFF CONFERENCE & TRAINING	2,300	2,200	(100)	-4%	1,473	-
	50140	SUPPLIES	150	2,000	1,850	1233%	81	-
	<u>52940</u>	BOARD OF TRUSTEES	3,250	3,600	350	11%	1,245	62
	TOTAL DIRECT EXP	ENSES	10,650	17,800	7,150	67%	8,733	4,140
INDIRECT EXPENSES:			100.026	106.460	6 42 4	(0)	100 100	25 (05
	51199	SALARY EXPENSE BENEFITS EXPENSE	100,026	106,460	6,434	6%	100,198	35,695
	51299	OTHER INDIRECT EXPENSE	38,468 30,935	34,056 26,838	(4,412) (4,097)	-11% -13%	37,670	10,962
	51900 TOTAL INDIRECT EX		<u> </u>	167,354		<u>-13%</u>	<u>28,230</u> 166,098	8,918
	I UTAL INDIKEUT EA	M ENGLO.	107,420	107,354	(2,074)	-1 70	100,098	55,575
	TOTAL ALL EXPENS	ES:	180,078	185,154	5,076	3%	174,831	59,715
			/	/	,		/	ź
	NET INCOME (LOSS)	•	(180,078)	(185,154)	(5,076)	3%	(174,831)	(59,715)

Washington State Bar Association Budget Comparison

HUMAN RESOURCES

Cost Center	FY25 REFORECAST FTI4.00
HR	FY24 REFORECAST FTI4.00

FY2024 Reforecast

FY2025 Reforecast **FY24 vs. FY25** % Change Comparison

REVENUE:	TOTAL REVE					
DIRECT EXPENSES:	IUIAL REVE	NUE				
	50033	CONSULTING SERVICES	2,000	10,000	8,000	400%
	50100	STAFF TRAVEL/PARKING	700	300	(400)	-57%
	50110	STAFF CONFERENCE & TRAINING	-	2,200	2,200	
	50120	STAFF MEMBERSHIP DUES	1,000	1,000	-	0%
	50130	SUBSCRIPTIONS	1,000	2,000	1,000	100%
	54512	STAFF TRAINING- GENERAL	12,912	36,800	23,888	185%
	54520	RECRUITING AND ADVERTISING	8,000	8,000	-	0%
	54530	PAYROLL PROCESSING	50,000	50,000	-	0%
	54540	SALARY SURVEYS	1,500	1,000	(500)	-33%
	<u>54590</u>	TRANSFER TO INDIRECT EXPENSE	(77,112)	(111,300)	(34,188)	44%
	TOTAL DIREC	T EXPENSES	-	-	-	
INDIRECT EXPENSES:						
	51199	SALARY EXPENSE	608,465	585,774	(22,691)	-4%
	51299	BENEFITS EXPENSE	98,842	115,845	17,003	17%
	51925	ALLOWANCE FOR OPEN POSITIONS	(200,000)	(200,000)	-	0%
	<u>51900</u>	OTHER INDIRECT EXPENSE	117,847	102,241	(15,606)	-13%
	TOTAL INDIR	ECT EXPENSES:	625,154	603,860	(21,294)	-3%
	TOTAL ALL E	XPENSES:	625,154	603,860	(21,294)	-3%
	NET INCOME	(LOSS):	(625,154)	(603,860)	21,294	-3%

FY2024 Actuals YTD	FY2025 Actuals YTD
-	-
- 122 - 1,036 1,904 10,295 6,110 47,470 1,973 (68,911)	15 171 528 993 447 1,865 19,555 - (23,574)
537,380 146,941 - 107,121	196,579 46,784 - 34,040
791,442	277,402
· · - · · · -	,
791,442	277,402
1719772	211,402
(791,442)	(277,402)

			Washington State Bar Association Budget Comparison					
LAW CLERK PRO Cost Center CLERK			FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:	42275 42286	LAW CLERK FEES LAW CLERK APPLICATION FEES	204,000 3,200	234,000 3,200	30,000	15% 0%	201,068 5,000	194,500 2,000
	TOTAL REVENUE		207,200	237,200	30,000	14%	206,068	196,500
DIRECT EXPENSES:	50015	DEPRECIATION	4,675	12,000	7,325	157%	-	-
	50100	STAFF TRAVEL/PARKING	500	-	(500)	-100%	24	-
	50130	SUBSCRIPTIONS	250	250	-	0% 0%	276	-
	52245 53282	CHARACTER & FITNESS INVESTI SOFTWARE HOSTING	100 1,210	100 681	- (529)	-44%	- 1,288	- 222
	52255 52258	LAW CLERK BOARD LAW CLERK OUTREACH	8,000 5,000	8,000 30,000	- 25,000	-44 /8 0% 500%	5,716 5,476	1,440
	TOTAL DIRECT EXP		19,735	51,031	31,296	159%	12,781	1,662
INDIRECT EXPENSES			17,700	51,001	01,270	10770	12,701	1,002
	51199 51299 51900	SALARY EXPENSE BENEFITS EXPENSE OTHER INDIRECT EXPENSE	100,677 31,257 36,238	113,225 38,208 31,439	12,549 6,952 (4,799)	12% 22% -13%	102,505 30,283 32,871	37,406 11,824 10,425
	TOTAL INDIRECT EX	KPENSES:	168,171	182,873	14,702	9%	165,659	59,656
	TOTAL ALL EXPENS	ES:	187,907	233,904	45,997	24%	178,440	61,318
	NET INCOME (LOSS)		19,293	3,296	(15,997)	-83%	27,628	135,182

			Washington State Bar Association Budget Comparison					
LEGISLATIVE Cost Center LEG	FY25 REFORECAST F FY24 REFORECAST F		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:						00/		
	50100	STAFF TRAVEL/PARKING	2,500	2,500	-	0%	83	243
	50110	STAFF CONFERENCE & TRAINING	2,500	2,200	(300)	-12% -56%	1,736	2,101
	50120 50130	STAFF MEMBERSHIP DUES SUBSCRIPTIONS	450 2,000	200	(250)	-30%	260 1,985	-
	50150 50160	TELEPHONE	485	2,000 575	- 90	19%	577	1,986 192
	52660	JUD RECOMMEND COMMITTEE	2,250	2,250	-	0%	577	192
	54910	RENT - OLYMPIA OFFICE	1,500	2,250	(1,500)	-100%	_	_
	54920	CONTRACT LOBBYIST	12,500	15,000	2,500	20%	12,500	3,000
	54940	LEGISLATIVE COMMITTEE	1,250	1,250	-	0%	2	130
	54970	BOG LEGISLATIVE COMMITTEE	300	300	-	0%	-	-
	TOTAL DIRECT EXP		25,735	26,275	540	2%	17,142	7,652
INDIRECT EXPENSES								
	51199	SALARY EXPENSE	152,783	160,438	7,654	5%	152,110	53,924
	51299	BENEFITS EXPENSE	52,771	53,043	272	1%	51,366	17,078
	<u>51900</u>	OTHER INDIRECT EXPENSE	50,085	43,453	(6,632)	-13%	45,633	14,445
	TOTAL INDIRECT EX	KPENSES:	255,640	256,933	1,294	1%	249,109	85,447
	TOTAL ALL EXPENS	ES:	281,375	283,208	1,834	1%	266,251	93,099
	NET INCOME (LOSS)	:	(281,375)	(283,208)	(1,834)	1%	(266,251)	(93,099)

			Washington State Bar Association Budget Comparison					
LEGAL LUNCHBOX Cost Center FY25 REFORECAST FT10.43 LLB FY24 REFORECAST FT10.43		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD	
REVENUE:	41450 <u>43400</u>	SPONSORSHIPS DIGITAL VIDEO SALES	9,000 20,000	9,000 25,000	5,000	0% 25%	9,000 27,097	20,286
	TOTAL REVENUE		29,000	34,000	5,000	17%	36,097	20,286
DIRECT EXPENSES:								
	52240	DISABILITY ACCOMMODATIONS	2,000	2,000	-	0%	-	-
	53700	SPEAKERS & PROGRAM DEVELOP	100	100	-	0%	-	-
	53730	HONORARIUM	1,500	1,500	-	0%	-	-
	53283	ON24 OVERAGE CHARGE	4,500	4,500	-	0%	6,067	-
	53731	INSURANCE REBATE	(425)	(3,375)	(2,950)	694%	(2,528)	-
	TOTAL DIRECT EXH	PENSES	7,675	4,725	(2,950)	-38%	3,539	-
INDIRECT EXPENSES								
	51199	SALARY EXPENSE	28,998	31,087	2,089	7%	29,074	10,383
	51299	BENEFITS EXPENSE	10,648	11,797	1,149	11%	10,072	3,786
	51900	OTHER INDIRECT EXPENSE	12,669	10,991	(1,678)	-13%	11,215	3,643
	<u>51935</u>	INSURANCE REBATE	(4,060)	(19,016)	(14,956)	368%	(20,950)	-
	TOTAL INDIRECT E	XPENSES:	48,255	34,859	(13,396)	-28%	29,411	17,811
	TOTAL ALL EXPENS	SES:	55,930	39,584	(16,346)	-29%	32,950	17,811
	NET INCOME (LOSS):	(26,930)	(5,584)	21,346	-79%	3,147	2,475

			Washington State Bar Association Budget Comparison					
LICENSING & MEMBERSHIP RECORDS Cost Center FY25 REFORECAST FT14.83 LICMR FY24 REFORECAST FT13.83		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD	
REVENUE:								
	41100	STATUS CERTIFICATE FEES	27,000	27,000	-	0%	29,600	11,125
	42288	INVESTIGATION FEES	20,000	25,000	5,000	25%	27,700	11,300
	42290	PRO HAC VICE	400,000	425,000	25,000	6%	496,975	135,623
	45040	MEMBER CONTACT INFORMATION	3,700	5,000	1,300	35%	5,706	2,973
	<u>45060</u>	PHOTO BAR CARD SALES	200	200	-	0%	276	204
	TOTAL REVENUE		450,900	482,200	31,300	7%	560,257	161,225
DIRECT EXPENSES:				6.000	(000		6.000	
	50033	CONSULTING SERVICES	-	6,000	6,000	770/	6,000	-
	50060	POSTAGE	17,652	4,000	(13,652)	-77%	14,599	89
	50140 53282	SUPPLIES SOFTWARE HOSTING	15,125	- 18,380	3,255	22%	- 16,105	- 5,940
	55282 <u>55010</u>	LICENSING FORMS	13,123	10,500	5,255	22/0	10,105	5,940
	TOTAL DIRECT EXP		32,777	28,380	(4,397)	-13%	36,704	6,029
INDIRECT EXPENSES:		LIGES	02,111	20,000	(1,0)1)	10 / 0	50,704	0,027
INDIRECT EATENSES.	51199	SALARY EXPENSE	401,688	515,705	114,016	28%	421,349	169,620
	51299	BENEFITS EXPENSE	137,867	158,553	20,686	15%	138,247	50,700
	51900	OTHER INDIRECT EXPENSE	112,839	123,457	10,618	9%	102,480	41,074
	TOTAL INDIRECT E	XPENSES:	652,394	797,715	145,320	22%	662,076	261,393
	TOTAL ALL EXPENS	SES:	685,171	826,095	140,923	21%	698,780	267,422
	NET INCOME (LOSS):	(234,271)	(343,895)	(109,623)	47%	(138,523)	(106,197)

			Washington State Bar Association Budget Comparison					
LICENSE FEES Cost Center LIC			FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40600	LICENSE FEES	16,692,574	16,853,241	160,667	1%	16,279,888	5,180,944
	40625	LICENSE FEES - NEW ADMITTEES	417,925	429,375	11,450	3%	423,252	158,071
	40650	LICENSE FEES - LATE FEES	200,000	200,000	-	0%	383,255	412
	40675	LICENSE FEES - REINSTATEMENTS	10,000	10,000	-	0%	27,605	4,743
	TOTAL REVENUE		17,320,499	17,492,616	172,117	1%	17,113,999	5,344,170
	NET IN	COME (LOSS):	17,320,499	17,492,616	172,117	1%	17,113,999	5,344,170

			Washington State Bar Association Budget Comparison					
LIMITED LICENSE Cost Center LLLT	LEGAL TECH FY25 REFOREC FY24 REFOREC		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:	41800	SEMINAR REGISTRATIONS	2,000	7,000	5,000	250%	1,045	5,600
	42281 42288	LLLT LICENSE FEES INVESTIGATION FEES	18,562	17,731	(831)	-4%	15,296 100	5,004
	42291 45220	LLLT LATE LICENSE FEES MCLE LATE FEES	- 150	- 300	- 150	100%	404 450	-
	TOTAL REVENU		20,712	25,031	4,319	21%	17,295	10,604
DIRECT EXPENSES:	52683 52689	LLLT BOARD LLLT EDUCATION	14,240	11,500 1,000	(2,740) 1,000	-19%	1,341	368 35
	TOTAL DIRECT	EXPENSES	14,240	12,500	(1,740)	-12%	1,341	403
INDIRECT EXPENSES:	51199 51299 51900	SALARY EXPENSE BENEFITS EXPENSE OTHER INDIRECT EXPENSE	51,460 14,055 15,615	55,689 17,525 14,569	4,229 3,470 (1,045)	8% 25% -7%	51,982 13,665 14,309	20,181 6,233 5,652
	TOTAL INDIRE	CT EXPENSES:	81,130	87,784	6,654	8%	79,955	32,066
	TOTAL ALL EX	PENSES:	95,370	100,284	4,914	5%	81,297	32,469
	NET INCOME (I	LOSS):	(74,658)	(75,253)	(595)	1%	(64,002)	(21,865)

			Washington State Bar Association Budget Comparison						
LIMITED PRACTIC Cost Center LPO	CE OFFICERS FY25 REFORECAS FY24 REFORECAS		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD	
REVENUE:									
KEVENUE:	42288 45110 45115 45120 45125 45220	INVESTIGATION FEES LPO EXAMINATION FEES LPO EXAM LATE FEES LPO LICENSE FEES LPO LATE LICENSE FEES MCLE LATE FEES	$\begin{array}{r} 200\\ 22,000\\ 3,300\\ 170,000\\ 2,500\\ 4,000\end{array}$	$300 \\ 20,000 \\ 3,000 \\ 160,000 \\ 2,000 \\ 4,000$	$ \begin{array}{r} 100\\(2,000)\\(300)\\(10,000)\\(500)\end{array} $	50% -9% -9% -6% -20% 0%	1,500 18,600 2,300 156,974 3,600 3,150	300 7,200 1,200 50,492 - 1,650	
	TOTAL REVENUE		202,000	189,300	(12,700)	-6%	186,124	60,842	
DIRECT EXPENSES:	50050	EQUIPMENT, HARDWARE & SOFTWARE	1,000	- 200	(1,000)	-100% 0%	1,240	-	
	50070 50140 52210	PRINTING & COPYING SUPPLIES FACILITY, PARKING, FOOD	200 100 6,300	200 200 9,500	100 3,200	100% 51%	123 113 7,333	-	
	52688 55130 55165	EXAM WRITING LPO BOARD EXPENSES LPO OUTREACH	9,000 4,000 1,000	19,000 4,000 1,000	10,000 -	111% 0% 0%	8,400 278	4,200	
	53282	SOFTWARE HOSTING	3,025	3,404	379	13%	3,221	- 1,101	
	TOTAL DIRECT E	XPENSES	24,625	37,304	12,679	51%	20,708	5,301	
INDIRECT EXPENSES:	51199 51299	SALARY EXPENSE BENEFITS EXPENSE	69,420 19,678	66,043 21,528	(3,378) 1,849	-5% 9%	70,170 18,906	21,424 6,474	
	51900	OTHER INDIRECT EXPENSE	22,980	17,637	(5,344)	-23%	20,883	5,904	
	TOTAL INDIRECT	Γ EXPENSES:	112,079	105,207	(6,872)	-6%	109,959	33,801	
	TOTAL ALL EXPE	ENSES:	136,704	142,511	5,807	4%	130,667	39,102	
	NET INCOME (LO	PSS):	65,296	46,789	(18,507)	-28%	55,457	21,740	

			Budget Comparison					
MANDATORY CON Cost Center MCLE	NTINUING LEGA FY25 REFORECA FY24 REFORECA	ST FTE 4.76	FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
REVERUE.	45210	ACTIVITY APPLICATION FEE	550,000	600,000	50,000	9%	724,600	236,600
	45215	ACTIVITY APPLICATION LATE FEE	220,000	220,000	-	0%	266,650	101,200
	45220	MCLE LATE FEES	190,000	225,000	35,000	18%	266,925	66,600
	45230	ANNUAL ACCREDITED SPONSOR FEES	36,000	39,000	3,000	8%	37,500	24,000
	45250	ATTENDANCE LATE FEES	90,000	120,000	30,000	33%	120,050	44,450
	45255	COMITY CERTIFICATES - REQUEST	13,800	13,800	-	0%	13,497	8,100
	45260	COMITY CERTIFICATES - SUBMIT	14,000	16,000	2,000	14%	16,575	15,925
	TOTAL REVENU	E	1,113,800	1,233,800	120,000	11%	1,445,797	496,875
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	50	50	-	0%	-	-
	50110	STAFF CONFERENCE & TRAINING	4,000	4,600	600	15%	3,564	-
	50120	STAFF MEMBERSHIP DUES	500	500	-	0%	500	500
	55210	MCLE BOARD EXPENSES	5,000	4,000	(1,000)	-20%	-	992
	55220	DEPRECIATION-SOFTWARE	130,449	142,183	11,734	9%	124,381	48,048
	TOTAL DIRECT I	EXPENSES	139,999	151,333	11,334	8%	128,445	49,540
INDIRECT EXPENSES:			454 500	400.001	(54.100)	100/	445 511	1.47.004
	51199	SALARY EXPENSE	454,500	400,391	(54,109)	-12%	445,511	147,004
	51299	BENEFITS EXPENSE	155,895	136,403	(19,492)	-13%	143,462	44,748
	51900	OTHER INDIRECT EXPENSE	173,235	121,923	(51,312)	-30%	157,394	40,697
	TOTAL INDIREC	I EAPENSES:	783,630	658,717	(124,913)	-16%	746,368	232,449
	TOTAL ALL EXP	ENSES:	923,629	810,050	(113,579)	-12%	874,813	281,989
	NET INCOME (LC	DSS):	190,171	423,750	233,579	123%	570,984	214,886

MEMBER WELLN			FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals	FY2025 Actuals
Cost Center MWP	FY25 REFORECAST FY24 REFORECAST						YTD	YTD
REVENUE:								
	40205	DIVERSION	7,500	10,000	2,500	33%	11,050	1,500
	TOTAL REVENUE		7,500	10,000	2,500	33%	11,050	1,500
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	400	1,000	600	150%	-	-
	50110	STAFF CONFERENCE & TRAINING	312	4,400	4,088	1310%	527	75
	50120	STAFF MEMBERSHIP DUES	700	800	100	14%	267	375
	50130	SUBSCRIPTIONS	1,200	1,455	255	21%	1,324	441
	54715	MEMBER WELLNESS COUNCIL	1,000	4,250	3,250	325%	1,000	1,042
	TOTAL DIRECT EXH	PENSES	3,612	11,905	8,293	230%	3,117	1,933
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	133,585	144,902	11,316	8%	138,488	48,353
	51299	BENEFITS EXPENSE	59,693	47,310	(12,383)	-21%	59,180	15,085
	51900	OTHER INDIRECT EXPENSE	43,603	37,829	(5,774)	-13%	39,832	12,561
	TOTAL INDIRECT E	EXPENSES:	236,881	230,041	(6,841)	-3%	237,499	76,000
	TOTAL ALL EXPENS	SES:	240,493	241,946	1,452	1%	240,617	77,933
	NET INCOME (LOSS	5):	(232,993)	(231,946)	1,048	0%	(229,567)	(76,433)

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Cost Center	FY25 REFORECAST FTE 2.45
MSE	FY24 REFORECAST FTE 2.45

				Budget Comparison					
MEMBER SERVIC Cost Center MSE	ES & ENGAGEM Fy25 reforecas Fy24 reforecas	T FTE 2.45	FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD	
REVENUE:									
	40900 41450 41800	ROYALTIES SPONSORSHIPS SEMINAR REGISTRATIONS	10,800	10,800 2,500 3,000	2,500 3,000	0%	12,767 2,566 1,980	5,150	
	TOTAL REVENUE	SEMINAR REDISTRATIONS	10,800	<u> </u>	5,500	51%	1,300	- 5,150	
DIRECT EXPENSES:	IUIAL REVENUE		10,000	10,300	5,500	5170	17,313	5,150	
DIRECT EATENSES.	50070	PRINTING & COPYING	1,300	1,600	300	23%	-	-	
	50085	YLL SECTION PROGRAM	1,500	1,300	(200)	-13%	-	555	
	50095	CLE COMPS	1,000	1,000	-	0%	-	-	
	50100	STAFF TRAVEL/PARKING	2,500	3,500	1,000	40%	20	30	
	50110	STAFF CONFERENCE & TRAINING	250	2,200	1,950	780%	339	-	
	50120	STAFF MEMBERSHIP DUES	845	450	(395)	-47%	150	-	
	54391	LAW LIBRARY DESKBOOK ACCESS	-	10,000	10,000	20 /	-	9,31	
	54610	LIBRARY MATERIALS/RESOURCES	4,000	4,000	-		250	8	
	55266	NEW LAWYER OUTREACH EVENTS	1,500	5,000	3,500	233%	2,029	-	
	55270	NEW LAWYERS COMMITTEE	13,500	15,000	1,500	11%	2,584	70	
	55970	MEMBER ENGAGEMENT COUNCIL	1,000	500	(500)	-50%	-	-	
	55981	SMALL TOWN AND RURAL COUNCIL OUTREACH AND ACTIVITIES	55,000	65,000	10,000	18%	29,282	-	
	55980	SMALL TOWN AND RURAL COUNCIL	5,000	7,500	2,500	50%	55	-	
	57460	LAW SCHOOL OUTREACH	-	500	500		-	-	
	58450	RECEPTION/FORUM EXPENSE	1,000	1,000	-	0%	149	10	
	58500	NEW LAWYER OUTREACH	1,000	-	(1,000)	-100%	-	-	
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	-	(5,000)	-100%	_	-	
	TOTAL DIRECT EX	XPENSES	94,395	118,900	24,505	26%	34,857	10,792	
INDIRECT EXPENSES:	F1100		1 (7 000			00/	150.007	10.55	
	51199	SALARY EXPENSE	167,808	167,441	(367)	0%	159,996	43,574	
	51299	BENEFITS EXPENSE	57,800	65,553	7,753	13%	53,060	18,919	
	<u>51900</u>	OTHER INDIRECT EXPENSE	72,181	62,623	(9,559)	-13%	65,742	20,85	
	TOTAL INDIRECT	EXPENSES:	297,790	295,617	(2,173)	-1%	278,797	83,344	
	TOTAL ALL EXPE	NSES:	392,185	414,517	22,332	6%	313,654	94,130	
	NET INCOME (LOS	SS).	(381,385)	(398,217)	(16,832)	4%	(296,341)	(88,980	
		•[00]•	(201,203)	(0)0,217)	(10,052)	U/ T	(270,011)	100,001	

			Washington State Bar Association Budget Comparison					
MINI CLE Cost Center MINI	FY25 REFORECAST		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	TOTAL DIRECT EXP	ENSES	-	-	-		-	-
INDIRECT EXPENSES:			(() - 7	71.240	1 400	70/		
	51199	SALARY EXPENSE	66,852	71,340	4,488	7%	67,856	23,862
	51299	BENEFITS EXPENSE	22,372	26,074	3,701	17%	21,787	8,366
	<u>51900</u>	OTHER INDIRECT EXPENSE	27,105	23,516	(3,589)	-13%	24,750	7,788
	TOTAL INDIRECT E	XPENSES:	116,330	120,930	4,600	4%	114,393	40,015
	NET INCOME (LOSS)	:	(116,330)	(120,930)	(4,600)	4%	(114,393)	(40,015)

		Washington State Bar Association Budget Comparison					
		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
40950	NME PRODUCT SALES	40,000	150,000	110,000	275%	114,482	92,212
41800	SEMINAR REGISTRATIONS	15,000	13,000			16,455	3,564
	TRIAL ADVOCACY PROGRAM				25%		-
TOTAL REVENUE		67,000	178,000	111,000	166%	143,035	95,776
55265	SPEAKERS & PROGRAM DEVELOPMENT	250	575	325	130%	-	-
57320	TRIAL ADVOCACY EXPENSES	1,500	2,025	525	35%	1,254	-
TOTAL DIRECT EXPENSES		1,750	2,600	850	49%	1,254	-
51199		59,225	63,225	4,001	7%	58,755	21,373
51299				1,370	6%		7,554
<u>51900</u>	OTHER INDIRECT EXPENSE	24,748	21,471	(3,277)	-13%	22,430	7,160
TOTAL INDIRECT EX	XPENSES:	106,078	108,171	2,093	2%	101,764	36,087
						100.077	
TOTAL ALL EXPENS	ES:	107,828	110,771	2,943	3%	103,019	36,087
NET INCOME (LOSS)	:	(40,828)	67,229	108,057	-265%	40,017	59,689
	FY25 REFORECAST I FY24 REFORECAST I 40950 41800 47100 TOTAL REVENUE 55265 57320 TOTAL DIRECT EXP 51199 51299 51900 TOTAL INDIRECT EXP	FY25 REFORECAST FTF0.84 40950 NME PRODUCT SALES 41800 SEMINAR REGISTRATIONS 47100 TRIAL ADVOCACY PROGRAM TOTAL REVENUE 55265 5265 SPEAKERS & PROGRAM DEVELOPMENT 57320 TRIAL ADVOCACY EXPENSES TOTAL DIRECT EXPENSES 51199 51199 SALARY EXPENSE 51299 BENEFITS EXPENSE	ReforecastFY25 REFORECAST FTF0.84Reforecast40950NME PRODUCT SALES40,00041800SEMINAR REGISTRATIONS15,00047100TRIAL ADVOCACY PROGRAM12,000TOTAL REVENUE67,00055265SPEAKERS & PROGRAM DEVELOPMENT25057320TRIAL ADVOCACY EXPENSES1,500TOTAL DIRECT EXPENSES1,75051199SALARY EXPENSE22,10551900OTHER INDIRECT EXPENSES24,748TOTAL INDIRECT EXPENSES:106,078TOTAL ALL EXPENSES:107,828	FY2024 FY25 REFORECAST FTF0.84 FY24 REFORECAST FTF0.84 FY2025 Reforecast FY2025 Reforecast 40950 NME PRODUCT SALES 40,000 150,000 41800 SEMINAR REGISTRATIONS 15,000 13,000 47100 TRIAL ADVOCACY PROGRAM 12,000 150,000 TOTAL REVENUE 67,000 178,000 55265 SPEAKERS & PROGRAM DEVELOPMENT 250 575 57320 TRIAL ADVOCACY EXPENSES 1,500 2,025 TOTAL DIRECT EXPENSES 1,750 2,600 51199 SALARY EXPENSE 59,225 63,225 51290 BENEFITS EXPENSE 22,105 23,475 51900 OTHER INDIRECT EXPENSES: 106,078 108,171 TOTAL ALL EXPENSES: 107,828 110,771	UCATION FY25 REFORECAST FTH 0.84 FY24 REFORECAST FTH 0.84 FY2024 FY2025 FY2025 Reforecast FY2025 Reforecast FY24 vs. FY25 Comparison 40950 NME PRODUCT SALES 40,000 150,000 110,000 41800 SEMINAR REGISTRATIONS 15,000 13,000 (2,000) 47100 TRIAL ADVOCACY PROGRAM 12,000 150,000 110,000 55265 SPEAKERS & PROGRAM DEVELOPMENT 250 575 325 57320 TRIAL ADVOCACY EXPENSES 1,500 2,025 525 TOTAL DIRECT EXPENSES 1,500 2,025 525 525 51199 SALARY EXPENSE 59,225 63,225 4,001 51299 BENEFITS EXPENSE 22,105 23,475 1,370 51900 OTHER INDIRECT EXPENSES 24,748 21,471 (3,277) TOTAL ALL EXPENSES: 106,078 108,171 2,093	Budget Comparison FY20 CATION FY2024 FY2025 FY24 vs. FY25 % Change 40950 NME PRODUCT SALES 40,000 150,000 110,000 275% 41800 SEMINAR REGISTRATIONS 15,000 13,000 (2,000) -13% 47100 TRIAL ADVOCACY PROGRAM 12,000 15,000 3,000 25% TOTAL REVENUE 67,000 178,000 111,000 166% 55265 SPEAKERS & PROGRAM DEVELOPMENT 250 575 325 130% 57320 TRIAL ADVOCACY EXPENSES 1,500 2,025 525 35% TOTAL DIRECT EXPENSES 1,500 2,025 525 35% TOTAL DIRECT EXPENSES 1,750 2,600 850 49% 51199 SALARY EXPENSE 59,225 63,225 4,001 7% 51299 BENEFITS EXPENSE 22,105 23,475 1,370 6% 51900 OTHER INDIRECT EXPENSES: 106,078 108,171 2,093 2%	UCATION FY25 REFORECAST FTI 0.84 FY24 REFORECAST FTI 0.84 FY2024 Reforecast FY2025 Reforecast FY2025 Reforecast FY24 vs. FY25 Comparison % Change Actuals YTD 40950 NME PRODUCT SALES 40,000 150,000 110,000 275% 114,482 41800 SEMINAR REGISTRATIONS 15,000 13,000 (2,000) -13% 16,455 47100 TRIAL ADVOCACY PROGRAM 12,000 15,000 111,000 166% 143,035 55265 SPEAKERS & PROGRAM DEVELOPMENT 250 575 325 130% - 57320 TRIAL ADVOCACY EXPENSES 1,500 2,025 525 35% 1,254 51199 SALARY EXPENSE 59,225 63,225 4,001 7% 58,755 51209 BENEFTS EXPENSE 22,105 23,475 1,370 6% 0,580 51900 OTHER INDIRECT EXPENSES: 106,078 108,171 2,093 2% 101,764 TOTAL LIL EXPENSES: 106,078 108,171 2,043 3% 103,019

	Washington	State Bar	Association	
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			Washington State Bar Association Budget Comparison					
OFFICE OF GENE Cost Center OGC	RAL COUNSEL FY25 REFORECAST F FY24 REFORECAST F		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40200	COPY FEES	-	-	-		427	-
	40210	RECORDS REQUEST FEES	-	-	-		315	270
	TOTAL REVENUE		-	-	-		742	270
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	-	3,500	3,500		-	-
	50110	STAFF CONFERENCE & TRAINING	6,656	6,215	(441)	-7%	3,094	-
	50120	STAFF MEMBERSHIP DUES	2,868	2,090	(778)	-27%	1,075	1,625
	50135	TRANSCRIPTION SERVICES	2,100	-	(2,100)	-100%	-	-
	52240	DISABILITY ACCOMMODATIONS	6,000	6,000	-	0%	532	-
	54360	LITIGATION EXPENSES	200	1,000	800	400%	3	136
	55419	COURT RULES COMMITTEE	1,000	1,000	-	0%	-	-
	55615	WILLS	2,000	2,000	-		-	-
	55620	CUSTODIANSHIP	5,000	5,000	-	0%	125	-
	TOTAL DIRECT EXP	ENSES	25,824	26,805	981	4%	4,829	1,761
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	682,914	682,130	(784)	0%	700,467	227,027
	51299	BENEFITS EXPENSE	221,400	210,435	(10,965)	-5%	180,093	65,683
	51900	OTHER INDIRECT EXPENSE	178,833	158,347	(20,487)	-11%	162,422	50,369
	TOTAL INDIRECT EX	PENSES:	1,083,147	1,050,911	(32,235)	-3%	1,042,982	343,078
	TOTAL ALL EXPENS	ES:	1,108,971	1,077,716	(31,254)	-3%	1,047,812	344,839
	NET INCOME (LOSS):		(1,108,971)	(1,077,716)	31,254	-3%	(1,047,070)	(344,569)

OF

Cost Center	FY25 REFORECAST FTE 3.90
OED	FY24 REFORECAST FTE 2.90

OFFICE OF THE E Cost Center OED	EXECUTIVE DIRECTOR FY25 REFORECAST FTE 3.90 FY24 REFORECAST FTE 2.90		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	4,450	2,000	(2,450)	-55%	2,485	715
	50110	STAFF CONFERENCE & TRAINING	9,282	8,800	(482)	-5%	9,179	1,505
	50120	STAFF MEMBERSHIP DUES	1,890	2,175	285	15%	1,240	645
	50145	SURVEYS	-	-	-		-	-
	52125	LEADERSHIP TRAINING	15,000	20,000	5,000	33%	16,016	-
	52585	WASHINGTON LEADERSHIP INSTITUTE	80,000	100,000	20,000	25%	80,000	100,000
	52590	BAR LEADERS CONFERENCE	-	-	-	500/	-	-
	52840	ED TRAVEL & OUTREACH	4,000	6,000	2,000	50%	5,601	406
	TOTAL DIRECT E	XPENSES	114,622	138,975	24,353	21%	114,521	103,271
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	491,121	602,222	111,100	23%	490,689	198,382
	51299	BENEFITS EXPENSE	126,289	153,250	26,961	21%	134,228	52,201
	51900	OTHER INDIRECT EXPENSE	85,439	99,685	14,246	17%	77,730	33,830
	TOTAL INDIRECT	EXPENSES:	702,850	855,157	152,307	22%	702,647	284,414
	TOTAL ALL EXPE	ENSES:	817,472	994,132	176,660	22%	817,168	387,685
	NET INCOME (LO	SS):	(817,472)	(994,132)	(176,660)	22%	(817,168)	(387,685)

					Budget Compari	ison		
OFFICE OF GENER Cost Center OGCDB	RAL COUNSEL - DI FY25 REFORECAST F FY24 REFORECAST F		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50110	STAFF CONFERENCE & TRAINING	-	2,000	2,000		-	-
	50120	STAFF MEMBERSHIP DUES	100	100	-	0%	-	-
	54310	COURT REPORTERS	500	25,000	24,500	4900%	44,538	3,350
	55310	DISCIPLINARY BOARD EXPENSES	4,000	5,000	1,000	25%	797	-
	55320	CHIEF HEARING OFFICER	40,000	40,000	-	0%	39,996	13,332
	55330	HEARING OFFICER EXPENSES	4,000	4,000	-	0%	874	18
	55340	HEARING OFFICER TRAINING	400	1,000	600	150%	-	-
	55370	APPOINTED COUNSEL	48,000	50,400	2,400	5%	49,600	16,800
	55380	DISCIPLINARY SELECTION PANEL	1,000	1,000	-	0%	-	-
	TOTAL DIRECT EXPI	ENSES	98,000	128,500	30,500	31%	135,804	33,500
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	129,192	125,704	(3,487)	-3%	135,940	43,970
	51299	BENEFITS EXPENSE	34,681	41,128	6,446	19%	37,123	13,548
	<u>51900</u>	OTHER INDIRECT EXPENSE	41,247	33,228	(8,018)	-19%	37,512	11,053
	TOTAL INDIRECT EX	KPENSES:	205,120	200,060	(5,059)	-2%	210,574	68,572
	TOTAL ALL EXPENS	FS.	303,120	328,560	25,441	8%	346,378	102,072
	TOTAL ALL LAI LINS	EG.	505,120	520,500	20,441	0 /0	570,570	102,072
	NET INCOME (LOSS):		(303,120)	(328,560)	(25,441)	8%	(346,378)	(102,072)

			Washington State Bar Association Budget Comparison						
PRACTICE OF LAV Cost Center PLB			FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD	
REVENUE:									
	TOTAL REVENUE	2	-	-	-		-	_	
DIRECT EXPENSES:									
	50130	SUBSCRIPTIONS	-	-	-	220/	-	-	
	55510	PRACTICE OF LAW BOARD	12,000	16,000	4,000	33%	1,157	-	
	TOTAL DIRECT F	EXPENSES	12,000	16,000	4,000	33%	1,157	-	
INDIRECT EXPENSES:									
	51199	SALARY EXPENSE	47,419	44,050	(3,369)	-7%	48,544	15,937	
	51299	BENEFITS EXPENSE	21,236	15,037	(6,199)	-29%	18,779	5,265	
	<u>51900</u>	OTHER INDIRECT EXPENSE	16,204	11,502	(4,702)	-29%	14,695	4,648	
	TOTAL INDIREC	T EXPENSES:	84,860	70,590	(14,270)	-17%	82,019	25,850	
	TOTAL ALL EXP	ENSES:	96,860	86,590	(10,270)	-11%	83,176	25,850	
	NET INCOME (LC	DSS):	(96,860)	(86,590)	10,270	-11%	(83,176)	(25,850)	

			Washington State Bar Association Budget Comparison					
PRACTICE MANAC Cost Center PMA	GEMENT ASSISTA FY25 REFORECAST FY24 REFORECAST	FTE 0.95	FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:	40900	ROYALTIES	62,000	62,000	_	0%	69,581	16,480
	TOTAL REVENUE		62,000	62,000	-	0%	69,581	16,480
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	350	1,000	650	186%	386	-
	50110	STAFF CONFERENCE & TRAINING	260	2,500	2,240	862%	-	147
	50120	STAFF MEMBERSHIP DUES	150	150	-	0%	150	-
	54645	LEGAL TECH TASK FORCE	-	5,000	5,000		-	2,750
	55250	CASEMAKER/FASTCASE	75,000	85,000	10,000	13%	84,042	84,568
	TOTAL DIRECT EX	PENSES	75,760	93,650	17,890	24%	84,578	87,465
INDIRECT EXPENSES:			,	,	,		,	,
	51199	SALARY EXPENSE	83,329	89,534	6,205	7%	83,474	30,097
	51299	BENEFITS EXPENSE	25,645	29,659	4,014	16%	24,903	9,532
	51900	OTHER INDIRECT EXPENSE	27,989	24,282	(3,706)	-13%	25,523	8,039
	TOTAL INDIRECT	EXPENSES:	136,963	143,475	6,512	5%	133,901	47,668
	TOTAL ALL EXPEN	ISES:	212,723	237,125	24,402	11%	218,479	135,133
	NET INCOME (LOS	S):	(150,723)	(175,125)	(24,402)	16%	(148,897)	(118,653)

			Washington State Bar Association Budget Comparison							
PROFESSIONAL RI Cost Center PRP	ESPONSIBILITY P FY25 REFORECAST FY24 REFORECAST	FT] 1.08	FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD		
REVENUE:										
	TOTAL REVENUE		-	-	-		-	-		
DIRECT EXPENSES:										
	50100	STAFF TRAVEL/PARKING	1,500	4,000	2,500	167%	1,761	424		
	50110	STAFF CONFERENCE & TRAINING	-	2,200	2,200	00/	-	-		
	50120	STAFF MEMBERSHIP DUES CPE COMMITTEE	500 1,000	500 1,000	-	0% 0%	400 386	590 286		
	<u>55610</u>				4 700					
	TOTAL DIRECT EX	PENSES	3,000	7,700	4,700	157%	2,547	1,301		
INDIRECT EXPENSES:					-					
	51199	SALARY EXPENSE BENEFITS EXPENSE	138,408	141,621	3,213	2%	138,684	47,821		
	51299	OTHER INDIRECT EXPENSE	63,587	40,867	(22,720)	-36%	62,414	13,153		
	51900 TOTAL INDIRECT E		32,408	27,605	(4,803)	-15%	29,391	9,169		
	IUIAL INDIKEUI E	ar Endes;	234,403	210,093	(24,309)	-10%	230,489	70,143		
	TOTAL ALL EXPEN	SES:	237,403	217,793	(19,609)	-8%	233,036	71,444		
	NET INCOME (LOSS	5):	(237,403)	(217,793)	19,609	-8%	(233,036)	(71,444)		

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Cost Center	FY25 REFORECAST FTE 1.62
PSP	FY24 REFORECAST FTE 1.62

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					Budget Compari	ison			
PUBLIC SERVICE I Cost Center PSP	PROGRAMS FY25 REFORECAST F FY24 REFORECAST F		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD	
REVENUE:									
	40300	DONATIONS & GRANTS	130,000	135,280	5,280	4%	130,000	-	
	TOTAL REVENUE		130,000	135,280	5,280	4%	130,000	-	
DIRECT EXPENSES:									
	50037	DONATIONS/SPONSORSHIPS/GRANTS	292,309	300,000	7,691	3%	278,889	78,441	
	50100	STAFF TRAVEL/PARKING	500	2,000	1,500	300%	333	54	
	50110 50145	STAFF CONFERENCE & TRAINING SURVEYS	- 100	2,200	2,200 (100)	-100%	-	-	
	52110	PRO BONO & PUBLIC SERVICE COMMITTEE	2,500	2,500	(100)	0%	- 782	-	
	54130	PRO BONO OUTREACH	2,000	4,000	2,000	100%	1,978	169	
	TOTAL DIRECT EXPE		297,409	310,700	13,291	4%	281,983	78,664	
INDIRECT EXPENSES:									
	51199	SALARY EXPENSE	128,379	136,915	8,536	7%	117,051	45,186	
	51299	BENEFITS EXPENSE	43,223	47,862	4,640	11%	37,768	15,238	
	<u>51900</u>	OTHER INDIRECT EXPENSE	47,728	41,408	(6,320)	-13%	43,312	13,817	
	TOTAL INDIRECT EX	PENSES:	219,330	226,185	6,855	3%	198,131	74,241	
	TOTAL ALL EXPENSE	ES:	516,739	536,885	20,146	4%	480,114	152,904	
	NET INCOME (LOSS):		(386,739)	(401,605)	(14,866)	4%	(350,114)	(152,904)	

PUBLICATION & D Cost Center PUB	DESIGN SERVI FY25 REFOREC FY24 REFOREC	CAST FTE 0.89	FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:	TOTAL REVEN	TIF						
DIRECT EXPENSES:								
DIRECT EM ERSES.	50130	SUBSCRIPTIONS	200	200	-	0%	88	80
	54026	IMAGE LIBRARY	4,100	4,800	700	17%	4,752	4,756
	TOTAL DIRECT	Γ EXPENSES	4,300	5,000	700	16%	4,840	4,836
INDIRECT EXPENSES:	51199 51299 51900	SALARY EXPENSE BENEFITS EXPENSE OTHER INDIRECT EXPENSE	72,960 23,139 26,221	76,345 26,506 22,749	3,385 3,367 (3,472)	5% 15% -13%	76,767 21,510 23,976	27,013 8,718 7,536
	TOTAL INDIRE	CT EXPENSES:	122,320	125,600	3,279	3%	122,253	43,268
	TOTAL ALL EX	IPENSES:	126,620	130,600	3,979	3%	127,093	48,104
	NET INCOME (I	LOSS):	(126,620)	(130,600)	(3,979)	3%	(127,093)	(48,104)

		Washington State Bar Association Budget Comparison							
REGULATORY SER Cost Center RSD FTE	RSD FTE FY24 REFORECAST FTE 2.60		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD	
REVENUE:									
	TOTAL REVENUE		-	-	-	-	-	-	
DIRECT EXPENSES:					()				
	50100	STAFF TRAVEL/PARKING	650	600	(50)	-8%	438	126	
	50110	STAFF CONFERENCE & TRAINING	19,500	8,400	(11,100)	-57%	5,913	600	
	<u>50120</u>	STAFF MEMBERSHIP DUES	350	490	140	40%	350	490	
	TOTAL DIRECT EX	PENSES	20,500	9,490	(11,010)	-54%	6,700	1,216	
INDIRECT EXPENSES:									
	51199	SALARY EXPENSE	357,120	299,450	(57,670)	-16%	353,064	100,366	
	51299	BENEFITS EXPENSE	105,529	84,363	(21,166)	-20%	102,161	27,402	
	51900	OTHER INDIRECT EXPENSE	76,601	56,872	(19,729)	-26%	69,609	19,218	
	TOTAL INDIRECT	EXPENSES:	539,250	440,685	(98,565)	-18%	524,834	146,985	
	TOTAL ALL EXPEN	ISES:	559,750	450,175	(109,575)	-20%	531,535	148,202	
	NET INCOME (LOS	S):	(559,750)	(450,175)	109,575	-20%	(531,535)	(148,202)	

			Washington State Bar Association Budget Comparison						
REGULATORY REF Cost Center RR	FORM FY25 REFORECAST FTE FY24 REFORECAST FTE	1.8 0.00	FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD	
REVENUE:									
	TOTAL REVENUE		-	-	-	-	-	-	
DIRECT EXPENSES:	50033 52691	CONSULTING SERVICES OUTREACH EXPENSES	-	72,500 10,000	72,500 10,000		-	2,966	
	TOTAL DIRECT EXPENSES		_	82,500	82,500		_	2,966	
INDIRECT EXPENSES:	51199	SALARY EXPENSE		157,764	157,764			36,829	
	51299	BENEFITS EXPENSE	-	46,175	46,175		-	9,771	
	51900	OTHER INDIRECT EXPENSE	-	32,589	32,589		-	6,406	
	TOTAL INDIRECT EXPENSES	S:	-	236,528	236,528		-	53,006	
	TOTAL ALL EXPENSES:		-	319,028	319,028		-	55,972	
	NET INCOME (LOSS):		-	(319,028)	(319,028)		-	(55,972)	

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Cost Center	FY25 REFORECAST FTF2.53
SECT	FY24 REFORECAST FTF2.58

			budget Comparison								
SECTIONS ADMIN Cost Center SECT	CT FY24 REFORECAST FTF2.58 EVENUE: RECT EXPENSES: FY24 REFORECAST FTF2.58 48010 REIMBURSEMENTS FROM SECTIONS TOTAL REVENUE 50100 STAFF TRAVEL/PARKING		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD			
REVENUE:											
	48010	REIMBURSEMENTS FROM SECTIONS	297,786	275,000	(22,786)	-8%	275,415	323,838			
	TOTAL REVENUE		297,786	275,000	(22,786)	-8%	275,415	323,838			
DIRECT EXPENSES:	50100	STAFE TRAVEL /DARVINC	1,000	1,500	500	50%	59				
	50110	STAFF TRAVEL/FARKING STAFF CONFERENCE & TRAINING	500	1,500	(500)	-100%	-	-			
	50120	STAFF MEMBERSHIP DUES	200	200	-	0%	-	-			
	50130	SUBSCRIPTIONS	350	-	(350)	-100%	331	-			
	52540	SECTION/COMMITTEE CHAIR MTGS	1,000	700	(300)	-30%	80	-			
	TOTAL DIRECT EX	PENSES	3,050	2,400	(650)	-21%	470	-			
INDIRECT EXPENSES:	51199	SALARY EXPENSE	159,053	169,092	10,038	6%	160,918	52,386			
	51299	BENEFITS EXPENSE	65,223	67,073	1,850	3%	67,620	20,839			
	51900	OTHER INDIRECT EXPENSE	76,011	64,668	(11,344)	-15%	69,223	21,730			
	TOTAL INDIRECT	EXPENSES:	300,288	300,832	544	0%	297,761	94,955			
	TOTAL ALL EXPEN	ISES:	303,338	303,232	(106)	0%	298,231	94,955			
	NET INCOME (LOS	S):	(5,552)	(28,232)	(22,680)	409%	(22,816)	228,883			

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			Washington State Bar Association Budget Comparison					
SERVICE CENTER Cost Center SC	FY25 REFORECAST FTE FY24 REFORECAST FTE	5.78 5.78	FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:	TOTAL REVENUE							
DIRECT EXPENSES:	IUIAL KEVENUE						-	-
	50100	STAFF TRAVEL/PARKING	2,376	2,376	-	0%	2,376	715
	50110	STAFF CONFERENCE & TRAINING	2,184	677	(1,507)	-69%	10	-
	54400	TRANSLATION SERVICES	-	-	-		-	-
	TOTAL DIRECT EXPENSES		4,560	3,053	(1,507)	-33%	2,386	715
INDIRECT EXPENSES:	- 1100		204 527	107 105	22 500	00/	102 7 17	1 40 402
	51199 51299	SALARY EXPENSE BENEFITS EXPENSE	394,527 160,136	427,125 160,271	32,598 136	8% 0%	403,747 156,116	140,493
	51299 51900	OTHER INDIRECT EXPENSE	170,289	147,739	(22,550)	-13%	154,687	50,656 49,364
	TOTAL INDIRECT EXPENSES		724,952	735,135	10,183	1%	714,551	240,513
			,	,	10,100			210,010
	TOTAL ALL EXPENSES:		729,512	738,188	8,676	1%	716,937	241,228
	NET INCOME (LOSS):		(729,512)	(738,188)	(8,676)	1%	(716,937)	(241,228)

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Cost Center	FY25 REFORECAST FTE 1
ТЕСН	FY24 REFORECAST FTE 1

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					Budget Comparis	son		
TECHNOLOGY Cost Center TECH	FY25 REFORECAST I FY24 REFORECAST I		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50033	CONSULTING SERVICES	165,000	140,000	(25,000)	-15%	270,160	55,931
	50100	STAFF TRAVEL/PARKING	1,000	1,000	-	0%	786	90
	50110	STAFF CONFERENCE & TRAINING	6,000	6,000	-	0%	823	-
	50120	STAFF MEMBERSHIP DUES	200	300	100	50%	120	-
	50160	TELEPHONE	95,000	90,000	(5,000)	-5%	86,328	29,381
	55911	CLOUD INFRASTRUCTURE	82,000	130,000	48,000	59%	43,143	13,494
	56100	COMPUTER HARDWARE	66,200	66,200	200,000	0%	64,018	27,330
	56150 56225	COMPUTER SOFTWARE HARDWARE SERVICE & WARRANTIES	330,000 50,000	530,000 50,000	200,000	61% 0%	268,912 30,498	234,025 21,699
	56230	SOFTWARE MAINT & LICENSING	380,000	400,000	20,000	5%	338,290	114,689
	56550	THIRD PARTY SERVICES	10,000	65,000	55,000	550%	38,658	47,289
	56900	TRANSFER TO INDIRECT EXPENSES	(1,185,400)	(1,478,500)	(293,100)	25%	(1,141,736)	(543,928)
			(1,105,400)	(1,470,500)	(293,100)	2370	(1,1+1,750)	(343,728)
	TOTAL DIRECT EXP	ENSES	-	-	-		-	-
INDIRECT EXPENSES:			1 12 1 200	1 100 015	(12.2.12)	10/	1 410 100	454.005
	51199	SALARY EXPENSE BENEFITS EXPENSE	1,434,388	1,422,045	(12,342)	-1%	1,419,189	474,385
	51299 51955	CAPITAL LABOR & OVERHEAD	480,053 (210,000)	421,171 (75,000)	(58,882) 135,000	-12% -64%	426,935	126,346
	51955	OTHER INDIRECT EXPENSE	383,003	306,724	(76,279)	-04%	(75,555) 348,046	(34,442) 102,370
	TOTAL INDIRECT EX		2,087,445	2,074,941	(12,504)	-1%	2,118,614	668,659
	TOTAL INDIRECT EA	AI ENDES.	2,007,445	2,074,941	(12,304)	-1 70	2,110,014	000,039
	TOTAL ALL EXPENS	SES:	2,087,445	2,074,941	(12,504)	-1%	2,118,614	668,659
			(2.097.445)	(2.074.041)	12 504	10/	(2 110 (14)	
	NET INCOME (LOSS)		(2,087,445)	(2,074,941)	12,504	-1%	(2,118,614)	(668,659)

			Washington State Bar Association Budget Comparison					
VOLUNTEER ENGAGEMENTCost CenterFY25 REFORECAST FTE 1.20VEFY24 REFORECAST FTE 0.60		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD	
REVENUE:								
	TOTAL REVENUE	E	-	-	-		-	-
DIRECT EXPENSES:				60.0	(00			1.60
	50060	POSTAGE	-	600	600	1000/	571	468
	50110 50120	STAFF CONFERENCE & TRAINING	2,600	5,200	2,600	100% 0%	1,749	-
	50120 50130	STAFF MEMBERSHIP DUES SUBSCRIPTIONS	450 750	450 816	- 66	9%	300 815	210 358
	50130 52520	ABA DELEGATES				14%		338
		VOLUNTEER RECOGNITION	14,000	16,000	2,000 2,000	1470	18,649	-
	52521		-	2,000 12,000	12,000		-	-
	57450	REGULATORY SCHOOL	-	· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·	1000/	-	5,102
INDIDECT EVDENCES.	TOTAL DIRECT B	EAPENSES	17,800	37,066	19,266	108%	22,084	6,138
INDIRECT EXPENSES:	51199	SALARY EXPENSE	60,485	127,293	66,808	110%	60,598	38,563
	51299	BENEFITS EXPENSE	21,371	43,900	22,529	105%	20,940	14,556
	51900	OTHER INDIRECT EXPENSE	17.677	37,063	19,385	110%	16,242	14,571
	TOTAL INDIRECT		99,534	208,256	108,722	109%	97,781	67,689
			,	,	· · · · · · · · · · · · · · · · · · ·			<u> </u>
	TOTAL ALL EXPI	ENSES:	117,334	245,322	127,988	109%	119,864	73,828
	NET INCOME (LC	088):	(117,334)	(245,322)	(127,988)	109%	(119,864)	(73,828)
				(= ::;;===)	(12/3/00)	10770	((13)020)

				Was	hington State I	Bar Associa	ation	
			9/30/2024	9/30/2025			9/30/2024	1/31/2025
All Sec Cost Cen SECTOP	ter		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENU	JE: 48200	SECTION DUES	438,431	438,280	(151)	0%	425,235	365,036
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	-	-	-		-	141,745
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		-	-
	40500	INTEREST INCOME	17,147	2,050	(15,097)		108,323	-
	40800	PUBLICATIONS REVENUE	1,500	1,250	(250)		1,949	-
		OTHER	78,010	44,203	(33,807)		43,100	13,325
		SEMINAR PROFIT SHARE	153,875	159,700	5,825	4%	167,365	-
	TOTAL REVENUE		688,963	645,483	(43,480)	-6%	745,972	520,106
DIRECT	EXPENSES:							
		DIRECT EXPENSES OF SECTION ACTIVITIES	733,096	759,773	26,677	4%	317,333	108,457
		REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES	284,470	280,433	(4,037)	-1%	275,378	323,838
	TOTAL DIRECT EXPENSI	ES	1,017,566	1,040,206	22,639	2%	592,711	432,296
	NET INCOME (LOSS):		(328,603)	(394,722)	(66,120)	20%	153,261	87,810

ATTACHMENT B

				vv as	Budget Compari			
CLE - PRODUCT Cost Center CLEP	S FY25 REFOREC FY24 REFOREC		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	41000	SHIPPING & HANDLING	300	210	(90)	-30%	99	81
	43200	COURSEBOOK SALES	10,000	3,500	(6,500)	-65%	1,060	555
	43400	DIGITAL VIDEO SALES	900,000	845,000	(55,000)	-6%	1,030,455	513,223
	TOTAL REVEN	UE	910,300	848,710	(61,590)	-7%	1,031,614	513,859
DIRECT EXPENSES:								
	50110	STAFF CONFERENCE & TRAINING	312	-	(312)	-100%	-	-
	50120	STAFF MEMBERSHIP DUES	-	300	300		-	-
	52240	DISABILITY ACCOMMODATIONS	2,000	2,000	-	0%	584	-
	53220	COST OF SALES - COURSEBOOKS	1,100	300	(800)	-73%	69	38
	53260	OBSOLETE INVENTORY	-	-	-	10/	2,806	-
	53255	CLE-EQUIP-DEPRECIATION	2,040	2,012	(28)	-1%	2,040	680
	53285	ONLINE PRODUCT HOSTING EXPENSES	53,000	54,000	1,000 (300)	2% -60%	49,000	18,020
	<u>53330</u>	POSTAGE & DELIVRY-COURSEBOOKS	500	200	× /		43	31
	TOTAL DIRECT	LEAPENSES	58,952	58,812	(140)	0%	54,542	18,769
INDIRECT EXPENSES	5: 51199	SALARY EXPENSE	95,891	102,132	6,241	7%	96,650	34,942
	51299	BENEFITS EXPENSE	46,535	36,973	(9,562)	-21%	44,297	11,967
	51900	OTHER INDIRECT EXPENSE	38,006	32,973	(5,033)	-13%	32,170	10,928
	51936	FACILITY RESERVE REBATE	-	-	(3,055)	-15/0	(2,248)	-
	TOTAL INDIRE		180,432	172,078	(8,354)	-5%	170,869	57,837
				,			, -	,
	TOTAL ALL EX	PENSES:	239,384	230,890	(8,494)	-4%	225,411	76,605
	NET INCOME (LOSS):	670,916	617,820	(53,096)	-8%	806,202	437,253

			Washington State Bar Association Budget Comparison					
CLE - SEMINARS Cost Center CLES	FY25 REFORECAST I FY24 REFORECAST I		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
KEVENUE.	41800	SEMINAR REGISTRATIONS	825,000	725,000	(100,000)	-12%	651,706	159,535
	41825	SEMINAR REVENUE-OTHER	20,000	20,000	-	0%	51,802	800
	41850	SEMINAR SPLITS W/ CLE	(150,000)	(150,000)	-	0%	(135,134)	-
	TOTAL REVENUE		695,000	595,000	(100,000)	-14%	568,375	160,335
DIRECT EXPENSES:	50050	EQUIPMENT, HARDWARE & SOFTWARE			_		2,596	
	50100 50100	STAFF TRAVEL/PARKING	15,000	15,000	-	0%	14,718	- 53
	50110	STAFF CONFERENCE & TRAINING	2,465	5,900	3,435	139%	2,092	-
	50120	STAFF MEMBERSHIP DUES	1,000	1,200	200	20%	1,091	-
	50140	SUPPLIES	500	500	-	0%	379	-
	52240	DISABILITY ACCOMMODATIONS	5,000	5,000	-	0%	3,219	-
	53610	COURSEBOOK PRODUCTION	500	500	-	0%	18	-
	53640	ACCREDITATION FEES	3,000	3,000	-	0%	1,822	2,196
	53690	FACILITIES	160,500	165,000	4,500	3%	173,104	18,570
	53700	SPEAKERS & PROGRAM DEVELOP	45,000	48,000	3,000	7%	36,399	766
	53730	HONORARIUM	3,000 200	3,000	-	0% 0%	-	-
	<u>53740</u>	CLE SEMINAR COMMITTEE		200	- 11 125		-	-
INDIDECT EVDENCES.	TOTAL DIRECT EXP	ENSES	236,165	247,300	11,135	5%	235,438	21,586
INDIRECT EXPENSES:	51199	SALARY EXPENSE	487,487	528,792	41,305	8%	487,488	169,073
	51299	BENEFITS EXPENSE	188,518	191,718	3,200	2%	178,180	60,131
	51900	OTHER INDIRECT EXPENSE	194,448	171,510	(22,938)	-12%	165,230	57,151
	51936	FACILITY RESERVE REBATE	171,110	171,010	(22,990)	1270	(11,500)	-
	TOTAL INDIRECT EX		870,452	892,020	21,568	2%	819,399	286,355
			-) -)- *) 0	- *	-)	-)
	TOTAL ALL EXPENS	ES:	1,106,617	1,139,320	32,703	3%	1,054,836	307,940
	NET INCOME (LOSS)	:	(411,617)	(544,320)	(132,703)	32%	(486,461)	(147,606)

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			Budget Comparison					
DESKBOOKS Cost Center DESK	FY25 REFORECAST FTE FY24 REFORECAST FTE		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	43100	DESKBOOK SALES (LEXISNEXIS PRINT)	30,000	30,000	-	0%	18,240	-
	43450	SECTION PUBLICATION SALES	1,500	1,000	(500)	-33%	630	-
	43455	LEXIS/NEXIS ROYALTIES	75,000	75,000	-	0%	69,907	0
	43525	CASEMAKER ROYALTIES	30,000	25,000	(5,000)	-17%	37,575	-
	TOTAL REVENUE		136,500	131,000	(5,500)	-4%	126,352	0
DIRECT EXPENSES:								
	50120	STAFF MEMBERSHIP DUES	225	250	25	11%	248	-
	50130	SUBSCRIPTIONS	50	50	-	0%	43	-
	53210	COST OF SALES - DESKBOOKS	4,000	5,000	1,000	25%	5,154	-
	53225	COST OF SALES - SECTION PUBLIC	500	500	-	0%	429	-
	53260	OBSOLETE INVENTORY	21,000	48,250	27,250	130%	4,122	-
	53265	SPLITS TO SECTIONS	300	300	-	0%	185	-
	53270	DESKBOOK ROYALTIES	300	300	-	0%	305	-
	53320	POSTAGE & DELIVRY-COURSEBOOKS	-	300	300		-	-
	TOTAL DIRECT EXPENS	ES	26,375	54,950	28,575	108%	10,486	-
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	155,883	178,087	22,205	14%	159,210	84,959
	51299	BENEFITS EXPENSE	51,896	56,847	4,951	10%	51,270	19,464
	51900	OTHER INDIRECT EXPENSE	48,612	44,731	(3,881)	-8%	44,086	14,947
	TOTAL INDIRECT EXPE	NSES:	256,391	279,665	23,274	9%	254,566	119,370
	TOTAL ALL EVDENCES		292 7//	224 (15	21 040	100/	2(5.052	110.270
	TOTAL ALL EXPENSES:		282,766	334,615	51,849	18%	265,052	119,370
	NET INCOME (LOSS):		(146,266)	(203,615)	(57,349)	39%	(138,699)	(119,370)
			(1.0,200)	(====,===)			(100,077)	(11),0 (0)

ATTACMENT C

			Washington State Bar Association Budget Comparison					
CLIENT PROTECT Cost Center CPF	ION FUND FY25 REFORECAST I FY24 REFORECAST I		FY2024 Reforecast	FY2025 Reforecast	FY24 vs. FY25 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:	40500 44820 44840	INTEREST - INVESTMENTS CPF RESTITUTION CPF MEMBER ASSESSMENTS	180,000 10,000 525,930	200,000 10,000 720,540	20,000 - 194,610	11% 0% 37%	268,185 27,839 548,235	70,542 15,676 596,105
	TOTAL REVENUE		715,930	930,540	214,610	30%	844,259	682,323
DIRECT EXPENSES:	50020 50110 50120 54810 54820	BANK FEES STAFF CONFERENCE & TRAINING STAFF MEMBERSHIP DUES GIFTS TO INJURED CLIENTS CPF BOARD	3,000 - 200 500,000 2,000	2,500 1,700 200 500,000 2,000	(500) 1,700 - -	-17% 0% 0% 0%	(3,210) 200 418,710 887	(1,919) - - (166,480) -
	TOTAL DIRECT EXP	ENSES	505,200	506,400	1,200	0%	416,587	(168,399)
INDIRECT EXPENSES:	51199 51299 51900 51936	SALARY EXPENSE BENEFITS EXPENSE OTHER INDIRECT EXPENSE FACILITY RESERVE REBATE	110,717 41,259 36,238	115,160 38,272 31,439	4,443 (2,987) (4,799)	4% -7% -13%	110,405 40,214 31,099 (1,773)	38,874 12,302 10,425
	TOTAL INDIRECT E	XPENSES:	188,214	184,871	(3,343)	-2%	179,946	61,601
	TOTAL ALL EXPENS	SES:	693,414	691,271	(2,143)	0%	596,532	(106,798)
	NET INCOME (LOSS)):	22,516	239,269	216,753	963%	247,727	789,121

ATTACHMENT D

	2025 WSBA BUD CAPITAI			HEET				
	COST		QTY	AMOUNT	USEFUL LIFE (YRS)	ESTIMATED IN SERVICE DATE	ANNUAL DEPRECIATION EXPENSE	BUDGET FY 2025
Capital Labor (WSBA Developer Resources)								
Law Clerk Database	CLERK	60,000	1	60,000	5	Feb-25	18,006	12,004
Other development projects as needed	TBD	15,000		15,000	TBD	TBD	TBD	TBD
Total		75,000		75,000			18,006	12,004
Capital Hardware (General Indirects):								
Hardware replacements	INDIRECT	40,000	1	40,000	3	Oct-24	13,333	13,333
Total				40,000			13,333	13,333
Leasehold Improvements (General Indirects)								
Security System Upgrade	INDIRECT	10,000	1	10,000	10	Apr-25	1,000	500
Office Space Move/Downsizing Contingency	INDIRECT	10,000	1	10,000	10	Apr-25	750	750
Total				20,000			1,750	1,250
GRAND TOTAL				135,000			33,089	26,587

WASHINGTON STATE BAR ASSOCIATION

То:	Board of Governors
From:	Budget and Audit Committee
Subject:	Recommendations RE: Client Protection Fund Assessment and Practice Rule 15 Changes
Date:	April 14, 2025

ACTION REQUESTED: The Budget and Audit Committee recommends that the Board of Governors make the following recommendations to the Supreme Court:

- 1. Order that the Client Protection Fund assessment remain at \$20 for the 2026 licensing year.
- 2. Amend APR 15 Regulation 9(c) and (d) to increase the initial gift payment amount from \$5,000 to \$10,000.
- **3.** Amend APR 15 Regulation 9(b) to increase the per claim limit on gifts from \$150,000 to \$250,000.

BACKGROUND:

The Client Protection Fund (CPF) assessment is charged to all licensed active members, House Counsel, Foreign Law Consultants, pro hac vice admissions, and Limited License Legal Technicians. The assessment is the main source of funding that supports gifts to compensate those financially victimized by legal professional dishonesty or failure to account for client funds/property. Over the past 20 years, the assessment has ranged from \$10 to \$30 and is set at \$20 for 2025. The CPF is WSBA's sole legally restricted fund, with revenue and expenses accounted for separately and with designated separate bank accounts and investments. Depending on the health of the CPF reserves, the assessment amount may be adjusted. The level of reserves is most significantly impacted by the awards given each year (see attachment for historical gifts and fund balances). Payments are limited to a maximum of \$150,000 per awardee, with a preliminary payment of no more than \$5,000 (remaining funds awarded are paid out at the end of the fiscal year).

At it's April 14, 2025 meeting, the Budget and Audit Committee reviewed recommendations of the Client Protection Board (see *attachment A*) and unanimously approved three of the four recommendations to be moved forward to the Board of Governors.

ATTACHMENTS:

Attachment A: Client Protection Board Memo 3.24.2025 Attachment B: Memo Appendices A-E

WASHINGTON STATE

BAR ASSOCIATION

Office of General Counsel

Nicole Gustine, Assistant General Counsel

то:	Budget and Audit Committee of the WSBA Board of Governors, as Trustees of the Client Protection Fund	
FROM:	Nicole Gustine, Assistant General Counsel	
DATE:	March 24, 2025	
RE:	Client Protection Board Recommendations RE: Assessment and Admission and Practice Rule 15 Changes	

ACTION REQUESTED:

The Client Protection Board recommends that the Board of Governors make the following recommendations to the Supreme Court:

- 1. Order that the Client Protection Fund assessment remain at \$20 for the 2026 licensing year.
- 2. Include Limited Practice Officers in the order setting the assessment to the Client Protection Fund starting with the 2026 licensing year and continuing thereafter.
- 3. Amend APR 15 Regulation 9(c) and (d) to increase the initial gift payment amount from \$5,000 to \$10,000.
- 4. Amend APR 15 Regulation 9(b) to increase the per claim limit on gifts from \$150,000 to \$250,000.

I. BACKGROUND

The purpose of the Client Protection Fund (Fund) is to promote public confidence in the administration of justice and the integrity of the legal profession. The Fund may be used to relieve or mitigate pecuniary loss by any person, caused by a licensed legal professional's dishonesty, or failure to account for money or property entrusted to them, as a result of or directly related to the practice of law or while acting as a fiduciary in a matter directly related to the licensed legal professional's practice of law. Admission and Practice Rule (APR) 15 (a) and (b)(3). The Client Protection Board (CPB) meets quarterly to review applications to the Fund and to make decisions on payment for eligible claims.

The CPB met on February 3, 2025, and in addition to considering claims to the Fund, considered the four recommendations contained in this memo. The CPB examined historical and financial data and voted to make these recommendations to the Budget and Audit committee of the Board of Governors (BOG), who serve as Trustees of the Fund.

- II. The CPB recommends that the Board of Governors:
- 1. Recommend to the Supreme Court that the Client Protection Fund assessment remain at \$20 for the 2026 licensing year.



Per APR 15 Regulation 2. (b), the "Trustees may recommend to the Supreme Court that it order an annual assessment of all active lawyers, LLLTs, or LPOs of the Bar in an amount recommended by the Trustees to be held by them in trust for the purposes of the Fund."

WSBA Director of Finance Tiffany Lynch shared a November 2024 memo to the Budget and Audit Committee with the CPB and asked that the CPB make a recommendation as to setting the assessment for the 2026 licensing year. (Appendix A). Between 2010 and 2020, the assessment was set at \$30. Due to the Covid-19 pandemic, the BOG recommended, and the Supreme Court agreed, to order that the assessment be set at \$10 in 2021. The assessment was raised to \$20 for 2022 and 2023, lowered to \$15 in 2024, and raised back to \$20 in 2025. (Appendix B). As of December 31, 2024, the Fund had a balance of \$4,987,804 (Appendix C). Since 2014, the amounts of gifts paid on eligible applications to the Fund ranged from a low of \$253,228 in 2016, to a high of \$926,434 in 2018. (Appendix D). Weighing both the healthy balance of the Fund with the potential for increasing gift demand, the CPB voted unanimously to keep the assessment at \$20 for 2026.

2. Recommend that the Supreme Court's assessment order include LPOs starting with the 2026 licensing year and continuing thereafter.

Currently, WSBA lawyers on active status, lawyers with pro hac vice admissions, in-house counsel, house counsel, foreign law consultants, and Limited Licensed Legal Technicians (LLLTs) all pay an annual assessment to the Fund. Limited Practice Officers (LPOs) have not been included in the assessment. However, the CPB is authorized to accept and consider applications from, and award gifts to the injured clients of LPOs. APR 15(b)(3). To date, the CPB has received, considered, and approved a gift in the amount of \$2,800 on one claim regarding an LPO. Given the unpredictable nature of dishonesty and the resulting claims, there is the potential for more LPO-related applications to the Fund in the future. Therefore, the CPB is proposing that the BOG recommend that the Supreme Court include LPOs in the assessment order for the 2026 licensing year. An assessment of \$20 is reasonable because the clients of LPOs are equally at risk from the possibility of loss from their legal provider's dishonest conduct. The CPB acknowledges that a lower assessment may be appropriate given that LPOs generally charge less for their services than lawyers and that so far, they have not created as much loss exposure to the Fund. In addition, LPOs bear the mandated expense of carrying malpractice insurance. The recommendation to include LPOs in the 2026 assessment was unanimously approved by the members of the CPB.

3. Recommend a rule change to APR 15 Regulation 9 (c) and (d) to increase the initial gift payment amount from \$5,000 to \$10,000.

In September 2017, APR 15 Regulation 9(c) and (d) were amended to the following:

(c) Applications approved for \$5,000 or less shall be paid in full upon approval by the Client Protection Board (and the Trustees, if required under these Rules and Regulations). Applications approved for more than \$5,000 shall be paid \$5,000 upon approval by the Client Protection Board (and the Trustees, if required under these Rules and Regulations); payment of the remaining balance approved shall be deferred until fiscal year end and shall be subject to any proration which may be approved by the Trustees.

(d) At the last meeting of the Trustees for each fiscal year, the Client Protection Board shall report the total outstanding balance on approved gifts and shall recommend whether the outstanding balance should be paid in full or prorated. When approved gifts are prorated, the prorated payment shall reflect the total amount of the gift, less the initial \$5,000 payment made upon approval by the Client Protection Board

The CPB recommends amending the rule to raise the initial payment amount from \$5,000 to \$10,000. Because of the time it takes to process and approve a change to a court rule, acting on this recommendation now means that the initial payment amount will essentially be raised once within ten years, which is a reasonable economic adjustment. Further, this change will increase administrative efficiency and ease the accounting burdens of the Fund because amounts of \$10,000 or less could be fully processed at one time. Gift recipient satisfaction will also increase as they will receive either a more substantial initial payment or payment in full, earlier in the process. This will also save time and resources for WSBA staff processing the gift payments. This recommendation was unanimously approved by the members of the CPB.

4. Recommend a rule change to APR 15 Regulation 9(b) to increase the per claim limit on gifts from \$150,000 to \$250,000.

In September 2017 APR 15 Regulation 9(b) was amended to the following:

The maximum allowable amount of a gift is \$150,000. There is no limit on the number of gifts that can be made to reimburse clients for the wrongful acts of any one lawyer, LLLT, or LPO.

Prior to this 2017 change, the maximum gift amount had been \$75,000 since 2004. The Fund's balance has remained substantial in recent years since the 2017 increase to the \$150,000 gift limit. The CPB considered worst case scenarios, such as if in a future year, the Fund receives applications that qualify for payment in an amount that exceeds the resources of the Fund. The CPB determined that the Fund is protected in such a scenario because APR 15 Regulation 9(d) referenced above, gives the Trustees authority to prorate gifts at the end of the fiscal year. This rule provides the Trustees with flexibility to prorate and assure that the Fund's balance remains adequate to pay claims, even in the event of excessive claims.

The Fund continues to receive applications from injured clients who, through no fault of their own, have suffered losses over the \$150,000 limit. The CPB reviewed historical data to determine the number of approved applications since the 2017 change increasing the gift limit, where the applicant claimed a loss exceeding \$150,000, which would have otherwise been paid. There were six such claims paid between 2017 and 2024. (Appendix E). The gifts to these injured clients were more than \$700,000 less than needed to make them whole financially. Given the purpose of the Fund, and that revenue from assessments, restitution, and interest income have kept the financial condition of the Fund healthy and growing, the CPB unanimously approved a recommendation to a rule change increasing the maximum gift amount from the Fund to \$250,000.

III. Conclusion

The Client Protection Board thanks the Board of Governors for its consideration of its recommendations and welcomes additional questions or discussion.

WASHINGTON STATE BAR ASSOCIATION

То:	Budget and Audit Committee
From:	Tiffany Lynch, Director of Finance
Subject:	2026 Client Protection Fund Assessment
Date:	November 20, 2024

The Client Protection Fund (CPF) assessment is charged to all licensed active members, House Counsel, Foreign Law Consultants, pro hac vice admissions, and Limited License Legal Technicians. The assessment is the main source of funding that supports gifts to compensate those financially victimized by legal professional dishonesty or failure to account for client funds/property. Over the past 20 years, the assessment has ranged from \$10 to \$30 and is set at \$20 for 2025. The CPF is WSBA's sole legally restricted fund, with revenue and expenses accounted for separately and with designated separate bank accounts and investments. Depending on the health of the CPF reserves, the assessment amount may be adjusted. The level of reserves is most significantly impacted by the awards given each year (see attachment for historical gifts and fund balances). Payments are limited to a maximum of \$150,000 per awardee, with a preliminary payment of no more than \$5,000 (remaining funds awarded are paid out at the end of the fiscal year).

The Budget and Audit Committee will need to make a recommendation to the Board of Governors for the 2026 assessment rate (which is set by the Supreme Court) during this fiscal year. The CPF Board meets on a quarterly basis, with the next meeting scheduled for February 3, 2025, where they will be discussing and developing a recommendation for the 2026 assessment. Additionally, at their meetings this year the CPF Board may review the maximum award amount of \$150,000 (last raised from \$75,000 in 2016), consider increasing the preliminary payment from \$5,000 to \$10,000, and discuss applying the assessment to Limited Practice Officers. Approval of any of these changes could have an impact on future reserve balances.

We plan to include the 2026 CPF assessment on the B & A Committee's April 14, 2025 meeting agenda for action. If approved, the recommendation will be presented to the Board of Governors at the May 2-3, 2025 meeting.

Fiscal Year	Gifts To Injured Clients	Client Protection Fund Balance	Assessment Rate
2014	\$339,161	\$1,491,177	\$30
2015	\$490,357	\$2,144,289	\$30
2016	\$371,452	\$2,646,222	\$30
2017	\$318,584	\$3,242,299	\$30
2018	\$917,051	\$3,227,988	\$30
2019	\$379,818	\$3,816,144	\$30
2020	\$591,449	\$4,193,131	\$30
2021	\$499,637	\$4,046,247	\$10
2022	\$566,947	\$4,063,501	\$20
2023	\$342,424	\$4,513,398	\$20
2024	\$418,710	\$4,759,159	\$15
2025 Budget	\$500,000	\$5,000,335	\$20

Appendix B

Year	Assessment	Order
2025	\$20	25700-В-705
2024	\$15	25700-В-670
2023	\$20	25700-В-655
2022	\$20	25700-В-655
2021	\$10	25700-B-641, 25700-B-599
2010-2020	\$30	25700-B-587, 25700-B-496
2007-2009	\$15	
2001-2006	\$13	
1996-2000	\$10	

Statement of Financial Position				
	Unaudited As of 12/31/2024			
Assets Charling Assessment	169 775			
Checking Account	168,775			
Accrued Interest Receivable	41,249			
Money Market	2,790,747			
Investments	2,466,671			
Money Market				
Total Assets	5,467,443			
Liabilities and Net Assets				
Approved gifts to injured clients payable	378,125			
Liability to WSBA general fund	101,514			
Net Assets	4,987,804			
Total liabilities and net assets	5,467,443			

Statemer	nt of Activities
	Unaudited As of 12/31/2024
<u>Revenue</u> Restitution Member Assessment Interest Total Revenue	13,967 207,590 50,741 272,299
Expenses Misc. Gifts to Injured Clients CPF Board Staff Membership Dues Indirect (overhead) Total Expense	(1,779) - - - - 46,407 - 44,628
Net Income (Expense)	227,670

Statement of Changes in Net Assets					
4,759,353					
227,670					
4,987,804					
	4,759,353				

Appendix D

Client Protection Fund Applications 2014-2023

Fiscal Year	# Of Members ¹	# Of Members With Approved Applications	# Of Applications Received	# Of Applications Approved	Gifts Approved
2014	31,495	14	141	44	\$337,160
2015	31,335	20	79	59	\$495,218
2016	32,969	16	56	44	\$253,228
2017	33,357	19	72	47	\$439,273
2018	33,858	18	119	46	\$926,434
2019	34,388	18	61	48	\$419,488
2020	34,905	16	57	33	\$586,266
2021	34,839	18	107	29	\$491,737
2022	33,121	13	49	33	\$587,815
2023	33,383	14	41	42	\$342,424

¹ Through December 31, 2018, only lawyers on Active status, pro hac vice, in-house counsel, house counsel, and foreign law consultants paid the assessment. Effective January 1, 2019, Limited Licensed Legal Technicians (LLLTs), also paid the assessment.

Appendix E

\$150k CPF Gift Payments - FY 2017 through November 2024

			Application				
#	Attorney	Applicant	Amount	Status	Board Decision Date	Amount Paid	Unpaid
16-025	Gainer, Michael		244,207.00	Approved	11/8/2016	\$150,000	\$94,207.00
17-053	Neal, Christopher		262,815.00	Approved	5/7/2018	\$150,000	\$112,815.00
18-018	Johnson, Holly		430,000.00	Approved	11/6/2017	\$150,000	\$280,000.00
18-043	Siefkes, Michael		303,254.25	Approved	2/3/2020	\$150,000	\$153,254.25
18-098	Quick, Daniel		202,775.00	Approved	11/9/2020	\$150,000	\$52,775.00
19-043	Meade, Marcia		180,631.53	Approved	2/14/2022	\$150,000	\$30,631.53
			1,623,682.78			\$900,000	\$723,682.78

То:	Board of Governors
From:	Tiffany Lynch, Director of Finance Terra Nevitt, Executive Director
Subject:	License Fee Philosophy
Date:	April 14, 2025

FIRST READ: Proposed language to establish a license fee philosophy is presented for discussion and first read.

BACKGROUND:

The 2026 license fees set at the November BOG meeting were recommended as a starting point for developing a license fee philosophy. The Budget and Audit Committee was tasked with developing the draft philosophy, with the goal of creating a consistent approach by which fees would increase in alignment with an annual measure such as the cost-of-living adjustment (COLA) while also incorporating flexibility to adjust the fee based on availability of reserves. A preliminary draft of the philosophy was presented at the Board of Governors Budget Retreat on March 22, 2025. Suggestions for changes to the policy were provided and edits are included in the draft License Fee Philosophy (*attachment A*). Additionally, there was a request for information about the cost to practice law in other jurisdictions, which is provided in *attachments B* and *C*.

ATTACHMENTS:

License Fee Philosophy- April 2025 Draft (Attachment A) Mandatory Bar Fees (Attachment B) Total Cost to Practice (Attachment C)

April 2025 DRAFT – License Fee Philosophy

Adopted: Month D, YYYY.

A. Purpose

To create a consistent approach to setting license fees by which fees increase in alignment with an annual market measure (based on an industry benchmark defined in section D) that more closely ties to actual increases in the cost of doing business, while also incorporating flexibility to adjust the fee based on availability of reserves.

B. Philosophy

a. Philosophy regarding growth of the license fee

In order to maintain existing programing and services, it is anticipated that license fees will increase annually to account for increasing costs, including facilities, salaries and benefits, and direct costs. Increases will vary based on membership trends and the changes to the industry benchmark defined in section D. From that basepoint assumption, the license fee may need to be adjusted up or down to account for shifts in programming and the availability of reserves. Because license fees are set before all organizational needs are identified, WSBA should maintain reserves sufficient to seed desired shifts in programming, which will require increased license fees to maintain.

b. Philosophy regarding use of license fees

License fees are collected primarily to cover the cost of regulation, as well as programs mandated by the Supreme Court. At the discretion of the Board of Governors, license fees are also used to support programing, services, and the development of tools to serve other aspects of the mission, including supporting legal professionals to better serve the public and other purposes as articulated in GR12.

WSBA shall determine the criteria for evaluating all programs and services to determine resource allocation. Examples of criteria for evaluating member benefits could include: (1) how many members the activity can potentially benefit, (2) how closely the benefit is tied to or furthers a strategic goal, (3) how popular the benefit is, and (4) cost per member to fully or partially subsidize.

C. Process for developing a proposed license fee

Step 1: An effective license fee increase will be developed based on membership trends and apply the industry benchmark (defined in section D). This is considered the status quo effective license fee.

Step 2: Identify desired program shifts and their impact on the effective license fee.

Step 3: The effective license fee can be adjusted up or down based on the level of required reserves, as well as the level of reserves available. This is considered the status quo actual license fee change.

D. Industry Benchmark

Inflation reflects the average change in the price of goods and services over time. WSBA will use the Cost-of-Living Adjustment (COLA) for Washington State Labor and Industries (L&I) as the industry benchmark for calculating the effective license fee. The rate is established annually and will be used to develop a license fee recommendation in alignment with WSBA's annual budget and license fee approval process.

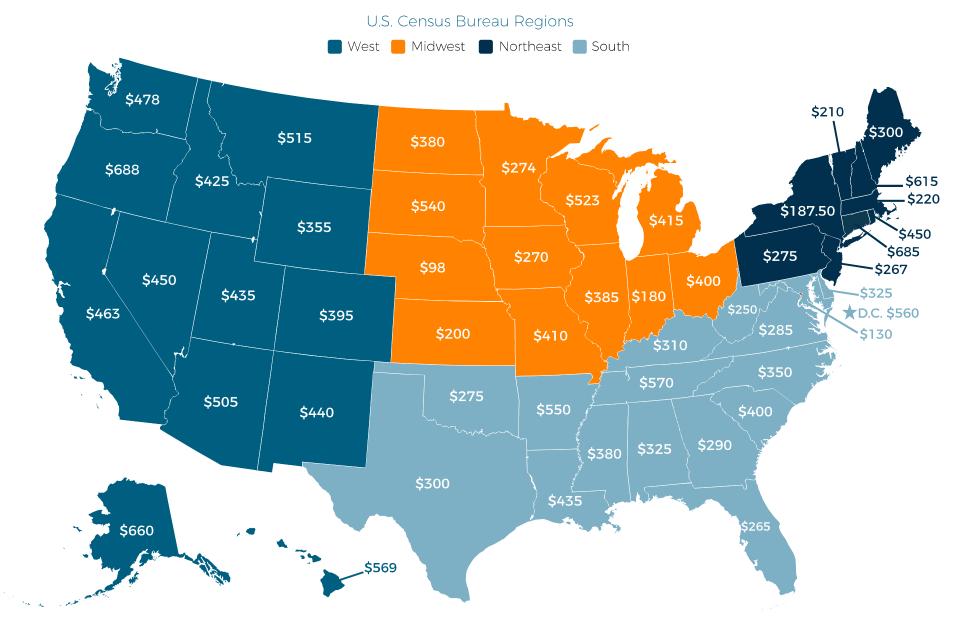
MANDATORY BAR ASSOCIATION FEES ¹					
State	ate Membership Total Cost to Practice			rked for Client rotection	
Alaska	4,786	\$	660.00	\$	10.00
Arizona*	25,873	\$	505.00	\$	20.00
California ^A	271,497	\$ \$	463.00	\$	40.00
District of Columbia	116,000		560.00	\$	-
Florida	112,515	\$	265.00	\$	25.00
Hawaii ^B	8,291	\$	569.00	\$	50.00
Idaho	7,175	\$	425.00	\$	-
Kentucky	19,581	\$	310.00	\$	7.00
Louisiana	28,369	\$	435.00	\$	-
Michigan*	42,073	\$	415.00	\$	15.00
Mississippi	11,111	\$	380.00	\$	-
Missouri	49,006	\$	410.00	\$	-
Montana	52,621	\$	515.00	\$	20.00
Nevada	12,301	\$	450.00	\$	50.00
New Hampshire	7,500	\$	615.00	\$	30.00
New Mexico*	8,102	\$ \$	440.00	\$ \$	15.00
North Carolina	43,945	\$	440.00		25.00
North Dakota	3,065	\$	380.00	\$	16.00
Oklahoma	18,734	\$	275.00	\$	50.00
Oregon* ^c	23,358	\$	688.00	\$	20.00
Rhode Island	6,319	\$ \$	425.00	\$ \$	25.00
South Carolina	11,003	\$	325.00		20.00
South Dakota	4,800	\$	540.00	\$	-
Texas	111,412	\$	300.00	\$	10.00
Utah*	13,861	\$	435.00	\$	5.00
Virginia	57,537	\$	285.00	\$	5.00
Washington	40,967	\$ \$	473.00	\$ \$	15.00
West Virginia	9,601	\$	250.00	\$	-
Wisconsin	19,927	\$	523.00	\$	25.00
Wyoming	3,378	\$	355.00	\$	-

Attachment B

*Mandatory Bar Associations most comparable to Washington based on size or scope of services provided. ^A\$125 increase had been requested, \$88 was approved. Total cost to practice in 2025 is \$598 for full active attorney. ^B\$150 increase had been requested. Updated information: total cost to practice in 2025 is \$679 for active attorney 5+ years of practice, including \$60 earmarked for Client Protection. ^C\$3,500 mandatory malpractice insurance required

¹ Information provided from 2024 ABA Bar Benchmarks Survey and International Survey of Attorney Licensing Fees compiled by Office of Attorney Ethics of New Jersey

TOTAL COST TO PRACTICE



LICENSING FEES

Total Cost to Practice & Licensing/Registration Fees

Includes all mandatory state bars reporting data and any state licensing agency or voluntary state bar reporting data for states without a mandatory state bar.

Enter the total cost to practice in your state (or territory).	Min	Max	Mean	Median	Responses
South	\$130	\$570	\$340	\$318	16
West	\$355	\$688	\$491	\$463	13
Northeast	\$188	\$685	\$377	\$288	10
Midwest	\$98	\$540	\$340	\$383	12
What is the total licensing/registration fee?	Min	Max	Mean	Median	Responses
South	\$130	\$380	\$263	\$265	16
West	\$275	\$688	\$470	\$450	13
Northeast	\$188	\$615	\$321	\$284	10
Midwest	\$98	\$540	\$327	\$327	12
**Provide the breakdown of fees for the cost to practice in your state (or territory).	Min	Max	Mean	Median	Responses
Client protection fund fee	\$5	\$130	\$32	\$25	28
Discipline system fee	\$25	\$260	\$164	\$165	20
Mandatory CLE fee	\$5	\$229	\$43	\$20	10
Lawyer assistance program fee	\$10	\$44	\$22	\$20	9
Legal services/legal aid/access to justice	\$2	\$65	\$32	\$36	7
Yearly Assessment	\$25	\$658	\$328	\$331	17
Other	\$6	\$450	\$177	\$180	15

**Categories with more than two responses only.

State/District/Territory

Total Cost to Practice in State & Licensing/Registration Fees

*Total licensing/registration fees include the highest fee.

State/District/Territory	Total Cost to Practice	*Highest Licensing/Reg. Fees	Cost to Practice Fees Breakdowns (If Known)
Alabama	\$325	\$325	Client protection fund fee: \$25
Alaska	\$660	\$660	Client protection fund fee: \$10; Discipline system fee: \$260; Mandatory CLE fee: \$12; Legal services/legal aid/access to justice: \$36; Other: \$342 (Administration, CLE, Fee Arbitration, Board of Governors, Lawyer Referral, Bar Rag, FastCase, Committees, Sections and WebPages
Arizona	\$505	\$485	Client protection fund fee: \$20; Yearly Assessment: \$485
Arkansas	\$550	\$200	Professional commission fee: \$200
California	\$463	\$390	Client protection fund fee: \$40; Discipline system fee: \$25; Building fund: \$4; Lawyer assistance program fee: \$10; Technology fund: \$5; Yearly Assessment: \$390 (The 2023 licensing fee is \$390. However, there is a \$2 Elimination of Bias opt-out fee. The building fund and technology fund fees are also included in the \$390 licensing fee.)
Colorado	\$395	\$395	Client protection fund fee: \$20; Yearly Assessment: \$375
Connecticut	\$685	\$575	Client protection fund fee: \$100
Delaware	\$325	\$325	N/A
District of Columbia	\$560	\$331	Mandatory CLE fee: \$229; Yearly Assessment: \$331 Mandatory annual license fee Active class members and Special Legal Consultants. Inactive members pay \$206; Judicial members pay \$150.
Florida	\$265	\$265	N/A
Georgia	\$290	\$264	Client protection fund fee: \$15; Professional commission fee: \$11
Hawaii	\$569	\$569	Client protection fund fee: \$50; Discipline system fee: \$250; Lawyer assistance program fee: \$44; Yearly Assessment: \$210 annual bar dues; Other: \$15 processing fee
Idaho	\$425	\$425	N/A
Illinois	\$385	\$385	Client protection fund fee: \$25; Discipline system fee: \$210; Professional commission fee: \$25; Lawyer assistance program fee: \$20; Legal services/legal aid/access to justice: \$10; Other: \$95 Lawyers Trust Fund fee
Indiana	\$180	\$180	Other: \$180 Attorney Services Fund

State/District/Territory	Total Cost to Practice	*Highest Licensing/Reg. Fees	Cost to Practice Fees Breakdowns (If Known)
lowa	\$270	\$270	Client protection fund fee: \$50; Discipline system fee: \$200; Mandatory CLE fee: \$20
Kansas	\$200	\$200	Discipline fee: \$180; Mandatory CLE fee: \$20
Kentucky	\$310	\$310	Client protection fund fee: \$7; Building fund: \$20; Mandatory CLE fee: \$48; Lawyer assistance program fee: \$15; Legal services/legal aid/access to justice: \$2; Other: \$218 General Dues
Louisiana	\$435	\$200	Discipline system fee: \$235; Yearly Assessment: \$435 (\$200 licensing/registration annual dues membership plus \$235 Disciplinary assessment)
Maine	\$300	\$300	Client protection fund fee: \$20; Discipline system fee \$260; Lawyer assistance program fee: \$20
Maryland	\$130	\$130	Client protection fund fee: \$130
Massachusetts	\$220	\$300	N/A
Michigan	\$415	\$415	Client protection fund fee: \$15; Discipline system fee: \$140; Yearly Assessment: \$260 Annual Bar Dues
Minnesota	\$274	\$274	N/A
Mississippi	\$380	\$380	Other: \$380 Enrollment fee
Missouri	\$410	\$259	Discipline system fee: \$101; Legal services/legal aid/access to justice: \$50; Note: Discipline system fee and Legal Services fee are in addition to the licensing/registration fee. Inactive attorneys do not pay the Discipline system fee nor the Legal services fee, only \$100 per year for licensing/registration.
Montana	\$515	\$515	Client protection fund fee: \$20; Discipline system fee: \$125; Mandatory CLE fee: \$45; One-time Assessment: \$25 State Bar of Montana Supreme Court Licensing Tax; Other: \$300 Dues
Nebraska	\$98	\$98	Discipline system fee: \$60; Yearly Assessment: \$25; Other: \$13 Commission on the unauthorized practice of law
Nevada	\$450	\$450	Client protection fund fee: \$50; Other: \$450 Active license renewal fee (\$50 of the fee goes to client's security fund)
New Hampshire	\$615	\$615	Client protection fund fee: \$30; Discipline system fee: \$245; Lawyer assistance program fee: \$30; Yearly Assessment: \$310
New Jersey	\$267	\$267	Client protection fund fee: \$46; Discipline system fee: \$201; Lawyer assistance program fee: \$10; Other: \$6 Board of Examiners
New Mexico	\$440	\$275	Client protection fund fee: \$15; Discipline system fee: \$150
New York	\$187.50	\$187.50	Client protection fund fee: \$30; Legal services/legal aid/access to justice: \$12.50; Yearly Assessment: \$25 Indigent Legal Defense

State/District/Territory	Total Cost to Practice	*Highest Licensing/Reg. Fees	Cost to Practice Fees Breakdowns (If Known)
North Carolina	\$350	\$325	Mandatory CLE fee: \$25; Yearly Assessment: \$300 Annual State Bar membership fee; Note: For 2023 & 2024 members were not required to pay a client security fund assessment; however, that can change from year to year.
North Dakota	\$380	\$380	Client protection fund fee: \$16 Discipline system fee: \$75
Ohio	\$400	\$400	N/A
Oklahoma	\$275	\$275	N/A
**Oregon	\$688	\$688	Client protection fund fee: \$20; Mandatory professional liability insurance: \$3,300; Yearly Assessment: \$658; Other: \$10 Loan Repayment Assistance Program
Pennsylvania	\$275	\$195	Client protection fund fee: \$50; Discipline system fee: \$195; Other: \$30 IOLTA
Rhode Island	\$450	\$225	Client protection fund fee: \$25; Yearly Assessment: \$225 (dues range is \$140-\$225); Other: \$200 Court licensing fees
South Carolina	\$400	\$300	Client protection fund fee: \$30; Discipline system fund fee: \$70
South Dakota	\$540	\$540	Yearly Assessment: \$415; Mandatory CLE fee: \$125
Tennessee	\$570	\$170	Client protection fund fee: \$10; Discipline system fee: \$140; Lawyer assistance program fee: \$20
Texas	\$300	\$235	Legal services/legal aid/access to justice: \$65
Utah	\$435	\$425	Mandatory CLE fee: \$10; Yearly Assessment: \$425
Vermont	\$210	\$210	N/A
Virginia	\$285	\$250	Client protection fund fee: \$5; Lawyer assistance program fee: \$30; Yearly Assessment: \$250 Member Dues (\$250 Active Members or \$125 Associate Members)
Washington	\$478	\$478	Client protection fund fee: \$20; Yearly Assessment: \$458
West Virginia	\$250	\$250	N/A
Wisconsin	\$523	\$523	Client protection fund fee: \$25; Discipline system fee: \$150; Mandatory CLE fee: \$11; Legal services/legal aid/access to justice: \$50; Other: \$287 State Bar membership dues
Wyoming	\$355	\$350	Mandatory CLE fee: \$5

**Oregon - Total cost to practice excludes \$3,300 for mandatory professional liability insurance that covers malpractice claims for attorney's whose principal place of business is located in Oregon.

- **TO:** Washington State Bar Association Board of Governors
- CC: Terra Nevitt, Executive Director
- FROM: Justin Bingham, Chair, WSBA Member Well-Being Task Force Dan Crystal, WSBA Member Wellness Program Manager and Staff Liaison to the WSBA Member Well-Being Task Force Adely Ruiz, WSBA Member Wellness Program Clinical and Outreach Lead and Staff Liaison to the WSBA Member Well-Being Task Force Kevin Plachy, WSBA Advancement Department Director and Staff Liaison to the WSBA Member Well-Being Task Force
 DATE: April 2, 2025
- **RE:** Interim Report from the WSBA Member Well-Being Task Force to the Board of Governors

Interim Report on the WSBA Member Well-Being Task Force.

BACKGROUND

In November 2023 the Board of Governors (BOG) adopted four strategic priorities for FY24. One of those priorities was to study member well-being and expand and improve resources for and assistance to legal professionals and the legal community. In furtherance of this organizational priority, the BOG approved the charter for the WSBA Member Well-Being Task Force (MWTF) in January 2024 and approved the Presidential appointment of Justin Bingham as Chair of the taskforce. In March 2024 the BOG approved the Presidential appointments of MWTF members.

The MWTF consists of 11 members, with 10 additional ad hoc members recruited to support the workgroups.

The charter requires the MWTF provide an interim report to the BOG in May 2025 and quarterly updates to the Member Engagement Council (MEC). The MWTF provided quarterly updates to the MEC in July and December 2024 and in April 2025.

This interim report details the MWTF's accomplishments to date, including details on monthly meetings, the member survey, and significant work of the five workgroups.

ACCOMPLISHMENTS

FIRST QUARTER ACCOMPLISHMENTS

The MWTF held its first meeting on March 28, 2024. That meeting was focused on orienting the taskforce members to the WSBA, reviewing volunteer roles and responsibilities, discussing our collaboration tools and review of the charter and timeline for deliverables.

During the remainder of the first quarter, the MWTF held three more meetings on May 6th, June 3rd, and July 1st. During those meetings the taskforce received two presentations. The first presentation was from Kyra Hazilla from the Oregon Attorney Assistance Program. Kyra reviewed the Oregon Taskforce's report and their process in studying member wellbeing during the duration of their taskforce. The second presentation was from Heidi Alexander, Director of Massachusetts Supreme Judicial Court Standing Committee on Lawyer Well-Being. Heidi's presentation included a review of the Massachusetts report, the national lawyer well-being movement, and the Institute for Well Being in Law's (IWIL) work, as well as Massachusetts process in drafting its report.

In subsequent meetings, the MWTF decided to establish three "sprint workgroups." Two of the workgroups would run for approximately four months and the third survey development workgroup would work to develop the survey scheduled to deploy no later than March 2025. The three workgroups are as follows:

- 1. Private Practice Workgroup
- 2. Law Student/New Member Workgroup
- 3. Member Survey Workgroup.

Chair Bingham assigned task force members to the three workgroups and assigned a Chair for each workgroup:

Private Practice Workgroup: Chair Annasarra Purcell; Members: Melissa Berry, Darcel Lobo, Kyle Sciuchetti
 Law Student/New Member Workgroup: Chair Susan Lee; Members: Bushra Rahim, Justice Raquel Montoya-Lewis,
 Member Survey Workgroup: Chair Emily Arneson; Members: Laura Moss, Michael Finkle, Justin Bingham.

The MWTF is supported by three WSBA staff liaisons; Dan Crystal, WSBA Member Wellness Program Manager, Adely Ruiz, Clinical and Outreach Lead, and Kevin Plachy, Advancement Department Director. Dan, Adely and Kevin have each been assigned to support each of the three workgroups. Dan was assigned to the Private Practice Workgroup, Adely to the Law Student/New Member Workgroup and Kevin to the Member Survey Workgroup. The staff coordinate the workgroup meetings and attend each of the meetings as both substantive contributors and internal WSBA support.

SECOND QUARTER ACCOMPLISHMENTS

During its second quarter, the entire MWTF met three times, and the workgroups met regularly. During this quarter the Chairs of each of the workgroups worked with MWTF Chair Justin Bingham to appoint ad hoc members to serve on the workgroups.

In addition to the normal task force and workgroup meetings, several of the MWTF members attended the Oregon State Bar Association's Wellness Summit, which was held on November 8, 2024, at the Oregon State Bar offices.

The MWTF also received a presentation from Ryann Peyton, the Executive Director of the Colorado Attorney Mentoring Program (CAMP).

The three workgroups engaged in the following activities during the second quarter:

Private Practice Workgroup

Three ad hoc members were recruited to serve on the workgroup: Annasara Purcell, Melissa Jaffe and Aaron Paker. The Private Practice Workgroup met 8 times . During that time the workgroup organized a short well-being survey that was delivered to over 30 attorneys at WSBA's Solo Small Practice Conference. The workgroup also reviewed other state reports and discussed insights and perspectives of the members serving on the workgroup who represent small, medium, and large firms. The pressure points in legal practice described in the survey and in the research performed by the workgroup, informed this workgroup's recommendations to the Survey Workgroup. The results are also informing recommendations for the MWTF draft report. The workgroup also researched ideas for a Washington state Well-Being pledge and showed real interest in the example provided by Colorado's program.

Law Student/New Member Workgroup

Two ad hoc members were recruited to serve on the workgroup: Phillip Lentz, Clinical Psychologist at University of Washington Law School and Seattle University's Dean of Admission Gerald Heppler.

The Law Student/New Member Workgroup met nine times. During that time the workgroup focused on the groundwork that would inform the final questions to recommend for the member survey. The group reviewed literature on attorney wellness and engaged in open dialogue on how this correlates with stressors encountered by new members and law students.

The workgroup also reviewed a collection of surveys administered by other law schools. The workgroup ended their research with an internal questionnaire that they provided to University of Washington, Seattle University, and Gonzaga Law schools. After analyzing the responses provided, they made their final recommendations to the Survey Workgroup. The workgroup is concluding their work by focusing on recommendations they would like to see provided for new members and law students.

Member Survey Workgroup

Three ad hoc members were recruited to serve on the workgroup: Professor Matt Thiese, Miriam Korngold, and Sara Smucker-Barnwell.

The Member Survey Workgroup met five times. During that time the workgroup made significant progress on development of a member survey. Workgroup members had two meetings with NBRI to discuss logistical details and

a deployment schedule for the survey. The workgroup decided to deploy the survey in late January, and it will run for three weeks. The workgroup developed a plan for Professor Matt Thiese from the University of Utah to analyze the survey results and provide a comprehensive report to the MWTF.

Oregon State Bar Wellness Summit

To better inform itself on current well-being initiatives, a cohort of MWTF members attended the Oregon State Bar Wellness Summit on November 8, 2025. Chair Bingham, Melissa Berry, Kyle Sciuchetti, and Kevin Plachy all attended the summit in person. Darcel Lobo, Dan Crysal, and Adely Ruiz attended the summit remotely.

POST SECOND QUARTER ACCOMPLISHMENTS

Wrap up of First Three Workgroups and Establishment of Additional Workgroups

The Private Practice and Law Student/New Member Workgroups concluded their work at the end of December 2024. The Member Survey Workgroup will run through May 2025. Starting in May 2025 each of the workgroups will work on a final workgroup report to be provided to Chair Bingham by June 27, 2025.

Starting in January 2025, two new workgroups were established. The two new workgroups are Suicide and Addiction and Government/Public Interest. These two workgroups will run through May 2025.

The members of each of the new workgroups and their activities to date are provided below.

Suicide and Addiction Workgroup

Members include Chair Emily Arneson, Bushra Rahim, Sara Smucker Barnwell, Susan Lee, and Laura Moss. Ad hoc members recruited to serve on the workgroup include Aaron Paker, Annasara Purcell, and Jenn Stuber. Dan Crystal is serving as a staff liaison to the workgroup.

Where other workgroups explore a domain of the legal profession, this group sought to address issues seen throughout the profession. Jenn Stuber is a suicidologist at the University of Washington, so her expertise was specifically sought out to guide the work. This group's focus at this point is the deployment of a short questionnaire related specifically to suicide and addiction that would be shared to myriad sections, affinity bars, county bar associations, and emailed to all attorneys through WSBA's newsletter Take Note. The workgroup is also reviewing research relevant to suicide and addiction in the legal profession. Once the suicide/addiction questionnaire results are received the workgroup will examine the results along with the results from the primary member survey and develop recommendations.

Government/Public Interest Workgroup

Members include Chair, Judge Michael Finkle, Justin Bingham, Melissa Berry, Darcel Lobo, Kyle Sciuchetti, and Justice Raquel Montoya-Lewis. Ad hoc members include Marci Comeau and Marlene Otero. Adely Ruiz and Kevin Plachy are serving as staff liaisons to the workgroup.

During their first meeting the workgroup established norms and discussed the appointment of ad-hoc members that have knowledge and expertise in government and legal aid practice. Once the workgroup was fully staffed, members began to discuss their own struggles and/or knowledge on negative and stigmatizing experiences in government and legal aid practice.

The workgroup diligently sought to identify research that could further validate their experiences and discovered there was a limited amount of data speaking to these issues. With this discovery, the workgroup members decided to develop their own questionnaire to gain more knowledge on the impacts of an attorney's well-being in government and public interest practice. The questionnaire was sent to various stakeholders on March 20th with a request to return responses by April 15th. During review of the results from the industry specific questionnaire and the general membership survey, workgroup members intend to formulate recommendations that will improve the practice of well-being for government and legal aid attorneys.

Future Workgroups

Three new workgroups will be established in July 2025. They are Diversity, Equity and Inclusion and Well-Being, Judicial Rules and Regulatory, and Lawyer Assistance Programs. These final workgroups will run through November 2025.

All the workgroups are required to submit a final workgroup report to the Chair and those final workgroup reports will provide the information for the Final Report which is due to the Board of Governors in March 2026.

At the March Task Force meeting Leslie Hagin provided a presentation. Leslie is a WSBA member and recently founded Washington's non-profit group Washington Lawyers Assisting Lawyers. Her group is actively providing Peer Counseling and trainings to Washington attorneys. She spoke about her own recovery from addiction and the incidence of alcoholism and mental health challenges in the legal profession.

MEMBER SURVEY

On January 28, 2025, the task force deployed a survey to 10,000 WSBA members to understand the relative wellbeing of members, the identification of challenges in various sectors of legal practice, the occurrence of mental health conditions or illness, and suggestions for the Task Force. The survey closed on February 20, 2025, and the Task Force received the raw survey results from NBRI shortly after the survey closed. WSBA contracted with Matt Thiese, a Professor from University of Utah to analyze the data from the survey and create a final survey report to the Task Force. Professor Thiese will provide the final survey report to the Task Force at the April meeting.

Survey Methodology

- Conducted by NBRI for WSBA,
- Survey period: January 28 February 20, 2025,
- Total responses: 903 members (9% response rate),
- 99.84% confidence level with a 5% margin of error,

The raw data from the survey along with the comments from respondents are provided in the attachments to this update. After the Task Force receives the final survey report and analysis from Professor Thiese we will review the results and integrate them into our final workgroup reports and the final report to the Board of Governors.

CONCLUSION

The Task Force remains on track according to the charter and "Timeline of Deliverables". The Task Force will continue meeting monthly, analyzing the results of the member survey to guide recommendations and future workgroup activities, and preparing the final report, due to the BOG in March 2026. The Task Force extends its thanks to the BOG for the opportunity to take the lead on this critical WSBA strategic priority.

ATTACHMENTS

- WSBA Member Well-Being Task Force Charter
- Timeline of Task Force Deliverables
- Meeting Agendas March 2024 to April 2025
- Meeting Minutes March 2024 to March 2025
- Workgroup Reports/Working Documents— Private Practice, Law Student/New Member, Survey, Government/Public Interest, and Suicide/Addiction Workgroups
- NBRI Raw Member Survey Information

CHARTER

Well-Being Task Force

Adopted: January 12, 2024.

Background

The Task Force seeks to (1) study well-being among WSBA members and the broader legal community in Washington and (2) make recommendations to enhance well-being for those same individuals and thereby improve the provision of legal services.

The Task Force will draw on the considerable and influential existing body of work compiled by national and state legal organizations, most prominently <u>The Path to Lawyer Well-Being</u>: <u>Practical Recommendations for Positive Change</u>, authored by the National Task Force on Lawyer Well-Being, a coalition of organizations including the National Organization of Bar Counsel (NOBC), the Association of Professional Responsibility Lawyers (APRL) and the <u>American Bar Association's Commission on Lawyer</u> <u>Assistance Programs</u> (CoLAP). Following publication of the report in 2017, both the ABA and the Conference of Chief Justices passed resolutions urging all states to review and consider the report's 44 recommendations. Subsequently, 26 states have formed well-being committees and another eight states have held well-being conventions or "summits."

In November 2023, at the recommendation of the Member Engagement Council (MEC), the WSBA Board of Governors (BOG) voted to adopt member wellness as an organizational priority. Creating a Well-Being Task Force (which was also part of the MEC's recommendation) is the first step in acting on that priority.

Task Force Objectives

The Task Force's primary objective will be to create a report synthesizing the Task Force's research and recommending tangible steps WSBA can take to enhance well-being among WSBA members and the broader legal community in Washington. This objective will be achieved by accomplishing two subsidiary objectives:

1. Create Workgroups to Research Well-Being Across the Various Sectors of the Legal Profession in Washington and the U.S.

By the end of its second meeting, the Task Force will establish multiple workgroups to research well-being across various sectors of the legal profession. The workgroups will be comprised of Task Force members and additional non-voting members if desired, such as WSBA employees and members of relevant associations (e.g., Superior Court Judges Association, District and Municipal Court Judges Association, and Appellate Judges Association). The workgroup members will be appointed by the Chair of the Task Force, with consent of a majority of the task force members.

Each workgroup will focus on one or more sectors of the legal profession, with the goal of bringing recommendations to the Task Force of how to raise awareness and/or prioritize well-being within those sectors. Examples of sectors could include types of practice (e.g., private practice, in-house, judiciary, public/government practice), law schools/law clerk programs, member wellness programs, professional

liability insurance carriers, and professional regulatory systems.¹ Topics of workgroup focus could include substance use, structural and systemic oppression, student loan challenges, marginalization and experiences of othering, discrimination or bias, balancing work and family life, the impact of remote work, and other concerns. The foregoing examples of sectors and topics are not exhaustive, and the term "sectors of the profession" should be interpreted broadly.

Workgroups will be tasked with:

- recruiting relevant contributors, both within the profession, and outside of the profession, to participate in each workgroup's research;
- conducting outreach to and receiving feedback from sectors of the profession relevant to the workgroup;
- reviewing well-being recommendations nationwide and determining which appear most relevant to legal practice in Washington;
- understanding the state of research regarding mental health; and
- providing a final report to the full Task Force, containing its findings and recommendations.

2. Create a Workgroup to Investigate Well-Being Among WSBA Members

The Task Force will also form a workgroup to investigate well-being among WSBA members. This workgroup's primary goal will be to develop and deploy a member survey by no later than the end of the Task Force's first year. Areas of inquiry for the survey may include the relative well-being of members, the identification of challenges in legal practice, the occurrence of mental health conditions or illness, and suggestions for the Task Force. The workgroup may also solicit member feedback through listening sessions, focus groups, and other forms of interaction. The workgroup will provide a final report to the full Task Force, containing its findings and recommendations.

Timeline

The Task Force will have a duration of two years from the date of its first meeting and will meet monthly or at other intervals determined to be appropriate by the Chair. The Task Force will provide quarterly reports to the Member Engagement Council, an interim written report to the Board after its first year of operation, and a final report to the Board at conclusion of its two-year duration. The Task Force may also report to the Member Engagement Council or the Board on an interlocutory basis if urgent issues arise.

¹ In adopting this Charter, the Board of Governors recognizes that Washington State's professional regulatory systems for legal practitioners are created by and answerable to the Washington Supreme Court exclusively. To the extent the Task Force has ideas or recommendations that would implicate regulatory processes, procedures, policies, or rules, the Task Force should work collaboratively with the pertinent stakeholder(s) and direct any recommendations to the appropriate regulatory staff or board, the Disciplinary Advisory Round Table, and/or the Supreme Court.

Composition

The Task Force shall consist of nine voting members and two non-voting judicial members, as follows:

- Chair (voting)
- 1 Current or Former BOG Member (voting)
- 4 WSBA Members (voting)
- 1 Member of the State Supreme Court (non-voting)
- 1 Adjudicative Officer in Washington State (non-voting)
- 1 Law School Representative (student or employee; voting)
- 2 Public Members (voting)

Further membership criteria is detailed in the appendix below.

Nominations and Appointment

Except for the State Supreme Court member, who will be determined by the Supreme Court, the WSBA President will appoint Task Force members in accordance with WSBA Bylaws Art. IX.B.2 taking into account the recommendation of the Co-Chairs of the Member Engagement Council. The President shall appoint the Task Force Chair taking into account the recommendation of the Co-Chairs of the Member Engagement Council. The WSBA Executive Director will designate the WSBA staff liaison(s).

Terms

Task Force members will serve for the two-year duration of the Task Force. The WSBA President will appoint any replacement members (if necessary) taking into account the recommendation of the Co-Chairs of the Member Engagement Council.

Final Report

At the end of its duration, the Well-Being Task Force will issue a final report to the Board of Governors. The report will (1) evaluate the scope and efficacy of the Task Force's achievements, and (2) provide feasible recommendations to improve well-being within the legal profession in Washington State.

APPENDIX

The following non-exclusive criteria shall be prioritized for membership on the Task Force:

Practice Types and Venues

The Task Force seeks participation from attorneys from various practice types and venues. Solo attorney participation will be important to prioritize the pressure they face in running their business, marketing, and having support staff to help manage their client base. Attorneys in mid-size or large firm settings face very different wellness challenges in keeping up their billable hour requirements and responding to management pressures upon their performance. Civil legal aid lawyers and public defenders face challenges of secondary trauma from working with clients who experience poverty and other forms of oppression. Government attorneys face challenges with unique bureaucratic responsibilities, and in house counsel face the demands of the companies they support.

Years of Bar Licensure

The Task Force seeks participation from attorneys at all stages of their careers. Early career attorneys face major pressures as they adapt to a profession that they were typically not trained for in law school. Midcareer attorneys often struggle with transitioning to a more hospitable work environment or to use a skill set more to their liking. Late career attorneys handle the question of when to retire and to manage, in some cases, changes in mental capacity.

Experience or Interest in Well-Being

The Task Force seeks participation from legal professionals with an interest in enhancing the well-being of the profession. Those who have original insights into what they think legal professionals need to feel more engaged and at ease will be prioritized. Those with volunteer experiences or connection to mental health venues will also be an asset.

Mental Health Professionals

The Task Force seeks participation from experienced mental health professionals who are not lawyers but have familiarity with the legal profession. Their expertise will inform the Task Force's recommendations and decision making.

Diversity, Equity, and Inclusion

The Task Force seeks participation from people from marginalized communities (e.g., people of color, people from the LGBTQ2S+ community, people with disabilities). Having a diverse group of members is vital to promote diversity, equity and inclusion goals, particularly given that these communities disproportionately experience mental health challenges and other wellness-related issues due to historical and ongoing marginalization, discrimination, access to healthcare, and other reasons.

Geography

Geography The Task Force seeks participation from legal professionals and others throughout Washington to ensure consideration of wellness issues in all parts of the state , with particular attention to the different issues in rural and urban areas. To obtain geographic diversity, at least two Task Force members

Well-Being Task Force Charter

must reside east of the Cascades and at least one other member must reside outside of King, Pierce, and Snohomish Counties.

Member Wellbeing Taskforce Timeline for Deliverables

Workgroup Timelines:

Private Practice and Law Student Workgroups (Duration June 2024 through December 20, 2024 and reconvene in June 2025 to finalize workgroup report) :

- <u>Ad-Hoc Members:</u> Up to three identified ASAP.
- **<u>Verbal Progress Update</u>**: To be delivered monthly at the full taskforce meeting.
- Draft Survey Questions: Delivered to the Survey Workgroup by September 30, 2024. Recommend 5-10 questions and rank them in order of preference. The length of the survey is limited so final decisions on selected questions will be made by the Survey Workgroup taking into consideration the stated preferences of the workgroup.
- <u>Written Update</u>: to entire TF due to Chair by September 30th. This update does not need to be formal. A page long update outlining work plan, outreach/research methods, and progress towards the formulation of recommendations will suffice.
- Written "Formal Interim" Report due to Chair by December 20, 2024 .
- Workgroups Go on Hiatus.
- Workgroups Will Reconvene in Mid-April to May 2025 to Finalize Workgroup <u>Report after Receipt of Survey Results on April 7th</u>: Finalize Workgroup Report by June 27th, 2025.

Timeline for Survey Workgroup (Duration June 2024 to June 2025):

- Ad-Hoc Members: Up to three identified ASAP.
- Verbal Progress Update: To be delivered monthly at the full taskforce meeting.
- **Determine Survey Domains and Plan for Data Analysis:** By September 30th.
- Draft of Survey to Chair: By October 28th.
- Initial Review of Draft Survey by Full Taskforce: At the November 4th meeting.
- Finalize Survey Questions, Confirm Plan for Data Analysis and Review with NBRI: By November 29th.
- Final Review by Taskforce Members (could occur at Dec. meeting or over Email): By December 9th.
- **<u>Submit Final Survey Questions to NBRI</u>:** By December 20th.
- **Deploy Survey:** On January 13th.

- <u>Close Survey:</u> On February 7th.
- **<u>Receive Survey Results from NBRI</u>**: By February 14th.
- <u>Perform Data Analysis and Review with Survey Workgroup (Matt)</u>: At March 10th Survey Workgroup Meeting.
- Formal Presentation of Survey Results with Entire Taskforce: April 7th Meeting.
- Draft Final Workgroup Report: By June 27th.

<u>Suicide – Addiction - Burnout / Judicial - Rules – Regulatory Workgroups (Duration</u> January 2025 to May 2025):

<u>Note:</u> The Survey Workgroup will still be going at this time so the members of the taskforce not serving on the Survey Workgroup should be appointed to these two workgroups.

- Ad-Hoc Members: Up to three identified ASAP.
- **Verbal Progress Update:** To be delivered monthly at the full taskforce meeting.
- <u>Written Update</u>: to entire TF due to Chair by March 28, 2025. This update does not need to be formal. A page long update outlining work plan, outreach/research methods, and progress towards the formulation of recommendations will suffice.

Final Workgroup Report Writing:

- During the month of June, the two workgroups (and the Private Practice and Law Student/New Member Workgroups) will work on report writing with the objective of producing Final Reports by **June 27, 2025**.
- Final workgroup reports will be reviewed at the July full taskforce meeting.

DEI and Well-Being / Government – Legal Aid / LAP – Member Wellness Programs Workgroups (Duration July 2025 to November 2025)

- **<u>Ad-Hoc Members:</u>** Up to three identified ASAP.
- **<u>Verbal Progress Update</u>**: To be delivered monthly at the full taskforce meeting.
- <u>Written Update</u>: to entire TF due to Chair by **September 26, 2025**. This update does not need to be formal. A page long update outlining work plan, outreach/research methods, and progress towards the formulation of recommendations will suffice.

Final Workgroup Report Writing:

- During the month of December, the three workgroups will work on report writing with the objective of producing Final Reports by **December 30, 2025.**
- Final workgroup reports will be reviewed at the January full taskforce meeting.

Full Taskforce Timelines:

Updates to Member Engagement Council:

- November 2024 (Exact Date TBD)
- February 2025 (Exact Date TBD)
- May 2025 (Exact Date TBD)
- August 2025 (Exact Date TBD)
- November 2025 (Exact Date TBD)
- February 2026 (Exact Date TBD).

Interim BOG Report Writing (Kevin, Dan, and Adely can work on this report) :

- Interim BOG report is less formal than the final report. It will consist of a Memo to the Board of Governors breaking down the work that has been completed along with attachments of the actual work (i.e. interim reports from Private Practice and Law Students/New Member workgroups, member survey results, charters for the ongoing workgroups) and an explanation of the ongoing work.
- A draft of the Interim BOG Report should be delivered to the Chair by **February** 24, 2025.
- Draft of the report will be reviewed by the full taskforce at the March 3rd meeting.
- Final Interim BOG Report due to the Chair by March 31, 2024.
- Final report to be reviewed by entire taskforce at **April 7th meeting**.
- Submit final report for BOG meeting materials on April 8th.
- Deliver report to the BOG at the May 2-3, 2025, BOG Meeting.

Final BOG Taskforce Report Writing Workgroup (Duration January 2026 through March 2026):

- Deliver first draft of report to Chair by January 26, 2026.
- Review first draft with full taskforce at **February meeting**.
- Deliver final draft of report to Chair by **February 20, 2026**.
- Review final draft with full taskforce at March meeting.
- Work with WSBA Communications to finalize WSBA branded report by March 31, 2026.
- Deliver at next BOG meeting after March 31, 2026.

Well-Being Taskforce Inaugural Meeting Agenda March 28, 2024, 3:00-5:00pm Zoom - Remote Meeting

Zoom Conference Call Line: (253) 215-8782 Meeting ID: 834 5772 2618 || Passcode: 350121

Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Jenn Stuber, Anna Endter, Ghousia Rahim, Michael Finkle, Laura Moss,

WSBA Staff Present: Dan Crystal, Adely Ruiz, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

- Welcome. Summary of meeting Agenda. (Justin, 5 min)
- Introductions. Why is well-being in the legal profession a personal mission? (25 min)
- Volunteer Roles and Responsibilities (Dan, 10 min)
 - o Bylaws
 - o Committees and Boards Policies
 - o Open Meetings and Public Records Requests
 - Roles of liaisons. Framework for communicating.
- Reviewing the charter. Framework for handling meetings. (Justin, 10 min)
 - Scheduling, frequency
 - Rules for Group Process
 - Describing workgroups and the survey.
- Introduction to the Member Wellness Program (Adely, 10 min)
- The Well-Being in Law Movement (Dan, 15 min)
 - o The Path to Lawyer Well-Being
 - The Well-Being Pledge
 - o IWIL
 - o Michigan Report
 - Taskforce Victories
- Discussion of Taskforce priorities (15 min, time permitting)
- Adjourn

Well-Being Taskforce Monthly Meeting Agenda May 6, 2024-4-5:30pm- Zoom link here

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442 Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Jenn Stuber, Anna Endter, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss.

WSBA Staff Present: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

- Welcome. (Justin, 10 minutes)
 - Summary of meeting Agenda.
 - Approval of previous meeting's minutes.
 - o Confirmation of schedule for future meetings.
- Introductions. Those who could not attend the previous meeting can share why Attorney Well-Being is important to them. (Darcel, Anna, Jenn--15 min)
- Kyra Hazila, JD, LCSW Oregon Attorney Assistance Program (20 minutes)
 - Will discuss Oregon's report included in reading materials this week.
- Workgroup discussion. Identification of topics, number of workgroups, and composition of workgroups. (Justin, 40 min)
- Adjourn

Well-Being Taskforce Monthly Meeting Agenda June 3, 2024-4-5:30pm- Zoom link here

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442 Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Jenn Stuber, Anna Endter, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss. BOG Liaison Nam Nguyen WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

- Welcome. (Justin, 10 minutes)
 - Summary of meeting Agenda.
 - Approval of last meeting's minutes.
 - o New Law Student Representative Susan Lee.
 - o BOG Liaison Nam Nguyen
- Heidi Alexander, Director of Massachusetts SJC Standing Committee on Lawyer Well-Being (30 minutes)
 - Will discuss explore the national lawyer well-being movement and IWIL's work, as well as Massachusetts process in drafting its report.
- Workgroup discussion. Feedback about workgroup preferences based upon these initial assignments. (Justin, 50 min)
 - Identification of workgroup chairs.
 - Will also discuss using multiple zooms for the next meeting.
- Adjourn

Well-Being Taskforce Monthly Meeting Agenda July 1, 2024-4-5:30pm- Zoom link here

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442 Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Jenn Stuber, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss. BOG Liaison Nam Nguyen WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin, 10 minutes)

- Summary of meeting Agenda.
- Approval of last meeting's minutes.
- Guidance on Workgroup process and objectives for the breakouts.

Breakout Rooms for Workgroups (50 minutes)

- Identify a time to meet each month, including a July date
- o Identify three WSBA contributors
- Reflect on personal priorities as it pertains to the workgroups.
- Identify useful experts in these domains to inform the conversation.

Group Discussion (30 minutes)

- Reporting out about workgroup discussions.
- Group process about the direction of the Taskforce

Well-Being Taskforce Monthly Meeting Agenda August 5, 2024-4-5:30pm- <u>Zoom link here</u>

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442 Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss. BOG Liaison: Nam Nguyen. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin, 10 minutes)

- Welcome Law School Interns Elaine McDaniel (SU) and Selena Liu (UW)
- Approval of last meeting's minutes.
- Replacing Taskforce member.
- Introduce ad hoc members present and identifying the roles of ad hoc members vs. Taskforce members.
- Timelines for reports from Workgroups.
- Identifying writers for report writing.

Breakout Rooms for Workgroups (60 minutes)

- Confirming meeting times.
- Identifying report writers.
- Reflecting upon the merits of the assigned reading.
- Identify useful experts in these domains to inform the conversation.

Group Discussion (20 minutes)

- Reporting out about workgroup discussions.
- o Group process about the direction of the Taskforce

Well-Being Taskforce Monthly Meeting Agenda September 9, 2024-4-5:30pm- Zoom link here

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442 Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Nam Nguyen. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin, 20 minutes)

- o Introducing Taskforce member Sara Smucker Barnwell
- Approval of last meeting's minutes
- State Recommendations memo: research methods and recommendations from OR, CO, NY and MA.
- Taskforce Timelines memo: workgroups research, recommendations, and interim reports.
- Workgroup research: Identifying questions for the survey and focus groups.

Breakout Rooms for Workgroups (50 minutes)

- Confirming meeting times
- Review timeline for deliverables
- Review of research methods and questions
- Discuss recommended questions for the survey
- o Discuss recommendations for the report

Group Discussion (20 minutes)

- Reporting out from workgroup discussions
- o Group process about the direction of the Taskforce

Well-Being Taskforce Monthly Meeting Agenda October 14, 2024-4-5:30pm- Zoom link here

Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442 Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin, 10 minutes)

- Acknowledgment that this meeting is during Indigenous Peoples/Columbus Day.
- Approval of last meeting's minutes
- o Oregon's Wellness Summit
- Discuss status of survey questions from workgroups.

Breakout Rooms for Workgroups (60 minutes)

- o Review timeline for deliverables
- o Discuss recommended questions for the survey
- o Discuss research and recommendations for the report

Group Discussion (20 minutes)

- Reporting out from workgroup discussions
- Group process about the direction of the Taskforce

Well-Being Taskforce Monthly Meeting Agenda November 4, 2024-4-5:30pm- Zoom link here

Zoom phone#: (253) 215-8782 Meeting ID: 815 4476 4463 || Passcode: 720331 Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin, 10 minutes)

- Approval of last meeting's minutes
- o Oregon's Wellness Summit 11/8
- <u>Illinois report</u> on bullying in the legal profession.
- o Feedback on WSBA Equity and Justice Plan
- The next two workgroups: 1. Government and Legal Aid 2.
 Suicide and Addiction
- o Setting agenda for Workgroups report writing

Guest Speaker Ryann Peyton from the Colorado Attorney Mentoring Program (CAMP)-(30 minutes)

Breakout Rooms for Workgroups (40 minutes)

- Review timeline for deliverables
- Discuss research and recommendations for the report
- Assign writing roles to members

Group Discussion (10 minutes)

o Brief reporting out from workgroup discussions

Well-Being Taskforce Monthly Meeting Agenda December 2, 2024-4-5:30pm- Zoom link here

Zoom phone#: (253) 215-8782 Meeting ID: 824 4373 0929 || Passcode: 556585 Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin, 10-15 minutes)

- Approval of last meeting's <u>minutes</u>
- Oregon's <u>Wellness Summit</u>
- Next month's meeting on 1/13 at 4
- The next two workgroups planning: 1. Government and Legal Aid 2. Suicide and Addiction
- Providing feedback to the survey group (Emily)
- o Setting agenda for Workgroups report writing

Breakout Rooms for Workgroups (55 minutes)

- o Review timeline for deliverables
- \circ $\,$ Discuss research and recommendations for the report
- Assign writing roles to members

Group Discussion (20 minutes)

• Brief reporting out from workgroup discussions

Well-Being Taskforce Monthly Meeting Agenda January 13, 2025-4-5:30pm- Zoom link here Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin)

- o Approval of last meeting's minutes
- Status of Survey (Emily)
- Timeline for previous workgroups reconvening to finish reports.
- The next two workgroups planning: 1. Government and Legal Aid 2. Suicide and Addiction

Breakout Rooms for Workgroups (45 minutes)

- Discuss individual priorities as they relate to these workgroups
- Brief discussion of state reports relevant to each workgroup
- Schedule a time to meet outside of the Taskforce meeting
- o Review timeline for deliverables

Group Discussion (20 minutes)

• Brief reporting out from workgroup discussions

Well-Being Taskforce Monthly Meeting Agenda February 3, 2025-4-5:30pm- Zoom link here Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin 10 min)

- Approval of last meeting's minutes
- Introduction of ad hoc members: Jenn Stuber, Aaron Paker (returning), Annasara Purcell (returning), Marci Comeau, and Marlene Otero

Breakout Rooms for Workgroups (55 minutes)

- Confirm meeting schedule
- Create a timeline for surveys (if applicable), speakers, and report writing.

Group Discussion (15 minutes)

o Brief reporting out from workgroup discussions

Well-Being Taskforce Monthly Meeting Agenda March 3, 2025-4-5:30pm- Zoom link here Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin 10 min)

- Approval of last meeting's <u>minutes</u>
- o Survey updates
- Time frame for workgroups

Guest Speaker: Leslie Hagin from Washington Lawyers Assisting Lawyers (15 minutes + questions)

Breakout Rooms for Workgroups (40 minutes)

- Confirm meeting schedule
- Create a timeline for surveys (if applicable), speakers, and report writing.

Group Discussion (15 minutes)

• Brief reporting out from workgroup discussions

Well-Being Taskforce Monthly Meeting Agenda April 7, 2025-4-5:30pm- Zoom link here

Website, SharePoint

Taskforce Members: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell. BOG Liaison: Allison Widney. WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Agenda

Welcome. (Justin 15 min)

- Approval of last meeting's <u>minutes</u>
- Survey updates
- Annual report to BOG
- Time frame for workgroups

Breakout Rooms for Workgroups (60 minutes)

• Create a timeline for surveys (if applicable), speakers, and report writing.

Group Discussion (15 minutes)

• Brief reporting out from workgroup discussions

Draft Well-Being Taskforce Inaugural Meeting Minutes March 28, 2024, 3:00-5:00pm, hosted on Zoom

Attendance: Justin Bingham, Judge Michael Finkle, Emily Arneson, Melissa Berry, Kyle Sciuchetti, Laura Moss, Ghousia Bushra Rahim

WSBA Staff Present: Dan Crystal, Adely Ruiz, Kevin Plachy

Absent: Darcel Lobo, Jenn Stuber, Anna Endter

Meeting Minutes

- Welcome. Summary of meeting Agenda. (Justin, 5 min)
 - o Discussed value of Well-being in the profession
 - Their passion for WBT
- Introductions. Why is well-being in the legal profession a personal mission? (25 min)
- Reviewed Volunteer Roles and Responsibilities (Dan, 10 min)
 - Bylaws, Committees and Boards Policies, Open Meetings and Public Records Requests, Roles of liaisons. Framework for communicating.
- Reviewing the charter. Framework for handling meetings. (Justin, 10 min)
 - Scheduling, frequency
 - Kyle S. cannot meet on last Thursday of the month
 - Judge Michael F. lunch hour or Monday afternoons around 3:30pm
 - Emily A. flexible except for Wednesdays during lunch hour; prefers early morning
 - Melissa B. Monday Afternoons after 3pm generally work; can make early morning work
 - Dr. Moss; 7:30am Mon, Tue, not available on Monday afternoons
 - Bushra; Monday afternoon at 3:30 and Monday early in the morning
 - Rules for Group Process
 - Establishing meeting style
 - Informal but formal for motions and decisions required of the group
 - Describing workgroups and the survey.

- Kevin P- noted that workgroups do allow ad hoc members; this can be a resource to our workgroups
- Introduction to the Member Wellness Program (Adely, 10 min)
- The Well-Being in Law Movement (Dan, 15 min)
 - The Path to Lawyer Well-Being, The Well-Being Pledge, IWIL, Michigan Report, Taskforce Victories
- Priorities for our next meeting
 - Meeting poll to establish time availability
 - What are the taskforce priorities that we should focus on
 - Topics for our workgroups
- Adjourned (4:56pm)

New business

- Everyone establishing their idea of workgroups and what their focus should be based on what the charter is stating
- Respond to Meeting poll survey to establish next meetings
- Everyone considering task force priorities

Well-Being Taskforce Monthly Meeting Minutes May 6, 2024 Hosted on Zoom

Attendance: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Jenn Stuber, Anna Endter, Ghousia Rahim, Raquel Montoya-Lewis, Laura Moss. WSBA Staff Present: Adely Ruiz & Dan Crystal

Absent: Judge Michael Finkle

Final Meeting Minutes

- A motion to approve the minutes of meeting on March 28th, 2024 was made by Kyle Sciuchetti Emily Arneson motioned second
 - Darcel Lobo, Ana Endter, Justice Montoya-Lewis abstained as they were not present at last meeting
 - All other voting members approved
 - Confirmation of schedule for future meetings.
 - Consensus that meetings will occur first Monday of the month
 - Next meeting June 3rd
- Introductions. Those who could not attend the previous meeting can share why Attorney Well-Being is important to them. (Justice Montoya-Lewis, Darcel Lobo, Anna Endter, Jennifer Stuber)
- Kyra Hazilla, JD, LCSW Oregon Attorney Assistance Program (20 minutes)
 - Discussed Oregon's report included in reading materials this week.
 - Group formation occurred through recruiting all different types of attorneys in the state (firms, solos, bar affinities)
 - Alot of the recruitment was done through personal invitations
 - Task Force members had personal stories and connection to the well-being efforts
 - Due to sufficient resources in the Oregon-LAP program there was an opportunity to focus on other areas of the law that can improve lawyer well-being
 - o Q&A with members

- Size of workgroups
 - Established 4 work groups
 - Topics can be combined in order to make them manageable
- Structure of work groups
 - Assigned task force members as the core leaders
 - Recruiting volunteers to also help with the work
- How to work with Trauma that may show
 - Recommendation to read Trauma Stewardship by Laura Vandernoot Lipsky
- What happens beyond the report in order to ensure things are put into action
 - Continued establishing small groups that are continuing to review the work
- Workgroup discussion. Identification of topics, number of workgroups, and composition of workgroups. (Justin, 40 min)
 - Kevin Plachy clarified who Task Force members will submit their report (Board of Governers) to and limitations they have to enforce change that Task Force may recommend
 - Topics of consideration
 - Ethics and Wellness
 - Focus on Law students
 - Vicarious Trauma
 - Workplace well-being
 - Focusing on disparities experienced by people of color and LGBTQ community
 - Helping new lawyers' transition
 - DEI involvement intertwined in all the work
- Volunteer recruitment
 - Working with sections, eblast

Largest recruitment will occur through summit

- How to engage volunteers into the dialogue
- Justin Bingham adjourned meeting at 5:33pm

Well-Being Taskforce Monthly Meeting Minutes Monday June 6, 2024 Hosted on Zoom

Taskforce Members: Justin Bingham (Chair), Michael Finkle, Darcel Lobo, Emily Arneson, Ghousia Rahim, Melissa Berry, Susan Lee, Laura Moss, Raquel Montoya-Lewis

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Absent: Kyle Sciuchetti, Jenn Stuber, BOG Liaison Nam Nguyen

Guest speaker: Heidi Alexander

Quorum Bylaw "Quorum" means the presence of a majority of the voting membership. A quorum must be present when votes are taken. Quorum: 5 members

Minutes

- Summary of meeting Agenda.
- A motion to approve the minutes from May 6th, 2024, was made by Emily Arneson with the amendment to correct spelling of Emily's last name. Melissa Berry motioned 2nd all other voting members approved
 - Judge Michael Finkle and Susan Lee abstained due to their absence during May meeting
- Introduce new Law Student representative Susan Lee.
- BOG Liaison Nam Nguyen
 - Kevin Plachy spoke to Nam's experience and interest in the Wellbeing Taskforce
- Heidi Alexander, Director of Massachusetts SJC Standing Committee on Lawyer Well-Being
 - discussed the national lawyer well-being movement and IWIL's work, as well as Massachusetts process in drafting its report.
 - Offered an understanding that there is a need for resources staff and budget to move any recommendation made in the report forward
 - Provided information on evaluation methods
 - Discussed services that have been implemented as a result of their report
- Workgroup discussion. Feedback about workgroup preferences based upon these initial assignments.
 - Identification of workgroup chairs.
 - Discussed and asked for feedback on grouping of people and assigned workgroup topics that Justin created with WSBA staff liaisons and Kevin Plachy
 - Emily Arneson asked there be separate workgroup specifically looking at mental health

- Judge Michael Finkle offered their expertise in mental health and desire to participate
- Melissa Berry, Darcel Lobo asked for clarification on the role of the workgroups
 - Dan Crystal and Kevin Plachy provided clarification
- Justin Bingham discussed bringing on volunteers for workgroups
 - Melissa Berry discussed concern around logistics of meeting times and the structure of meetings moving forward if there will be inclusion of volunteers amongst the workgroups
- Laura Moss asked there be an invite in order to rally volunteers
- Adjourned at 5:40PM

New Business

- Members are to forward an email to Justin, Dan, and Adely confirming the following
 - o approval of their assignment in workgroups
 - Express interest if there is a desire to be appointed as the chair to the workgroup
 - Discuss outreach in options in order to rally up volunteers from the workgroup

Well-Being Taskforce Inaugural Meeting Minutes July 1st, 2024, 4:00pm- Hosted on Zoom

Attended: Justin Bingham (Chair), Michael Finkle, Darcel Lobo, Emily Arneson, Ghousia Rahim, Melissa Berry, Susan Lee, Laura Moss, Kyle Sciuchetti

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy,

Absent: Jenn Stuber, Raquel Montoya-Lewis, BOG Liaison Nam Nguyen

Minutes

- Summary of meeting agenda
- Motion to approve the June meetings minutes was made by Bushra Rahim. The motion was seconded by Darcel Lobo. The motion passed.
 - Kyle Sciuchetti requested the minutes be amended to correct the spelling of his last name.
 - Judge Finkle and Kyle Sciuchetti abstained due to their absence at the June meeting.
- Breakout Rooms for Workgroups (50 minutes)
 - Groups reported out the following:
 - 1) Meeting times for their respective work group
 - 2) Contributors that can assist with their workgroup
 - i. three WSBA contributors
 - ii. Useful experts in these domains to inform the conversation.
 - 3) Reflections on personal priorities as it pertains to the workgroups.
- Recommendations for work group process were made. WSBA staff has offered to assist the workgroups.
- Adjourn 5:30pm
- August 5th next meeting

Well-Being Taskforce Meeting Minutes August 5th , 2024, 4:00pm- Hosted on Zoom

Task Force members in attendance: Justin Bingham (Chair), Michael Finkle, Darcel Lobo, Emily Arneson, Ghousia Rahim, Melissa Berry, Susan Lee, Laura Moss, Kyle Sciuchetti,

Absent: Raquel Montoya- Lewis,

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy, BOG Liaison Nam Gyuen

Others: Dan Crystal, Kevin Plachy, Adely Ruiz, Aaron Paker, Philip Lentz, Melissa Jaffe, Annasara Purcell, Miriam Korngold, Selena Liu, Elaine McDaniel

Minutes

- Summary of meeting agenda provided by chair, Justin Bingham
- Motion to approve August meeting minutes
 - Kyle Sciuchetti motioned; Susan Lee motioned seconded the motion
 - Motion passed without opposition
- Ad hoc members were introduced. Roles of ad hoc members vs. taskforce members was discussed.
- Timelines for reports from Workgroups
 - Should be done by March 2025
- Workgroups held breakout sessions for 30 minutes and reported out their conversation to the full taskforce
- Workgroups report out items they would like to add to the survey
 - Substance use
 - Rural practice
 - Student loans/ finances
 - Experience in the law for minorities

Discussing the style of the survey

- o Should include qualitative and quantitative
- Adjourned at 5:31pm

Well-Being Taskforce Meeting Minutes September 9th , 2024, 4:00pm- Hosted on Zoom

Task Force members in attendance: Justin Bingham (Chair), Michael Finkle, Darcel Lobo, Emily Arneson, Susan Lee, Kyle Sciuchetti, Sara Smucker Barnwell, Laura Moss

Absent: Raquel Montoya- Lewis, Ghousia Rahim, Melissa Berry

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy, BOG Liaison Nam Nguyen

Others: Philip Lentz, Gerald Heppler, Annasara Purcell, Miriam Korngold, Aaron Paker, Melissa Jaffe

Minutes

- Welcome by Chair Justin Bingham
 - Sara Smucker Barnwell was introduced as the newest member of the Taskforce
 - Approval of last meeting's minutes
 - Kyle Sciuchetti moved to approve the minutes, Darcel Lobo seconded the motion
 - Motion passed without opposition
 - Justin asked members to review State Recommendations memo: research methods and recommendations from OR, CO, NY and MA.
 - Meant to provide a snapshot of the processes from other state taskforces, as well as their recommendations
 - Kevin Plachy reviewed Taskforce Timeline Memo: workgroups research, recommendations, and interim reports.
 - Dates and a timeline from the present until completion of the taskforce
- Breakout Rooms for Workgroups
 Each workgroup met for thirty minutes to discuss the items presented in the full taskforce session.
- Report out from breakout rooms:
 - Confirmed their next meeting outside of the ongoing Taskforce meetings
 - Discussed focal points for survey
 - Discussed internal progress and next steps

Adjourned 5:25pm

Well-Being Taskforce Monthly Meeting Minutes

October 14, 2024-4-5:30pm- Zoom link here Zoom phone#: (253) 215-8782 Meeting ID: 838 3145 4568 || Passcode: 758442 Website, SharePoint

Taskforce Members in attendance: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Raquel Montoya-Lewis, Laura Moss, Sara Smucker Barnwell

Absent: Raquel Montoya-Lewis BOG Liaison Allison Widney, Melissa Jaffe

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Others: Philip Lentz, Gerald Heppler, Annasara Purcell, Miriam Korngold, Aaron Paker

Minutes

- ♦ Welcome by chair Justin Bingham
 - Acknowledgment that this meeting is during Indigenous Peoples/Columbus Day.
 - Approval of September's meeting's minutes:
 - Emily Arneson moved to approve the minutes, Kyle Sciuchetti seconded the motion
 - Motion passed without opposition
 - Discuss status of survey questions from workgroups.

Breakout rooms focused on the following:

- What recommendations does the workgroup want to make towards the final report?
- Discussed working plan for completing the workgroup's interim report (due Dec 20th).

Report out from breakout rooms:

• Each workgroup reported their interim report timeline and asked clarifying questions and established expectations.

Adjourned 5:17pm

WASHINGTON STATE BAR ASSOCIATION Well-Being Taskforce Monthly Meeting Agenda

November 4, 2024-4-5:30pm- Zoom link here

Zoom phone#: (253) 215-8782 Meeting ID: 815 4476 4463 || Passcode: 720331

<u>Website</u>

Taskforce Members in attendance: Justin Bingham (Chair), Kyle Sciuchetti, Darcel Lobo, Melissa Berry, Emily Arneson, Susan Lee, Ghousia Rahim, Michael Finkle, Laura Moss

Absent: Raquel Montoya-Lewis, BOG Liaison Allison Widney, Melissa Jaffe, Gerald Heppler, Sara Smucker Barnwell

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Others: Philip Lentz, Annasara Purcell, Miriam Korngold, Justin Lo, Ryann Peyton, Marci Comeau, Aaron Paker

Minutes

Welcome by Chair Justin Bingham

- Approval of October's meeting minutes:
 - Kyle Sciuchetti moved to approve the minutes, Judge Finkle seconded the motion
 - Motion passed without opposition
- Justin Bingham reported taskforce members who will be attending the Oregon's <u>Wellness Summit</u> on 11/8
- Dan Crystal requested members provide Feedback for the WSBA Equity and Justice Plan
- Justin Bingham explained timeline of current workgroup and the transition to new workgroups in January
 - 1. Government and Legal Aid 2. Suicide and Addiction
- Justin Bingham provided current workgroups expectations and the purpose of their report due on December 20th
- Guest Speaker Ryann Peyton, director from the Colorado Attorney Mentoring Program, provided information on the mentoring program adopted in their state. The presentation included the process used to create the program, as well as principles/values that guide the program currently.
- Breakout Rooms focused on the following:
 - o timeline for deliverables
 - o Discussed research and recommendations for the report
 - o Assigning writing roles to members
- Each workgroup reported the status of their interim report and their timeline for completion
 - Survey workgroup asked for feedback on the questions that should be included on the survey

Well-Being Taskforce Monthly Meeting Minutes December 2, 2024-4-5:30pm- Zoom link here

Zoom phone#: (253) 215-8782 Meeting ID: 824 4373 0929 || Passcode: 556585 Website, SharePoint

Taskforce Members in attendance: Justin Bingham (Chair), Kyle Sciuchetti, Melissa Berry, Emily Arneson, Susan Lee, Sara Smucker Barnwell, Laura Moss

Absent: Michael Finkle, Raquel Montoya-Lewis, Darcel Lobo, Ghousia Rahim

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy, BOG Liaison: Allison Widney.

Others: Matt Thiese, Phillip L, Gerald Heppler, Annasara Purcell, Melissa Jaffe

Agenda

Welcome. (Justin, 10-15 minutes)

- Approval of Novembers meeting's minutes
 - Kyle Sciuchetti moved to approve the minutes, Melissa Berry seconded the motion
 - Motion passed without opposition
- Kyle Sciuchetti, Melissa Berry and Justin Bingham reported out their experience at the Oregon Wellness summit
- Justin Bingham reported change of date for January's taskforce meeting from 1/6/25 to 1/13/25 at 4pm
- o Justin Introduced BOG liaison Alison Widney
 - Alison discussed their role and desire to assist the taskforce where they see fit
- o Justin Bingham reported next workgroup focal points
 - Government and Legal Aid
 - Suicide and Addiction
 - Dan Crystal and Justin Bingham asked taskforce members to consider what group they would like to be assigned and to report their decision via email
- Emily Arneson discussed the value of the feedback provided to the survey group and next steps
 - Survey draft will be complete by 12/3 and will then be provided to taskforce chair Justin Bingham
 - Emily has offered to chat with any members on any decisions that were made for the survey
- o Dan Crystal set agenda for Workgroups report writing
 - Considering 5 pages
 - Bulleting some locations as needed
- Breakout Rooms focused on the following:

- Reviewed timeline for deliverables
- Discuss research and recommendations for the report
- Assigned writing roles to members for each section
- Each workgroup reported the status of their interim report and their timeline for completion

Adjourned 5:25pm

Well-Being Taskforce Monthly Meeting Minutes January 13th, 2024-4-5:30pm- Zoom link here

Zoom phone#: (253) 215-8782 Meeting ID: 824 4373 0929 || Passcode: 556585 Website, SharePoint

Taskforce Members in attendance: Justin Bingham (Chair), Melissa Berry, Emily Arneson, Susan Lee, Sara Smucker Barnwell, Laura Moss, Michael Finkle, Darcel Lobo, Ghousia Rahim, Kyle Sciuchetti

Absent: Raquel Montoya-Lewis BOG Liaison: Allison Widney

WSBA Staff: Adely Ruiz, Dan Crystal

Others: Justin Lo, Annsara Purcell

Agenda

Welcome. (Justin, 20 minutes)

- Approval of Decembers meeting's minutes
 - Susan Lee moved to approve the minutes, Emily Arneson seconded the motion
 - Motion passed without opposition
- Emily Arneson reported out updates on the member survey
 - expected to be open for three weeks beginning January 27th
 - taskforce members were asked to test out the survey (deadline 1/17)
- Justin Bingham updated Student, Privative Practice and Survey workgroups on their completion of a final report once survey results are received and assessed.
 - workgroups are currently on hiatus
- Justin Bingham and Dan Crystal spoke about the next two workgroups: 1. Government and Legal Aid 2. Suicide and Addiction
 - Justin Reported out each workgroup's first priorities are to assign Ad-Hocs and create a meeting schedule
 - Dan Crystal reported out which workgroup each taskforce member was assigned to and the reason for their assignment

Breakout Rooms discussed the following: (45 minutes)

- Their individual priorities as they relate to the workgroups
- o discussion of state reports relevant to each workgroup
- $\circ~$ Scheduling a time to meet outside of the Taskforce meeting
- A review of timeline for deliverables
- Each workgroup reported out their progress towards getting

acclimated to the topic and their next meeting date and/or their goals to establish a meeting date

Adjourned 5:28pm

Well-Being Taskforce Monthly Meeting Minutes February 3, 2025-4-5:30pm- Zoom link here Website, SharePoint

Taskforce Members in attendance: Justin Bingham (Chair), Melissa Berry, Emily Arneson, Susan Lee, Laura Moss, Darcel Lobo, Ghousia Rahim

Absent: Raquel Montoya-Lewis BOG Liaison: Allison Widney, Kyle Sciuchetti, Sara Smucker Barnwell, Michael Finkle

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy

Others: Annsara Purcell, Marci Comeau, Marlene Otero, Jennifer Stuber, Aaron Paker

Agenda

Welcome. (Justin 10 min)

- Approval of last meeting's minutes
 - Emily Arneson moved to approve the minutes, Melissa Berry seconded the motion
 - Motion passed without opposition
- Introduction of Ad Hoc members.
 - Annasara Purcell, Aaron Paker, Marlene Otero, Marci
 Comeau and Dr. Jenn Stuber were introduced as Ad
 Hoc members. Each spoke to their expertise, as well as
 what motivated them to participate with the taskforce.

Breakout Rooms for Workgroups met for forty minutes, and discussed the following:

- Confirmed a meeting schedule
- Created a timeline for surveys (if applicable), and discussed possibility of speakers they may want to hear from, and the importance of sticking to the timeline for report writing.

Workgroups reported out the following (10minutes)

- Discussed themes/ issues they want to address in their report
- Reported deliverables such as creating a focus group and or survey
- Mentioned potential speakers they would like to invite to the

taskforce in order to stimulate ideas for future recommendations

Adjourned 5:30pm

Well-Being Taskforce Monthly Meeting Minutes March 3, 2025-4-5:30pm- Zoom link here

Website, SharePoint

Taskforce Members in attendance: Justin Bingham (Chair), Emily Arneson, Ghousia Rahim, Kyle Sciuchetti, Sara Smucker Barnwell, Michael Finkle

Absent: Melissa Berry, Susan Lee, Raquel Montoya-Lewis, Laura Moss, Darcel Lobo

WSBA Staff: Adely Ruiz, Dan Crystal, Kevin Plachy, BOG Liaison: Allison Widney

Others: Marci Comeau, Marlene Otero, Jennifer Stuber, Leslie Hagin, Matt Thiese

Agenda

Welcome. (Justin)

- o Approval of February meeting's minutes
 - □ Sara Smucker Barnwell moved to approve February minutes, Emily Arneson seconded the motion
 - Motion passed without opposition
- Survey updates
 - Emily Arneson spoke to survey results
 - 903 response/ 9% response rate total
 - Age range of replies
 - Matt Thiese reported on his team's efforts towards analyzing the survey results
 - Matt requested taskforce members send their requests regarding what they would like analyzed from the survey results
- \circ $\,$ Time frame for workgroups
 - New Member/Law student, Survey, and Private practice workgroups will reconvene in June
 - Once survey results are analyzed a final report will be required from each workgroup
 - Current workgroups are set to run through the end of May
 - Tentative update to chair is due at end of March regarding the work they have completed so far
 - Workgroup members are being asked to focus on this request
 - Kevin Plachy asked workgroups to avoid duplicating questions in their surveys with questions included in the previous membership survey

- Guest Speaker: Leslie Hagin from Washington Lawyers Assisting Lawyers spoke about her nonprofit organization, attorney difficulties, and the value in providing attorney peer support.
- Workgroups met in breakout rooms for 30 minutes to discuss the following:
 - $\hfill\square$ Scheduling next meeting
 - □ Creating a timeline for disseminating their surveys
 - Report Writing
- Taskforce members reconvened and reported out their timeline deliverables
- Multiple members discussed wellbeing issues currently facing government workers. Emily Arneson suggested job security should be addressed in the government legal aid workgroup.

Adjourned 5:30pm

The Private Practice Working Group submits this interim report and recommendations to the WSBA Board of Governors. This interim report will detail the work performed by the working group to date and describe recommendations for well-being initiatives the group has formed based on its work and findings. These recommendations may be revised based on the results of the survey on member well-being that the Task Force is distributing in early 2025.

The Private Practice Working Group is comprised of members in working solo practice, small-firms, and large-firms in addition to two practicing therapists who work frequently with attorneys. To date the working group has focused its activity in three main areas: (1) proposing questions to the survey working group to be included in the well-being survey sent to WSBA members, (2) conducting a separate survey of attendees of the Solo/Small Practice conference to garner more detailed feedback from solo/small practice practitioners, and (3) evaluating the well-being strategies and proposals put forth by other states' task forces with regards to attorneys working in private practice, and seeking feedback from practitioners in other states as to the efficacy of such programs.

The working group will not review in detail our questions submitted to the survey group here, as those questions have already been included with the draft survey. This report will instead focus on the results of our survey of solo and small practice practitioners and our recommendations for WSBA to improve the well-being of attorneys in private practice. All recommendations made here are based on the results of our survey as well as analysis of what other states have done and the results obtained in other states.

I. <u>Survey Results</u>

We prepared and distributed a seven-question survey to attendees of the Solo/Small Practice conference on September 27, 2024 (copy attached) and received twenty-six responses. The purpose of this survey was to get more nuanced data on the well-being challenges of lawyers working in Solo/Small Practices than would be possible through the anticipated broader wellbeing survey. The survey contained a mix of multiple choice, ranking, and free-form response questions. The working group has not included visuals in this draft report of the data breakdowns and has instead described them, but with the final report suggests that visuals such as pie charts be included to describe survey results.

A. Biggest Barriers to Well-Being

In response to a free-form question asking about the biggest challenge to attorney wellbeing, two categories of responses dominated: the stress of management and the emotional difficulty of isolation. Fifty percent of respondents reported that one of their biggest challenges to maintaining their well-being has something to do with management, whether it is managing time, managing business and budget, wearing too many hats, or management and supervision of the staff. Thirty-one percent responded with some variation of isolation or loneliness, ranging from a general lack of others around to having no one to bounce ideas off. Other responses included such things as feeling like they cannot take vacations, taking on too much work, the lack of a guaranteed or steady income, and the need to know everything because no one else is there provide guidance or another opinion.

Those in the working group who work in solo or small practices were not surprised to see that isolation and management issues were at the top of the list. When the salaries of the entire staff fall on a small number of attorneys, there is pressure to spend more time chasing the next payment and less time interacting with others. That workload also makes day-today monitoring of staff productivity, product orders, and marketing feel like one more crushing demand.

B. Factors Supporting Well-Being

With regards to what aspects of solo/small practice enhance one's well-being, 100% of responses identified some variation of freedom as the most important thing. Respondents noted the ability to set their own schedules, not having a boss, ability to pick and choose cases that they want or don't want, and deciding for themselves how much revenue and/or billable hours to aim for each week. Once again, this was no surprise to our group.

C. WSBA Resources Utilized

When asked about WSBA resources used, seventy-three percent of respondents reported having utilized CLEs. Nineteen percent reported having using peer advising, and the same number reported having never used a WSBA resource at all. Few had ever used referrals or mental health consultations, and none had participated in online support groups. Only a small number of our group have participated in the online support groups. We were not surprised that so few had utilized these resources given the perceived risk of stigma associated with seeking help.

D. Additional Resources or Changes Desired

One survey question asked respondents what additional resources would be helpful to them if offered through WSBA. The responses were as follows:

- Fifty-three percent of respondents thought that partnerships with gyms or other wellness service providers would be beneficial.
- Forty-two percent thought that a published list of professionals (therapists, counselors, life coaches, etc.) that could be accessed without requirement to log-in or make a request would be a helpful resource.
- Forty-two percent also thought it would help to have access to a publication filled with anonymous or signed "stories from the trenches" with attorneys sharing their struggles and their successes regarding well-being challenges.
- Thirty-one percent thought that offering more CLEs would help, with some respondents specifically asking that well-being CLEs be mandatory or be made part of the plenary session at more events to reduce any stigma associated with attending them.

Finally, the respondents were asked about changes to rule, court, or institutional changes that might improve overall well-being. Thirty-four percent either did not think the question applied to them or did not think any changes would help. Thirty-eight percent thought that more consistent consequences for bad/toxic behavior in and out of the courtroom (depositions, negotiations, etc.) would improve well-being. Forty-six percent felt that standardized court rules, including earlier filing deadlines, across the state would be beneficial. In our discussion a similar standardization for other state or county requirements, such as deed recording, were brought up as well.

E. Common Themes and Conclusions

A review of the above results supports two broad conclusions about the state of wellbeing among solo/small practice lawyers, all of which informed the recommendations in the next section. First, although mental health and well-being are becoming more commonly talked about than they were years ago, the fear of stigma or reprisal for seeking help in this area remains far too common. Lawyers remain afraid to make traceable requests for help, to seek out resources that require a login, or to attend optional CLEs on well-being topics for fear of what others will think. While we must continue to work towards eradicating this stigma, we also should work to make resources available in an anonymous way for those who continue to fear it.

Second, when it comes to supporting the well-being of solo/small practice lawyers, resources that foster connection and community do enhance well-being through reducing isolation, even if such programs are not explicitly "well-being focused." Because isolation is such a significant barrier to well-being, any WSBA program that creates community and connection can also contribute to well-being. These conclusions are reflected in the recommendations made in Section II.

II. <u>Recommendations</u>

The private practice working group recommends that WSBA invest in the following resources to enhance the well-being of members working in private practice.

A. Make more CLEs focused on well-being available and make one such CLE per year mandatory.

Through well-being-focused CLEs, law firms and the WSBA can equip attorneys with the tools and knowledge they need to maintain their mental health and resilience in the face a high-stress career. These CLEs could cover topics such as stress management, mindfulness, burnout prevention, and work-life balance. While there has been an increase in the number of CLEs focused on well-being in the past few years, such offerings remain sporadic and discretionary.

Requiring at least one well-being CLE per year would help reduce the stigma surrounding mental health in the legal profession. Attorneys often fear that seeking help or attending well-being related programs might reflect negatively on their capabilities or professionalism. By making well-being CLEs mandatory, it signals to the profession that maintaining mental health is just as important as improving legal skills. This shift in culture can encourage more attorneys to proactively seek support when needed, rather than suffering in silence due to concerns about their reputation or career prospects. Such a policy would normalize the importance of mental well-being and of having open conversations about this topic, leading to more open conversations and a greater willingness to seek help without fear of judgment.

B. Publish more "stories from the trenches."

One of the most requested well-being resources in the solo/small practice survey was access to more "stories from the trenches." The idea is that members can publish anonymous or signed stories of their struggles and/or successes related to their well-being as practicing members of the legal community. Such stories could focus on mental health, physical health, stress management, self-advocacy as a member of an underrepresented group, or other topics

critical to member well-being. Reading these stories will allow struggling members to recognize that they are not alone and that there are others who have come out the other side. Writing the stories allows authors to give voice to their struggles or share their victories and take a concrete step towards helping themselves and others.

Stories could be made available in a variety of ways including links from the WSBA website, a dedicated section in each Bar News, or a separate volume published with the Bar News a couple times per year. The more different forums in which such stories are available, the more normalized talking about well-being struggles will become.

C. Make well-being resources available without a login.

Searching for professionals for help with mental health challenges, addiction, marital issues, or any number of other challenges that come from the stress of working in law can be daunting. Many members prefer to work with someone who has experience working with lawyers but are unsure of where to look for such professionals. Unfortunately, the fear of stigma remains strong enough for many members that they will not take any actions that could possibly put the bar on notice of any potential struggle they are having, which means they will not reach out to the wellness program managers or even access resources that require a personalized login. For that reason, the working group recommends creating another highly requested resource from our survey results: a list of resources, specifically wellness professionals, that can be accessed by members without the need to log into the WSBA website or contact the wellness program managers directly. Such a list could be published in the Bar News once or twice a year, or constantly available through the wellness program managers already internally maintain aspects of such a list currently to be able to provide referrals, so the main work associated with this proposal would simply be putting this into a form suitable for publishing.

D. Create programs to build community and support for Small/Solo Practices.

As we saw in the results of our survey of solos and small firm practitioners, they often face unique challenges, including a sense of isolation due to working independently without the support system that comes with larger firms. Creating programs that foster community among these lawyers can provide a vital source of support, both professionally and personally.

- i. <u>Small Group Coaching</u>. Small group coaching opportunities could offer solos a chance to connect with peers and experienced mentors who understand the specific struggles they face. These coaching groups could focus on practice management, client relations, or personal development, giving solo lawyers the tools they need to thrive. The collaborative environment would also encourage knowledge sharing, helping attorneys overcome common hurdles while building lasting relationships with others in similar situations.
- ii. <u>Local Bar Association Events</u>. Local bar association events can be a key component of creating a sense of community among solo practitioners. These events can provide a platform for networking, learning, and forming connections with other legal professionals in the area. By WSBA partnering with local bar associations, solos can gain access to educational opportunities and social gatherings that allow them to build relationships, share experiences, and stay informed about developments in the legal field. Such events would also create a more inclusive atmosphere where solos feel

they are part of a larger legal community, rather than being disconnected or isolated in their own practice.

iii. <u>Offering Discounts Through WSBA</u>. Offering WSBA-related discounts for solos can further support their professional and personal growth. While WSBA currently offers discounts on practice management software which helps ease some of the financial burdens associated with running a solo practice, it would also be beneficial to WSBA members if WSBA offers discounts with other services which supported members' well-being. This could include gym memberships, counseling services, and nutrition services, just to name a few. Creating these types of discounts would help solos feel more supported in both their personal and professional journey.

E. Develop a mentorship program for new attorneys.

Mentoring is another proven way to foster connection and community and mitigate the feeling of isolation and loneliness that is pervasive in the profession. Like the programming outlined above, strong mentoring relationships can serve as a vital source of professional and personal support. A mentoring program offers both an immediate tool and part of a long-term systemic solution to promote member well-being, professional development, and competence.

New lawyers in Washington have variable access and consistency to mentors early in their career when it is most essential to their professional identity formation. The WSBA does not offer a formal mentorship program. It does offer MentorLink Mixers, but those are meant to be a one-time meeting based on a specific topic and do not serve the same purposes as a formal mentoring program. Several affinity bar associations have optional formal mentoring programs for law students or new lawyers; almost all are in King County. A review of the list maintained on the WSBA site reveals most are informal opportunities rather than structured programs that pair new lawyers with an experienced lawyer. While the state's largest legal employers typically have internal mentor programs, they usually pair new attorneys with junior lawyers and are concentrated in Seattle. Many organizations continue to rely on informal mentoring; however, lawyers from underrepresented backgrounds, like first-generation lawyers, historically have not had the same access to mentors. This is particularly concerning as the profession moves away from the apprenticeship model.

By developing a formal mentor program for new lawyers, the WSBA would fill the gap in access to mentors and offer a consistent experience and connection point for all new members of the bar. The WSBA has already done some of the work in developing a <u>Mentoring Program</u> <u>Toolkit</u> and offering CLE credit for a <u>Self-Directed Structured Mentoring Program</u>. Yet these resources do not address the fundamental issue of how a new lawyers who are not working at a large organization with an internal program might find a mentor.

The working group recommends that the WSBA take mentoring to the next level in Washington by offering its own formal mentoring program for new lawyers to foster connection and competence along with a smooth transition to practice. Drawing on the experience of the success of other state bar associations that have implemented this type of program, the WSBA's program should:

- Be required for all newly admitted lawyers with less than three years of experience
- Last 12-18 months

- Offer CLE credit to the newly admitted lawyers and the mentors
- Pair newly admitted attorneys with attorneys having at least five years of experience
- Require a uniform mentoring curriculum for all and an individualized mentoring plan
- Provide mentor training to ensure the mentors have adequate support and resources; consider offering the Mental Health First Aid program for mentors
- Infuse well-being as part of practice readiness and a sustainable practice
- Provide group mentoring opportunities in addition to one-to-one mentoring

The WSBA should think creatively about how to leverage the best aspects of the growing list of state bar mentoring programs, starting with the following:

- <u>Colorado Attorney Mentoring Program (CAMP) of Colorado Supreme Court</u>
- <u>State Bar of Georgia Transition into Law Practice Program</u>
- <u>Illinois State Bar Association Lawyer to Lawyer Mentoring Program</u>
- <u>Oregon State Bar New Lawyer Mentoring Program</u>
- <u>Utah State Bar New Lawyer Training Program</u>

F. Implement a Well-Being Pledge with resourcing from WSBA.

Employer policies and practices are a key driver of well-being outcomes for attorneys working in private practice. Employers that promote self-care, foster cultures of kindness and tolerance, and allow attorneys reasonable time and flexibility for non-work commitments cultivate well-being among employees. Unfortunately, too many legal employers continue to drive employee burnout by maintaining inflexible schedules, fostering cultures of criticism and competition, and declining to invest in well-being resources for employees. The culture around attorney well-being is unlikely to change unless legal employers play an active role in promoting and cultivating well-being.

Some nationwide programs have attempted to promote employer change through wellbeing pledges, but many of these programs do not offer support for employers in making positive changes or create any accountability for employers who take a well-being pledge. In addition, a one-size-fits-all approach to well-being pledges is likely to make such pledges inaccessible to small employers, as small firms attempting to improve employee well-being are likely to have less resources to invest.

The State of Colorado, however, offers a well-being recognition program for legal employers that provides participants with meaningful guidance on how to improve employee well-being, and with resources to help employers implement desired changes. Key features of this program supporting its efficacy include:

- i. **Resources**: The program is supported by full-time staff employed by the Colorado Supreme Court. At least one full-time-employee is dedicated to the task of helping legal employers identify and implement changes that will improve their employees' well-being. The availability of subject matter experts to help employers create bespoke plans makes participation accessible to employers of all sizes and helps employers prioritize goals.
- ii. **Community**: Program staff not only work directly with employers but also create opportunities for employers to come together and share best practices. Learning

about other legal employers' experiences helps employers gain confidence about implementing changes themselves.

- iii. Flexibility: The program categorizes potential changes or commitments as either easy, medium, or challenging across six different facets of promoting well-being. Employers can pick which policies or resources they want to focus on in a given year. This allows employers to create bespoke programs rather than adopting a one-size-fits all approach.
- iv. **Continuous Improvement**: The program encourages employers to make changes that can build on one another year after year so that participants are always moving forward towards increased well-being, but in increments and at a pace that are manageable for each specific employer. In contrast to some other pledge programs that simply ask employers to commit to the same set of practices year after year, this approach emphasizes incremental change and consistent improvement.
- v. Accountability: Employers submit reports to the program each year explaining how they have lived up to their pledge commitments. Employers that do substantially live up to their commitments are recognized by the Colorado Supreme Court and receive a badge to display on their website and other marketing materials.

The working group recommends that Washington State implement a program modelled after Colorado's program and featuring many of these same features. Such a program will support legal employers in enabling greater levels of attorney well-being.

The private practice working group looks forward to receiving the results of the member survey, analyzing how such results map onto our current recommendations, and submitting a final draft of our recommendations at that time.

Law School / New Member Workgroup – Final Report December 5, 2024

Work Plan Overview

The Law School / New Member Workgroup has been actively developing recommendations to enhance well-being among law students and new members of the Washington State Bar Association (WSBA). The workgroup's approach incorporates a thorough review of existing research, new data collection via targeted outreach, and the formulation of actionable recommendations.

Workgroup Members

Justice Raquel Montoya-Louis, Washington State Supreme Court Susan Lee, Ph.D., Assistant Dean of Students, Gonzaga Law Adely Ruiz, Liaison, Washington State Bar Association (WSBA) Bushra Rahim, Attorney Gerald Heppler, Assistant Dean of Admission, Seattle University School of Law Phillip Lentz, Clinical Psychologist, University of Washington School of Law

Timeline and Approach

The Law School / New member Workgroup began with the assignment of Susan Lee, Assistant Dean of Students, as their chair. We included Bushra Rahim, Attorney, and Justice Montoya-Lewis as participating members with the assistance of WSBA liaison, Adely Ruiz. During their first meeting on July 1st, 2024, the group identified two ad hoc members Gerald Heppler, Assistant Dean of Admission at Seattle University School of Law, and Phillip Lentz, the Clinical Psychologist at University of Washington School of Law. The two ad hoc members joined the group on August 5th, 2024.

Literature Review

The workgroup's efforts began with a focus on the task force charter's first objective: a well-being survey targeting law students and new members. Initial work included analyzing various sources, including:

- Survey of Law Student Well-Being (American Bar Association): Insights on mental health challenges like stress, substance abuse, and burnout among law students.
- Wellness & Wellbeing Initiative (University of Minnesota Law School): A student-led program promoting wellness through mentorship, events, and feedback.
- It Is Okay to Not Be Okay: The 2021 Survey of Law Student Well-Being: Highlights of mental health struggles faced by law students.

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- The Phantom Menace to Professional Identity Formation and Law School Success: Imposter Syndrome: A study on imposter syndrome's effect on law students' development.
- A Brighter Future for Law Student Well-Being? Trends and initiatives for enhancing well-being in legal education.
- Additional insights and reporting from Gonzaga University, Seattle University, and the University of Washington.

Survey Development Process and Distribution

The workgroup explored the idea of a focus group before deciding on a survey format. Key topics of discussion included common stressors for law students and practitioners. Using a combination of literature reviews and survey analysis from other law schools, the group laid the groundwork for its own survey design.

Survey Development Process

- 1. **Question Development**: Each workgroup member proposed questions, which were collectively reviewed, refined, and finalized.
- 2. **Distribution**: The survey was administered through Microsoft Teams to law students at Gonzaga, Seattle University, and the University of Washington, as well as new graduates, practitioners, and the broader WSBA community.
- 3. **Response**: The survey remained open for seven days, yielding 24 anonymous responses.
- 4. **Analysis**: Responses were discussed to inform recommendations for a larger survey to WSBA members.

Survey Distribution

A link to the mini survey was shared with key stakeholders and specific individuals within our target demographic. Specifically, the survey went to law students from Gonzaga Law, Seattle University School of Law, University of Washington School of Law. The survey was also distributed to new practitioners within the broader WSBA community. We received 24 responses.

Survey Questions and Purpose

The survey aimed to identify key wellness challenges and opportunities in the legal field. Each question's rationale and purpose were discussed at length among workgroup members:

- 1. What does wellness mean to you?
 - **Purpose**: To establish a baseline understanding of how participants perceive wellness.
- 2. Do the available wellness services seem approachable? Why or why not?
 - **Purpose**: To evaluate accessibility and stigma surrounding existing wellness and mental health services.
- 3. Are there barriers preventing you from using wellness services?

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- **Purpose**: To identify obstacles, including work/office culture, billable hours demand precluding regular use of wellness services, and systemic expectations.
- 4. Has utilizing wellness services improved your performance as a student or practitioner? How?
 - **Purpose**: To determine if wellness services have a measurable impact on performance and resilience.
- 5. How could the legal field better embrace your definition of wellness?
 - **Purpose**: To explore cultural and structural changes that could enhance well-being by expanding traditional definitions of wellness.

Recommendations

The workgroup developed a four-stage progression to integrate mental health and wellness into the legal field:

1. General Support

Models of support could include:

- Psychoeducation presentations on stress, anxiety, depression, substance use, suicidality, addiction, interpersonal effectiveness, empathy, community building, boundary setting, motivation and focus, sleep and diet hygiene.
- Identifying a calendar of events that correspond with specific industry trends/routine to coordinate the presentations as they correspond to current needs.
- Gradual development of mental health support packages that match industry trends/patterns within needs we identify, for individuals to take home and use to implement therapeutic interventions on their own.

2. Fostering Connection to Resources

In addition to the general presentations and aid packages, a committee could:

- Spend time exploring, documenting, and providing legal professionals with helpful resources, both within and outside the community, to help develop and manage their well-being as a legal professional.
- This expansion should also provide insight into legal culture and experience that could be helpful as a bridge of communication to the decision makers in the industry.

3. Supportive Community Building

In addition to presentation and resource management, a committee could explore:

- Intentional collaboration in programming within the legal field (heavy handed community building),
- Seeking external experts for presentations (including high achieved legal professionals, substance use consults, organizational psychologists from

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competitive environments), and further developing well-being programming within the legal field (including peer support groups, yoga, allyship).

This is most likely the stage that would most differentiate us from the rest of the • country on how well we support our legal professional within the scope of wellbeing.

4. Culture Change

The development of the first three stages would hopefully strengthen a buy-in process on the importance of taking care of our legal professionals are human beings first, allowing the industry to at least acknowledge that moving toward wholistic care of the legal professional allows for a more sustainable legal field.

The application of the foundational development of the other stages would directly impact the culture the legal field, including myth busting, establishing resilience/growth models within systems, interpersonal mediation, and crisis prevention.

Additional Recommendations:

- Wellness Curriculum:
 - A mandatory wellness course offered at the start of law school and annually thereafter for law students.
- Wellness CLEs:
 - Increased Legal Education (CLE) credits to support practitioners' well-being.

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<u>Member Wellbeing</u> <u>Survey Workgroup</u> <u>Final Survey</u> <u>Questions</u>

- 1) What is your age group?
 - a) <25
 - b) 25-29
 - c) 30-34
 - d) 35-39
 - e) 40-44
 - f) 45-49 g) 50-54
 - y) 50-54 h) 55-59
 - i) 60-64
 - i) 65-69
 - k) 70+
- 2) What is your gender identity?
 - a) Female
 - b) Male
 - c) Transgender
 - d) Non-Binary / Non-Conforming
 - e) Other (please specify)
 - f) Prefer not to disclose
- 3) What is your race/ethnicity? Select all that apply:
 - a) American Indian/Native American/Alaskan Native
 - b) Asian-Central Asian
 - c) Asian-East Asian
 - d) Asian-South Asian
 - e) Asian-Southeast Asian
 - f) Asian-Unspecified
 - g) Black/African American/African Descent
 - h) Hispanic/Latinx
 - i) Middle Eastern Descent
 - j) Multi-Racial/Bi-Racial
 - k) Pacific Islander/Native Hawaiian
 - I) White/European Descent
 - m) Other (please specify)
 - n) Prefer not to disclose
- 4) What is your relationship status?
 - a) Married
 - b) Not married, but in a committed relationship
 - c) Single
 - d) Divorced
 - e) Widowed
 - f) Other (please specify)_____
 - g) Prefer not to disclose

- 5) Do you have caregiving responsibilities on a regular basis for one or more minor children, dependent adults, or aging parents?
 - a) Yes
 - b) No
- 6) Sexual Orientation (choose all that apply):
 - a) Straight (heterosexual)
 - b) Gay
 - c) Lesbian
 - d) Other [If chosen a window will open with the following choices]
 - i) Asexual
 - ii) Bisexual
 - iii) Pansexual
 - iv) Queer
 - v) questioning or unsure
 - vi) same-gender loving
 - vii) an identity not listed: please specify _____
 - e) Prefer not to disclose
- 7) In what county is your *primary* practice?
 - a) King, Pierce, Snohomish, Spokane, or Clark
 - b) Thurston, Kitsap, Yakima, Whatcom, or Benton
 - c) Skagit, Cowlitz, Grant, Franklin, Lewis, Island, Chelan, Clallam, Grays Harbor, Mason, or Walla Walla
 - d) Stevens, Whitman, Kittitas, Douglas, Okanogan, Jefferson, Pacific, Klickitat, Asotin, Adams, San Juan, Pend Oreille, Skamania, Lincoln, Ferry, Wahkiakum, Columbia, or Garfield
 - e) Other, including outside of Washington State
- 8) How many years have you been practicing law?
 - a) Less than 1
 - b) 1 to 5 years
 - c) 6 to 10 years
 - d) 11 to 20 years
 - e) 21 to 30 years
 - f) 31 to 40 years
 - g) More than 40 years
- 9) Which of the following is your WSBA license type?
 - a) Judicial [route to question 10]
 - b) Attorney (including Active, Honorary, Inactive, and Pro Bono) [route to question 12]
 - c) Limited License Legal Technician (LLLT) (including Active, Inactive, and Pro Bono) [route to question 12]

- d) Limited Practice Officer (LPO) (including Active and Inactive) [route to question 12]
- 10) *[If judicial license type]* Rounded to the nearest whole number, how many years have you sat on the bench? ______ years
- 11) [If judicial license type] Which setting best describes your current judicial position?
 - a) Appellate Court (any level)
 - b) Superior, District, or Municipal Court
 - c) Juvenile Court
 - d) Tribal Court
 - e) Administrative Law Judge
 - f) Magistrate Judge
 - g) Other, please specify: _____

12) *[If license type other than judicial]* Which of the following best describes your *primary* area of practice?

- a) Litigation (civil)
- b) Litigation (criminal)
- c) Transactional (e.g., business, real property, contracts)
- d) Family Law
- e) Administrative, Government or Regulatory
- f) Other, please explain _____

13) Which of the following best describes the organization where you currently work?

- a) Private Practice: Solo
- b) Private Practice: 2 to 5 practitioners
- c) Private Practice: 6 to 15 practitioners
- d) Private Practice: 16 to 35 practitioners
- e) Private Practice: 36 to 75 practitioners
- f) Private Practice: More than 75 practitioners
- g) Judicial Chambers (e.g., hearing officer, law clerk)
- h) Government, public service, or non-profit
- i) In-House (corporate or for-profit)
- j) Law School (professor or administration)
- k) Bar administration or lawyer assistance
- I) Other, please specify:
- 14) In the past month, how many hours did you work in an average week? Include billable and non-billable time.
 - a) Less than 30
 - b) 30-34
 - c) 35-39
 - d) 40-44

- e) 45-49
- f) 50-59
- g) 60-69
- h) 70-79
- i) 80-89
- j) 90-99
- k) 100 or more

15) How many *billable* hours do you work on average per week?

- a) Less than 20
- b) 21 to 30
- c) 31 to 40
- d) 41 to 50
- e) More than 50
- f) I do not track billable hours.

16) Does your employer have a minimum billable hour expectation?

- a) Yes
- b) No

[If yes] What is the billable hour expectation?

- i) Less than 1500 hours per year
- ii) 1501 1750 hours per year
- iii) 1751 1850 hours per year
- iv) 1851 2000 hours per year
- v) 2001 2200 hours per year
- vi) Other, please specify:

[If yes] How often do billable hour expectations cause you stress?

- vii) Every day or nearly every day
- viii)Regularly
- ix) Occasionally
- x) Rarely
- xi) Never

17) How often do you feel burned out from your work?

- a) Every day or nearly every day
- b) Regularly
- c) Occasionally
- d) Rarely
- e) Never
- 18) How often does your employer (or clients if in solo practice) expect you to be available outside of work hours?

- a) Never
- b) Occasionally
- c) Regularly
- d) Always
- 19) Have you ever considered leaving the legal profession due to stress, burnout, or mental health issues?
 - a) Yes
 - b) No
 - c) Maybe

20) How often do you feel stressed by your financial situation?

- a) Every day or nearly every day
- b) Regularly
- c) Occasionally
- d) Rarely
- e) Never

21) Have financial concerns ever caused you to consider leaving the legal profession?

- a) Yes
- b) No
- c) Maybe

22) Did you graduate law school with student loan debt?

- a) Yes
- b) No
- c) Did not attend law school

[If yes] How much debt did you have upon graduation?

- i) Less than \$20,000
- ii) \$20,001 to \$50,000
- iii) \$50,001 to \$100,000
- iv) \$100,001 to \$150,000
- v) more than \$150,000
- vi) Prefer not to disclose

[If yes] To what extent has student loan debt negatively affected your mental wellbeing?

vii) Not at allviii)Somewhatix) Significantly

[If yes] Have you ever wanted to make a job or career change, but did not because of your student loan debt?

- x) Yes
- xi) No
- xii) Maybe
- 23) During the past 7 days, how many days did you engage in physical activity for at least 20 minutes?
 - a) 0 days
 - b) 1 day
 - c) 2 days
 - d) 3 days
 - e) 4 days
 - f) 5 days
 - g) 6 days
 - h) 7 days

24) How many hours of sleep do you get on an average night?

- a) Less than 4
- b) About 4
- c) About 5
- d) About 6
- e) About 7
- f) About 8
- g) More than 8

25) How often do you wake up feeling rested and restored?

- a) Never
- b) Rarely
- c) Sometimes
- d) Regularly
- e) Always
- 26) Which of the following activities do you do to support your mental health and wellbeing? Check all that apply.
 - a) Meditation
 - b) Therapy, counseling, or group supports
 - c) Physical exercise or active hobby (gardening, dancing, etc.)
 - d) Prescription medication
 - e) Supplements, vitamins, or over-the-counter medications
 - f) Other: _____
 - g) I am not doing any activities to support my mental health.
- 27) In the past month, how often have you felt sad, depressed, or hopeless?
 - a) Every day or nearly every day

- b) Regularly
- c) Occasionally
- d) Rarely
- e) Never

28) In the past month, how often have you felt nervous, on edge, worried or panic?

- a) Every day or nearly every day
- b) Regularly
- c) Occasionally
- d) Rarely
- e) Never
- 29) The following questions address sensitive topics related to mental health, specifically experiences with suicidal thoughts or acts of self-harm, and may be distressing for some individuals. If you find this content difficult, please feel free to skip this question, take a moment for self-care, and/or reach out to a support resource if needed.

24/7 National Suicide Prevention Hotline: dial 988 24/7 Crisis Text Line: Text "HOME" to 741741

[Select option to skip or continue]

- a) In the past 12 months, have you had suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm?
 - i) Yes
 - ii) No
 - iii) Prefer not to disclose
- b) If yes, to what extent do you feel your work environment contributed to these thoughts or actions?
 - i) Significantly contributed
 - ii) Somewhat contributed
 - iii) Did not contribute at all
 - iv) Prefer not to disclose

30) Do you ever feel concerned about how much or how often you drink alcohol?

- a) Yes
- b) No
- c) I do not drink alcohol
- d) Prefer not to disclose

31) In the past 12 months, has anyone expressed concern about your use of alcohol?

- a) Yes
- b) No
- c) I do not drink alcohol

- d) Prefer not to disclose
- 32) In the past 12 months, have you used drugs other than those prescribed for a current medical condition (i.e., recreational use)? [branching if "no" or "prefer not to disclose," skip to #33]
 - a) Yes
 - b) No
 - c) Prefer not to disclose

[If yes] Do you ever feel concerned about how much or how often you use drugs recreationally?

- i) Yes
- ii) No
- iii) Prefer not to disclose

[If yes] In In the past 12 months, has anyone expressed concern about your use of recreational drugs?

- iv) Yes
- v) No
- vi) Prefer not to disclose
- 33) To what extent do you agree with the following statement: The stress of my job and/or the culture at my workplace cause me to drink alcohol or use recreational drugs more than I otherwise would.
 - a) Strongly agree
 - b) Somewhat agree
 - c) Neither agree nor disagree
 - d) Somewhat disagree
 - e) Strongly disagree

34) My workplace social events include alcohol:

- a) Never
- b) Some of the time
- c) Often
- d) Always
- 35) Are you exposed to distressing material, experiences, or trauma related to your clients or others you encounter in doing your job?
 - a) Yes
 - b) No
 - c) Sometimes
 - d) Unsure

[If yes, sometimes, or unsure] How often do you find yourself thinking about work-related distressing material, experiences, or trauma <u>outside of work</u>?

- i) Never
- ii) Some of the time
- iii) Often
- iv) Always

[If yes, sometimes, or unsure] How much of an impact does exposure to distressing material, experiences, or trauma from work have on your mental health or wellbeing?

- v) Significant impact
- vi) Slight impact
- vii) No impact
- viii)Unsure
- 36) Does your employer offer wellness programs, initiatives, or other wellbeing resources?
 - a) Yes
 - b) No
 - c) I don't know

[If yes] What resources does your employer offer? Check all that apply.

- d) Educational content on well-being
- e) Membership or subscriptions to wellness resources or apps
- f) Direct financial support for well-being activities (gym stipends, etc.)
- g) Flexible options for mental health leave
- h) Access to or referrals for external wellness resources (coaches, therapists, etc.)
- i) Whole office mental health opportunities (scheduled walk/stretch breaks, periodic half days not on holidays, motivational speakers at staff meetings, etc.)
- j) Other, please specify:

37) Have you utilized any wellness programs offered by your employer?

- a) Yes
- b) No

[If no] If not, what prevents you from utilizing these resources? Check all that apply.

- (1) Stigma, or reputational/confidentiality concerns
- (2) Fear it will affect your path to promotion
- (3) Not having the time to utilize services
- (4) Doubt that these offerings will make a difference
- (5) I utilize other resources not provided by my employer
- (6) Too costly-financial or time away from work

- (7) I haven't needed these resources
- (8) Other, please specify:

38) Which of the following WSBA resources on well-being have you utilized? Check all that apply.

- a) CLEs on well-being related topics
- b) Online support groups (Healing Minds, Pathways to Productivity, Career Guidance)
- c) Referrals for services (for therapists, prescribers, treatment centers, Unbar)
- d) Peer advising
- e) Mental health consultations/brief therapy
- f) I have not used any of these resources.

[If they select (f) above] What prevents you from utilizing these resources? Check all that apply.

- (a) Concerns about professional discipline
- (b) Unaware of these resources from WSBA
- (c) Not having the time to utilize services
- (d) Doubt that these offerings will make a difference
- (e) I utilize other resources not provided by WSBA
- (f) Too costly—financial or time away from work
- (g) I haven't needed these resources
- (h) Other, please specify:
- 39) What sorts of additional resources do you think would be helpful to you if available through WSBA?
 - a) Additional CLEs or educational material
 - b) Published list of well-being professionals available without request or log-in
 - c) WSBA partnership with gym(s), weight management companies, etc. for discounted memberships
 - d) Publication of anonymous or signed stories contributed by WSBA members willing to share their struggles and/or successes regarding well-being challenges
 - e) Other suggestions (please list):
- 40) Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being? [Answer choices: not at all, somewhat, significantly]
 - a) Making court filing deadlines earlier than midnight
 - b) Standardizing court rules/preferences across counties
 - c) Consistent consequences for abusive/demeaning tactics within hearings (direct comments to opposing counsel, use of improper names such as "sweetheart" or "young man," repeatedly talking over or interrupting)
 - d) Feedback resource when concerns about judge's behavior (condescending attitude, being overly harsh, etc.)

- e) Other suggestions (please list here):
- 41) What could your employer, the legal community, courts, or legal institutions do to better support your mental health and wellbeing? [Open-ended response]

Interim Report Member Wellbeing Taskforce—Government and Legal Services Workgroup

By Judge Michael Finkle, Chair March 24, 2025

The Government and Legal Services Workgroup is focusing on identifying wellbeing issues specific to the discrete category of lawyers in government or legal services (e.g., legal aid) practice. This includes both criminal prosecution and defense, civil practice representing the government at city through state levels, and legal aid and other public interest contexts. Workgroup members included attorneys, the undersigned, a Supreme Court Justice and an ad hoc attorney member. Midway through our assignment, the second ad hoc member had to step down.

Our strategy was to develop a wellbeing survey that explored issues unique to our identified audience. We developed, refined, and disseminated a survey that has a return date of April 15 or sooner. Once we receive the survey results, we develop recommendations specific to that identified audience. The Taskforce as a whole can incorporate this workgroup's results into its report to the WSBA.

If anyone is interested, here is a summary of the questions on our survey:

- 1. Extent to which the survey-taker (ST) prioritizes wellbeing.
- 2, Extent to which wellbeing is impacted by compression fatigue.
- 2. Extent to which wellbeing is impacted by vicarious trauma.
- 3. Identify from list of factors that negatively impact wellbeing (eight factors plus a category for "none".
- 4. Rank current level of burnout (scale of 1-10).
- 5. Impact of funding for their organization on wellbeing and ability to perform job.
- 6. Impact of personal finances on stress levels or other aspects of wellbeing (e.g., student loan debt, cost of living, lower salary)
- 8. Participation in student loan forgiveness program and impact on wellbeing.

WASHINGTON STATE BAR ASSOCIATION

<u>Member Wellbeing Taskforce – Suicide and Addiction</u> <u>Workgroup</u>

Chair: Emily Arneson

Members: Bushra Rahim, Susan Lee, Laura Moss, Sara Smucker Barnwell

Ad Hoc: Annasara Purcell, Jenn Stuber, Aaron Paker

Duration: January 2025 to May 2025

Workgroup Focus/Deliverables:

Focus is on suicide and addition within the legal profession.

The workgroup should develop a schedule for meetings throughout the duration of the workgroup.

Working documents should be placed in the Suicide and Addiction Workgroup folder within SharePoint.

The workgroup should focus on outreach and research including: Review research and reports from other states to assist in orientation to the work (contained in SharePoint).

Research surveys from other states and be prepared to review the task force member survey results which should be available by April 7, 2025 and integrate information relevant to the workgroup topic into their final recommendations.

Topics of workgroup focus could include an exploration of root causes of addiction and substance use within the legal profession, factors contributing to suicidal ideation experienced by legal professionals, substance use, and other issues related to suicide and addiction within the legal profession.

Timeline for Workgroup Deliverables:

- <u>Ad-Hoc Members</u>: At least three identified ASAP. Jenn Stuber, Leslie Hagin, and Annasara Purcell are the names yet to be finalized.
- **<u>Verbal Progress Update</u>**: To be delivered monthly at the full taskforce meeting.

• <u>Written Update</u>: to entire TF due to Chair by March 28, 2025. This update does not need to be formal. A page long update outlining work plan, outreach/research methods, and progress towards completion will suffice.

Final Workgroup Report Writing:

- During the month of June, the two workgroups (and the Private Practice and Law Student/New Member Workgroups) will work on report writing with the objective of producing Final Reports by **June 27, 2025**.
- Final workgroup reports will be reviewed at the July full taskforce meeting.

Guest Speakers and Reading List – Suicide and Addiction Workgroup

Wil Miller—recovered from methamphetamine addiction and has written and spoken about it. Leslie Hagin—Leader of <u>Washington Lawyers Assisting Lawyers</u> and the Unbar Katherine Bender-Psychologist focused upon attorney suicide. Worked at the Dave Nee Foundation

Reading List

- <u>Stressed, Lonely, and Overcommitted: Predictors of Suicide Risk</u>
- <u>Why Lawyers are Prone to Suicide</u> (Patrick Krill; CNN Opinion (Jan. 21, 2014)).
- Big Law Killed My Husband
- <u>Trauma for the Tough-Minded Prosecutor</u> (Stacy Miles-Thorpe; The Texas Prosecutor Journal (July-Aug. 2016)).
- <u>The Legal Profession's Drinking Problem</u> (Patrick Krill; CNN Opinion (Feb. 6, 2016)).
- <u>About One-Fifth of Lawyers and Staffers Considered Suicide at Some</u> <u>Point in Their Careers, New Survey Says</u> (Debra Cassens Weiss; ABA Journal (May 10, 2022)).
- <u>One in 10 Young Lawyers Worldwide 'Experiencing Suicidal Thoughts'</u> (Jemma Slingo; The Law Society Gazette (Apr. 8, 2021)).
- <u>The Prevalence of Substance Use and Other Mental Health Concerns</u> <u>Among American Attorneys</u> (Patrick R. Krill, Ryan Johnson & Linda Albert; 2016:10 J. Addict. Med. 46-52 (Jan./Feb. 2016)).
- <u>The Lawyer, the Addict</u> (Eilene Zimmerman; New York Times (July 15, 2017)).
- <u>Depressive Symptoms and Suicidal Ideation Among Lawyers and Other</u> <u>Law Professionals</u> (Matthew S. Thiese, et al.; 63 J. Occup. & Env. Med. 381– 386 (May 2021)).
- <u>Stressed, Lonely, and Overcommitted: Predictors of Lawyer Suicide Risk</u> (Krill, et al; Healthcare Vol. 11, Issue 4 (2023)).

- [https:///s/Addressing-the-Lawyer-Suicide-Crisis-A-Guide-for-Bar-Leaders-Nick-Hansen-ABA-Bar-Leader-Sept-29-2023.pdf]Addressing the Lawyer Suicide Crisis: A Guide for Bar Leaders (Nick Hansen; American Bar Association Vol. 46, Issue 5 (September 29, 2023)).
- <u>Addressing the Effects of Vicarious Trauma Experienced by Court Employees,</u> <u>Tiffany Hammill, 2018</u>
- Line Rønning, Jocelyn Blumberg & Jesper Dammeyer (2020): Vicarious traumatisation in lawyers working with traumatised asylum seekers: a pilot study, Psychiatry, Psychology and Law, DOI

WASHINGTON STATE BAR ASSOCIATION

Member Wellbeing Survey 2025

WASHINGTON STATE BAR ASSOCIATION MEMBER WELLBEING SURVEY CONGRESSIONAL DISTRICT



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Date: February, 2025

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Appendix A: Washington State Bar Association Member Wellbeing Survey

Group Name	Number Responding	Number Possible	Response Rate
Total Company	903	10,000	9%
District 0	70	1,400	5%
District 1	57	700	8%
District 2	59	500	12%
District 3	64	500	13%
District 4	39	300	13%
District 5	86	800	11%
District 6	109	800	14%
District 7N	90	1,200	8%
District 7S	112	1,500	7%
District 8	54	500	11%
District 9	77	1,100	7%
District 10	86	700	12%

Section I: Response Rates

Items	Number Responding	Mean	Mean Graph N Y	No	Yes
5. Do you have caregiving responsibilities on a regular basis for one or more minor children, dependent adults, or aging parents?					
Total Company	903	1.40		60%	40%
District 0	70	1.53		47%	53%
District 1	57	1.35		65%	35%
District 2	59	1.37		63%	37%
District 3	64	1.30		70%	30%
District 4	39	1.33		67%	33%
District 5	86	1.40		60%	40%
District 6	109	1.38		62%	38%
District 7N	90	1.38		62%	38%
District 7S	112	1.39		61%	39%
District 8	54	1.52		48%	52%
District 9	77	1.47		53%	47%
District 10	86	1.40		60%	40%

	Number Responding	0% 25%	50%	75% 100%	Percent Responding
1. What is your age group?				1	
<25					
Total Company	1				0%
District 0	0	No valid cases			0%
District 1	0	No valid cases			0%
District 2	0	No valid cases			0%
District 3	0	No valid cases			0%
District 4	0	No valid cases			0%
District 5	0	No valid cases			0%
District 6	1				1%
District 7N	0	No valid cases			0%
District 7S	0	No valid cases			0%
District 8	0	No valid cases			0%
District 9	0	No valid cases			0%
District 10	0	No valid cases			0%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
1. What is your age group?			I	I		
25-29						
Total Company	2					0%
District 0	2					3%
District 1	0	No valid cases				0%
District 2	0	No valid cases				0%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	0	No valid cases				0%
District 6	0	No valid cases				0%
District 7N	0	No valid cases				0%
District 7S	0	No valid cases				0%
District 8	0	No valid cases				0%
District 9		No valid cases				0%
District 10	0	No valid cases				0%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
1. What is your age group?				I		
30-34						
Total Company	21					2%
District 0	5					7%
District 1	1	1				2%
District 2	0	No valid cases				0%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	0	No valid cases				0%
District 6	0	No valid cases				0%
District 7N	3					3%
District 7S	4					4%
District 8	0	No valid cases				0%
District 9						3%
District 10	6					7%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
1. What is your age group?				I		
35-39						
Total Compan	y 50					6%
District	5 5					7%
District	1 7					12%
District	2 0	No valid cases				0%
District	3 2					3%
District	4 0	No valid cases				0%
District	5 4					5%
District	6 3	-				3%
District 7						11%
District 7	6 12					11%
District	3 0	No valid cases				0%
District						3%
District 1	5					6%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
1. What is your age group?			I		I		
40-44	400						440(
Total Company	102						11%
District 0							17%
District 1	6						11%
District 2							3%
District 3							14%
District 4		No valid c	ases				0%
District 5							15%
District 6							8%
District 7N							10%
District 7S							15%
District 8							6%
District 9							16%
District 10	10						12%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
1. What is your age group?			I		I		
45-49							
Total Company	106						12%
District 0	12						17%
District 1	8						14%
District 2							7%
District 3							6%
District 4	6						15%
District 5							16%
District 6							6%
District 7N							20%
District 7S							9%
District 8							11%
District 9							13%
District 10	7						8%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
1. What is your age group?			I	I	I		
50-54							
Total Company	101						11%
District 0	5						7%
District 1	5						9%
District 2							14%
District 3							3%
District 4							13%
District 5	13						15%
District 6							10%
District 7N							10%
District 7S							13%
District 8	7						13%
District 9							14%
District 10	10						12%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
1. What is your age group?			I		I		
55-59							
Total Company	123						14%
District 0	8						11%
District 1	6						11%
District 2	14						24%
District 3	14						22%
District 4	6						15%
District 5	6						7%
District 6	15						14%
District 7N							10%
District 7S							10%
District 8	14						26%
District 9							14%
District 10	9						10%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
1. What is your age group?			I		I		
60-64							
Total Company	107						12%
District 0	7						10%
District 1	3						5%
District 2							8%
District 3							9%
District 4							33%
District 5							8%
District 6							17%
District 7N	5						6%
District 7S							12%
District 8							11%
District 9							13%
District 10	14						16%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
1. What is your age group?			I		I		
65-69							
Total Company	129						14%
District 0	7						10%
District 1	11						19%
District 2	14						24%
District 3	11						17%
District 4	5						13%
District 5	18		1				21%
District 6	12						11%
District 7N	11						12%
District 7S	15						13%
District 8	6						11%
District 9							9%
District 10	12						14%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
1. What is your age group?			I		I		
70+							1001
Total Company	161						18%
District 0							10%
District 1	10		_				18%
District 2			1				20%
District 3							25%
District 4							10%
District 5							13%
District 6							30%
District 7N							18%
District 7S							13%
District 8							22%
District 9							16%
District 10	13						15%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
2. What is your gender identity?			I	I	I		
Female							
Total Company	390						43%
District 0	31			-			44%
District 1	29						51%
District 2	26						44%
District 3	31						48%
District 4	18						46%
District 5	35		I	1			41%
District 6	40						37%
District 7N	38						42%
District 7S	46		1	1			41%
District 8							39%
District 9							49%
District 10	37	J		-			43%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
2. What is your gender identity?					I		
Male							
Total Company	461						51%
District 0							50%
District 1							44%
District 2							51%
District 3							47%
District 4							46%
District 5	44						51%
District 6	64						59%
District 7N	47						52%
District 7S							49%
District 8							59%
District 9	35						45%
District 10	46						53%

	Number Responding	0% 25%	50%	75% 100%	Percent Responding
2. What is your gender identity?			I	I	
Transgender					
Total Company	4				0%
District 0	0	No valid cases			0%
District 1	0	No valid cases			0%
District 2	0	No valid cases			0%
District 3	1				2%
District 4	1	-			3%
District 5	0	No valid cases			0%
District 6	0	No valid cases			0%
District 7N	0	No valid cases			0%
District 7S	1	1			1%
District 8	0	No valid cases			0%
District 9	0	No valid cases			0%
District 10	1				1%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
2. What is your gender identity?			I	1		
Non-Binary / Non-Conforming						
Total Company	3					0%
District 0	2					3%
District 1	0	No valid cases				0%
District 2	0	No valid cases				0%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	0	No valid cases				0%
District 6	0	No valid cases				0%
District 7N	0	No valid cases				0%
District 7S	0	No valid cases				0%
District 8	0	No valid cases				0%
District 9	1					1%
District 10	0	No valid cases				0%

	Number Responding	0% 25% 5	0% 75% 100%	Percent Responding
2. What is your gender identity?			1	
Other (please specify)				
Total Company	4			0%
District 0	0	No valid cases		0%
District 1	1	1		2%
District 2	0	No valid cases		0%
District 3	0	No valid cases		0%
District 4	0	No valid cases		0%
District 5	1			1%
District 6	1			1%
District 7N	0	No valid cases		0%
District 7S	1			1%
District 8	0	No valid cases		0%
District 9	0	No valid cases		0%
District 10	0	No valid cases		0%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
2. What is your gender identity?			I		I		
Prefer not to disclose							
Total Company	41						5%
District 0	2						3%
District 1	2						4%
District 2	2 3						5%
District 3	2						3%
District 4	2	_					5%
District 5	6						7%
District 6	4						4%
District 7N							6%
District 7S	9						8%
District 8							2%
District 9							4%
District 10	2						2%

	Number Responding	0% 25%	509	% 75%	100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:				I		
American Indian/Native American/Alaskan Native						
Total Company	28	-				3%
District 0	3	-				4%
District 1	2	-				4%
District 2	0	No valid cases				0%
District 3	3	-				5%
District 4	1	-				3%
District 5	3	-				3%
District 6						6%
District 7N	2 3	1				2%
District 7S	3	—				3%
District 8	2	-				4%
District 9	1					1%
District 10	1					1%

	Number Responding	0% 25% 5	50% 7 <u>5</u> % 100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:			I I	
Asian-Central Asian				
Total Company	4			0%
District 0	0	No valid cases		0%
District 1	0	No valid cases		0%
District 2	2			3%
District 3	0	No valid cases		0%
District 4	0	No valid cases		0%
District 5	0	No valid cases		0%
District 6	1	1		1%
District 7N	1	1		1%
District 7S	0	No valid cases		0%
District 8	0	No valid cases		0%
District 9	0	No valid cases		0%
District 10	0	No valid cases		0%

	Number Responding	0% 25% 50	0% 75% 100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:				
Asian-East Asian				
Total Company	20	4		2%
District 0	1	1		1%
District 1	2	—		4%
District 2	1			2%
District 3	1			2%
District 4	1	—		3%
District 5	1			1%
District 6	1			1%
District 7N	7			8%
District 7S	1			1%
District 8	1			2%
District 9	3			4%
District 10	0	No valid cases		0%

	Number Responding	0% 25% 5	0% 75% 100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:			1	
Asian-South Asian				
Total Company	5			1%
District 0	1			1%
District 1	0	No valid cases		0%
District 2	0	No valid cases		0%
District 3	0	No valid cases		0%
District 4	0	No valid cases		0%
District 5	0	No valid cases		0%
District 6	0	No valid cases		0%
District 7N	1			1%
District 7S	1			1%
District 8		No valid cases		0%
District 9				3%
District 10	0	No valid cases		0%

	Number Responding	0% 25% 50	0% 75% 100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:				
Asian-Southeast Asian				
Total Company	10			1%
District 0	2			3%
District 1	2	—		4%
District 2	1			2%
District 3	0	No valid cases		0%
District 4	0	No valid cases		0%
District 5	1	1		1%
District 6	0	No valid cases		0%
District 7N	2			2%
District 7S	0	No valid cases		0%
District 8	0	No valid cases		0%
District 9	2			3%
District 10	0	No valid cases		0%

	Number Responding	0% 25% 5	0% 75% 100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:				
Asian-Unspecified				
Total Company	4			0%
District 0	0	No valid cases		0%
District 1	1			2%
District 2	0	No valid cases		0%
District 3	0	No valid cases		0%
District 4	0	No valid cases		0%
District 5	0	No valid cases		0%
District 6	1	1		1%
District 7N	0	No valid cases		0%
District 7S	0	No valid cases		0%
District 8	0	No valid cases		0%
District 9	2	—		3%
District 10	0	No valid cases		0%

	Number Responding	0% 25%	50% 75%	5 100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:			1 1		
Black/African American/African Descent					
Total Company	19				2%
District 0	0	No valid cases			0%
District 1	2	—			4%
District 2	0	No valid cases			0%
District 3	3				5%
District 4	1	-			3%
District 5	0	No valid cases			0%
District 6	0	No valid cases			0%
District 7N	1	<u> </u>			1%
District 7S	3	—			3%
District 8	3				6%
District 9	2				3%
District 10	4				5%

	Number Responding	0% 25%	509	% 75%	100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:			l l	I		
Hispanic/Latinx						
Total Company	35					4%
District 0	7					10%
District 1	1					2%
District 2	0	No valid cases				0%
District 3						3%
District 4	3					8%
District 5		-				3%
District 6	2	1				2%
District 7N	4					4%
District 7S	5	—				4%
District 8	3					6%
District 9	2					3%
District 10	3					3%

	Number Responding	0% 25% 50	0% 75% 100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:				
Middle Eastern Descent				.
Total Company	14	•		2%
District 0		1		1%
District 1	2			4%
District 2	0	No valid cases		0%
District 3	1	A		2%
District 4	0	No valid cases		0%
District 5		1		2%
District 6	3	-		3%
District 7N	1	1		1%
District 7S	2	1		2%
District 8	1	1		2%
District 9	0	No valid cases		0%
District 10	1			1%

	Number Responding	0% 25% 50	0% 75% 100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:			1	
Multi-Racial/Bi-Racial Total Company	20	7		2%
District 0				4%
District 1	1	No volid cooco		2%
District 2		No valid cases		0%
District 3		No volid cooco		2%
District 4		No valid cases		0%
District 5				1% 2%
District 6 District 7N				2% 1%
District 7S		- -		3%
District 8				5% 6%
District 8		4		1%
District 9 District 10				1% 5%

	Number Responding	0% 25%	50% 75	5% 100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:				I	
Pacific Islander/Native Hawaiian					
Total Company	3				0%
District 0	0	No valid cases			0%
District 1	0	No valid cases			0%
District 2	2				3%
District 3	0	No valid cases			0%
District 4	0	No valid cases			0%
District 5	0	No valid cases			0%
District 6	1	1			1%
District 7N	0	No valid cases			0%
District 7S	0	No valid cases			0%
District 8	0	No valid cases			0%
District 9	0	No valid cases			0%
District 10	0	No valid cases			0%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:			I		I		
White/European Descent							
Total Company	748						83%
District 0	61					1	87%
District 1	40						70%
District 2	53						90%
District 3	54						84%
District 4	33						85%
District 5	72						84%
District 6	95					1	87%
District 7N	73						81%
District 7S	88						79%
District 8	44						81%
District 9	65						84%
District 10	70				1		81%

	Number Responding	0% 25%	50%	75% 100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:			1	I	
Other (please specify)					
Total Company	15				2%
District 0	0	No valid cases			0%
District 1	1	1			2%
District 2	2				3%
District 3	1				2%
District 4	1	-			3%
District 5	0	No valid cases			0%
District 6	2	1			2%
District 7N	0	No valid cases			0%
District 7S	3	—			3%
District 8	0	No valid cases			0%
District 9	2				3%
District 10	3				3%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
3. What is your race/ethnicity? Select all that apply:			I		I		
Prefer not to disclose							
Total Company	55						6%
District 0	4						6%
District 1	7						12%
District 2	3						5%
District 3							6%
District 4		-					5%
District 5	8						9%
District 6	4	-					4%
District 7N	4						4%
District 7S							9%
District 8							6%
District 9							3%
District 10	4						5%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
4. What is your relationship status?			I		I		
Married							
Total Company	629						70%
District 0	50			_			71%
District 1							60%
District 2							69%
District 3							77%
District 4					4		67%
District 5	66						77%
District 6							69%
District 7N	63						70%
District 7S	69						62%
District 8	42						78%
District 9	51				1		66%
District 10	63						73%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
4. What is your relationship status?			I		I		
Not married, but in a committed relationship							
Total Company	66						7%
District 0	7						10%
District 1	3						5%
District 2	3						5%
District 3							2%
District 4	2						5%
District 5		1					1%
District 6							7%
District 7N							12%
District 7S							11%
District 8							9%
District 9							6%
District 10	8						9%

	Number Responding	0%	25%	50%	75% 100%	Percent Responding
4. What is your relationship status?			I		I	
Single						
Total Company	73					8%
District 0						10%
District 1	5					9%
District 2						10%
District 3						9%
District 4						8%
District 5						10%
District 6						6%
District 7N						8%
District 7S						10%
District 8		No valid ca	ases			0%
District 9						9%
District 10	6					7%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
4. What is your relationship status?			Ι	ľ	I		
Divorced							
Total Company	81						9%
District 0	4						6%
District 1	7						12%
District 2							10%
District 3							9%
District 4	6						15%
District 5	5						6%
District 6	11						10%
District 7N							4%
District 7S	13						12%
District 8	4						7%
District 9							10%
District 10	7						8%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
4. What is your relationship status?				I		
Widowed						
Total Company	13					1%
District 0	0	No valid cases				0%
District 1	0	No valid cases				0%
District 2	1					2%
District 3	0	No valid cases				0%
District 4	1	-				3%
District 5	0	No valid cases				0%
District 6	4	-				4%
District 7N	2	1				2%
District 7S	0	No valid cases				0%
District 8	2	—				4%
District 9	3					4%
District 10	0	No valid cases				0%

	Number Responding	0% 25% 50	D% 75% 100%	Percent Responding
4. What is your relationship status?			I I	
Other (please specify) Total Company	5			1%
District 0		No valid cases		0%
District 1	2			4%
District 2		No valid cases		0%
District 3	1	1		2%
District 4	0	No valid cases		0%
District 5	0	No valid cases		0%
District 6	1	1		1%
District 7N	0	No valid cases		0%
District 7S	0	No valid cases		0%
District 8		No valid cases		0%
District 9				1%
District 10		No valid cases		0%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
4. What is your relationship status?					I		
Prefer not to disclose							
Total Company	36						4%
District 0	2	-					3%
District 1	6						11%
District 2	2						3%
District 3	1						2%
District 4	1	-					3%
District 5	5						6%
District 6	4						4%
District 7N		-					3%
District 7S	7						6%
District 8	1						2%
District 9							3%
District 10	2						2%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
6. What is your sexual orientation?			I	I	I		
Heterosexual							000/
Total Company	738						82%
District 0							76%
District 1							86%
District 2				_			90%
District 3							83%
District 4	35					-	90%
District 5	65						76%
District 6	93						85%
District 7N	74						82%
District 7S	84						75%
District 8	49			_			91%
District 9	59						77%
District 10	71						83%

	Number Responding	0% 25% 50	0% 75% 100%	Percent Responding
6. What is your sexual orientation?				
Gay				
Total Company	13			1%
District 0	3			4%
District 1	0	No valid cases		0%
District 2	0	No valid cases		0%
District 3	1			2%
District 4	0	No valid cases		0%
District 5	0	No valid cases		0%
District 6	1	1		1%
District 7N	3			3%
District 7S	4			4%
District 8	0	No valid cases		0%
District 9		No valid cases		0%
District 10	1			1%

	Number Responding	0% 25% 5	0% 75% 100%	Percent Responding
6. What is your sexual orientation?				
Lesbian				
Total Company	6			1%
District 0	0	No valid cases		0%
District 1	0	No valid cases		0%
District 2	0	No valid cases		0%
District 3	0	No valid cases		0%
District 4	0	No valid cases		0%
District 5	1			1%
District 6	1			1%
District 7N	0	No valid cases		0%
District 7S				1%
District 8				2%
District 9				1%
District 10	1			1%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
6. What is your sexual orientation?				I		
Asexual						
Total Company	4					0%
District 0	0	No valid cases				0%
District 1	0	No valid cases				0%
District 2	0	No valid cases				0%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	3	-				3%
District 6	0	No valid cases				0%
District 7N	0	No valid cases				0%
District 7S	1	1				1%
District 8	0	No valid cases				0%
District 9	0	No valid cases				0%
District 10	0	No valid cases				0%

	Number Responding	0% 25%	50%	75% 100%	Percent Responding
6. What is your sexual orientation?					
Bisexual					
Total Company	24				3%
District 0	3				4%
District 1	0	No valid cases			0%
District 2	1				2%
District 3	2				3%
District 4	1	-			3%
District 5	4				5%
District 6	1				1%
District 7N	1				1%
District 7S		-			4%
District 8	2				4%
District 9					3%
District 10	2				2%

	Number Responding	0% 259	6 50)% 75	i% 100%	Percent Responding
6. What is your sexual orientation?				1		
Pansexual						
Total Company	3					0%
District 0	2					3%
District 1	0	No valid case	3			0%
District 2	0	No valid case	6			0%
District 3	0	No valid case	6			0%
District 4	0	No valid case	6			0%
District 5	0	No valid case	6			0%
District 6	0	No valid case	6			0%
District 7N	0	No valid case	6			0%
District 7S	1					1%
District 8	0	No valid case	6			0%
District 9	0	No valid case	6			0%
District 10	0	No valid case	6			0%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
6. What is your sexual orientation?				I		
Queer						
Total Company	10					1%
District 0	0	No valid cases				0%
District 1	0	No valid cases				0%
District 2	1					2%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	0	No valid cases				0%
District 6	0	No valid cases				0%
District 7N	4	-				4%
District 7S	2					2%
District 8	0	No valid cases				0%
District 9	1					1%
District 10	2					2%

	Number Responding	0% 25% 5	50% 75% 100%	Percent Responding
6. What is your sexual orientation?			1 1	
Questioning or unsure				
Total Company	2			0%
District 0	0	No valid cases		0%
District 1	0	No valid cases		0%
District 2	0	No valid cases		0%
District 3	0	No valid cases		0%
District 4	0	No valid cases		0%
District 5	1	1		1%
District 6	0	No valid cases		0%
District 7N	0	No valid cases		0%
District 7S	0	No valid cases		0%
District 8	0	No valid cases		0%
District 9	0	No valid cases		0%
District 10	1			1%

	Number Responding	0% 25% 5	0% 75% 100%	Percent Responding
6. What is your sexual orientation?			1 1	
An identity not listed: please specify				
Total Company	5			1%
District 0	0	No valid cases		0%
District 1	0	No valid cases		0%
District 2	0	No valid cases		0%
District 3	1			2%
District 4	1	_		3%
District 5	1	1		1%
District 6	1	1		1%
District 7N	0	No valid cases		0%
District 7S	1			1%
District 8	0	No valid cases		0%
District 9	0	No valid cases		0%
District 10	0	No valid cases		0%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
6. What is your sexual orientation?			Ι	I	I		
Prefer not to disclose							
Total Company	98						11%
District 0	9						13%
District 1	8						14%
District 2	4						7%
District 3	7						11%
District 4	2	-					5%
District 5	11						13%
District 6							11%
District 7N							9%
District 7S							12%
District 8		-	_				4%
District 9							18%
District 10	8						9%

Section III: Client Specific

Items	Number Responding	Mean	Mean Graph N Y	No	Yes
18. Does your employer have a minimum billable hour expectation?					
Total Company	898	1.14		86%	14%
District 0	70	1.27		73%	27%
District 1	57	1.12		88%	12%
District 2	58	1.07		93%	7%
District 3	62	1.08		92%	8%
District 4	39	1.05	1	95%	5%
District 5	86	1.12		88%	12%
District 6	109	1.07		93%	7%
District 7N	90	1.26		74%	26%
District 7S	111	1.20		80%	20%
District 8	53	1.17		83%	17%
District 9	77	1.10		90%	10%
District 10	86	1.08		92%	8%

Items	Number Responding	Mean	Mean Graph N Y	No	Yes
36. Do you want to skip these questions?					
Total Company	894	1.17		83%	17%
District 0	70	1.10		90%	10%
District 1	57	1.21		79%	21%
District 2	58	1.17		83%	17%
District 3	61	1.11		89%	11%
District 4	39	1.10		90%	10%
District 5	86	1.21		79%	21%
District 6	109	1.20		80%	20%
District 7N	89	1.18		82%	18%
District 7S	110	1.18		82%	18%
District 8	53	1.21		79%	21%
District 9	76	1.16		84%	16%
District 10	86	1.19		81%	19%

Items	Number Responding	Mean	Mean Graph N Y	No	Yes
51. Have you utilized any wellness programs offered by your employer?					
Total Company	358	1.51		49%	51%
District 0	41	1.39		61%	39%
District 1	21	1.71		29%	71%
District 2	24	1.54		46%	54%
District 3	17	1.65		35%	65%
District 4	15	1.47		53%	47%
District 5	31	1.48		52%	48%
District 6	34	1.56		44%	56%
District 7N	36	1.61		39%	61%
District 7S	56	1.46		54%	46%
District 8	23	1.43		57%	43%
District 9	27	1.63		37%	63%
District 10	33	1.39		61%	39%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
7. In what county is your primary practice and/or workplace?				l	I		
King, Pierce, Snohomish, Spokane, or Clark							
Total Company	510						57%
District 0							24%
District 1	52					_	91%
District 2							42%
District 3							40%
District 4		No valid c	ases				0%
District 5							60%
District 6				-			48%
District 7N							82%
District 7S							72%
District 8							69%
District 9							84%
District 10	30						35%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
7. In what county is your primary practice and/or workplace?			I	I	I		
Thurston, Kitsap, Yakima, Whatcom, or Benton Total Company	129						14%
District 0 District 1	3	I∎ No valid	d cases				4% 0%
District 2 District 3	8						14% 3%
District 4 District 5	32			-			82% 2%
District 6	30						28%
District 7N District 7S	1						3% 1%
District 8 District 9							4% 1%
District 10	45						52%

	Number Responding	0% 25%	50%	75% 100%	Percent Responding
7. In what county is your primary practice and/or workplace?				1	
Skagit, Cowlitz, Grant, Franklin, Lewis, Island, Chelan, Cla					
Total Company	58				6%
District 0	3	-			4%
District 1	0	No valid cases			0%
District 2	16				27%
District 3	9				14%
District 4	4				10%
District 5	3	-			3%
District 6	10				9%
District 7N	1				1%
District 7S		—			3%
District 8	8				15%
District 9		4			1%
District 10	0	No valid cases			0%

	Number Responding	0% 25% 50	D% 75% 100%	Percent Responding
7. In what county is your primary practice and/or workplace?		I		
Stevens, Whitman, Kittitas, Douglas, Okanogan, Jefferson, Pa				
Total Company	17			2%
District 0	2			3%
District 1	0	No valid cases		0%
District 2	0	No valid cases		0%
District 3				3%
District 4	3			8%
District 5	4			5%
District 6	2	1		2%
District 7N	0	No valid cases		0%
District 7S	1	1		1%
District 8	3			6%
District 9	0	No valid cases		0%
District 10	0	No valid cases		0%

	Number Responding	0% 25%	50% 75% 100'	Percent Responding
7. In what county is your primary practice and/or workplace?			1	
San Juan, Pend Oreille, Skamania, Lincoln, Ferry, Wahkiakum,				
Total Company	7			1%
District 0	0	No valid cases		0%
District 1	0	No valid cases		0%
District 2	2			3%
District 3	4			6%
District 4	0	No valid cases		0%
District 5	1	1		1%
District 6	0	No valid cases		0%
District 7N	0	No valid cases		0%
District 7S	0	No valid cases		0%
District 8	0	No valid cases		0%
District 9	0	No valid cases		0%
District 10	0	No valid cases		0%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
7. In what county is your primary practice and/or workplace?			Ι	I	I		
Other, including outside of Washington State							
Total Company	181						20%
District 0	45						64%
District 1	5						9%
District 2	8						14%
District 3	21						33%
District 4	0	No valid	l cases				0%
District 5							28%
District 6	15						14%
District 7N							13%
District 7S	26						23%
District 8							7%
District 9							13%
District 10	11						13%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
8. How many years have you been licensed to practice law?				I		
Less than 1						
Total Company	0	No valid cases				0%
District 0	0	No valid cases				0%
District 1	0	No valid cases				0%
District 2	0	No valid cases				0%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	0	No valid cases				0%
District 6	0	No valid cases				0%
District 7N	0	No valid cases				0%
District 7S	0	No valid cases				0%
District 8	0	No valid cases				0%
District 9	0	No valid cases				0%
District 10	0	No valid cases				0%

	Number Responding	0% 25% 5	0% 75% 100%	Percent Responding
8. How many years have you been licensed to practice law?				
1 to 5 years				
Total Company	<u>/</u> 21			2%
District 0	8			11%
District 1	0	No valid cases		0%
District 2	2 0	No valid cases		0%
District 3	0	No valid cases		0%
District 4	0	No valid cases		0%
District 5	0	No valid cases		0%
District 6	1	1		1%
District 7N		-		4%
District 7S	2	X		2%
District 8	0	No valid cases		0%
District 9	0	No valid cases		0%
District 10	6			7%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
8. How many years have you been licensed to practice law?			1	I		
6 to 10 years						
Total Compan	y 45					5%
District	0 4					6%
District	1 5					9%
District	2 0	No valid cases				0%
District	3 1					2%
District	4 0	No valid cases				0%
District	5 1					1%
District		-				4%
District 71						9%
District 75	6 10					9%
District		No valid cases				0%
District						6%
District 1	7					8%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
8. How many years have you been licensed to practice law?			I	1	1		
11 to 20 years							
Total Company	241						27%
District 0	28			1			40%
District 1	17						30%
District 2	9						15%
District 3	16						25%
District 4	2	-					5%
District 5	37						43%
District 6	20		-				18%
District 7N	27						30%
District 7S	36		1				32%
District 8	6						11%
District 9	23						30%
District 10	20						23%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
8. How many years have you been licensed to practice law?			I		I		
21 to 30 years							
Total Compan	y 234						26%
District	0 15						21%
District	1 7						12%
District	2 21						36%
District	3 18						29%
District	4 16						41%
District	5 19						22%
District	30						28%
District 7	N 18						20%
District 7	5 29						26%
District	8 21						39%
District							34%
District 1	0 14						16%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
8. How many years have you been licensed to practice law?			I		I		
31 to 40 years							
Total Company	/ 200						22%
District	8						11%
District	1 15						26%
District	2 15						25%
District	3 12						19%
District	15		1				38%
District	5 19						22%
District	6 23						21%
District 7N	I 19						21%
District 75	6 21		-1				19%
District	3 13						24%
District							19%
District 10) 25						29%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
8. How many years have you been licensed to practice law?			Ι		I		
More than 40 years							
Total Company	161						18%
District 0	7						10%
District 1	13						23%
District 2	14						24%
District 3							25%
District 4	6						15%
District 5	10						12%
District 6	31						28%
District 7N							16%
District 7S	14						13%
District 8							26%
District 9							10%
District 10	14						16%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
9. Which of the following is your WSBA license type?			1	I		
Judicial	04					00/
Total Company	21					2%
District 0	2					3%
District 1	0	No valid cases				0%
District 2						2%
District 3	2					3%
District 4	4					10%
District 5	4					5%
District 6	2	1				2%
District 7N	0	No valid cases				0%
District 7S	0	No valid cases				0%
District 8	2	-				4%
District 9	0	No valid cases				0%
District 10	4					5%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
9. Which of the following is your WSBA license type?			I		I		
Attorney (including Active, Honorary, Inactive, and Pro Bono	004						0.00/
Total Company	881						98%
District 0	68						97%
District 1	57						100%
District 2				_			98%
District 3							97%
District 4							90%
District 5	82						95%
District 6							98%
District 7N							100%
District 7S							100%
District 8							96%
District 9							100%
District 10	82						95%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
9. Which of the following is your WSBA license type?				I		
Limited License Legal Technician (LLLT) (including Active, I						
Total Company	0	No valid cases				0%
District 0	0	No valid cases				0%
District 1	0	No valid cases				0%
District 2	0	No valid cases				0%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	0	No valid cases				0%
District 6	0	No valid cases				0%
District 7N	0	No valid cases				0%
District 7S	0	No valid cases				0%
District 8	0	No valid cases				0%
District 9	0	No valid cases				0%
District 10	0	No valid cases				0%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
9. Which of the following is your WSBA license type?				I		
Limited Practice Officer (LPO) (including Active and Inactiv						
Total Company	0	No valid cases				0%
District 0	0	No valid cases				0%
District 1		No valid cases				0%
District 2	0	No valid cases				0%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	0	No valid cases				0%
District 6	0	No valid cases				0%
District 7N	0	No valid cases				0%
District 7S	0	No valid cases				0%
District 8	0	No valid cases				0%
District 9	0	No valid cases				0%
District 10	0	No valid cases				0%

	Number Responding	0% 25%	50%	75% 100%	Percent Responding
11. Which setting best describes your current judicial position?				1	
Appellate Court (any level)					
Total Company	1				5%
District 0	0	No valid cases			0%
District 1	0	No valid cases			0%
District 2	0	No valid cases			0%
District 3	0	No valid cases			0%
District 4	0	No valid cases			0%
District 5	0	No valid cases			0%
District 6	0	No valid cases			0%
District 7N	0	No valid cases			0%
District 7S	0	No valid cases			0%
District 8	0	No valid cases			0%
District 9	0	No valid cases			0%
District 10	1				25%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
11. Which setting best describes your current judicial position?			I	1	1		
Superior, District, or Municipal Court							
Total Company	15						71%
District 0	1						50%
District 1	0	No valid	l cases				0%
District 2							100%
District 3				_			100%
District 4							100%
District 5				_			75%
District 6							100%
District 7N		No valid					0%
District 7S		No valid	l cases				0%
District 8							50%
District 9		No valid	cases				0%
District 10	1						25%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
11. Which setting best describes your current judicial position?				I		
Juvenile Court						
Total Company	0	No valid cases				0%
District 0	0	No valid cases				0%
District 1	0	No valid cases				0%
District 2	0	No valid cases				0%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	0	No valid cases				0%
District 6	0	No valid cases				0%
District 7N	0	No valid cases				0%
District 7S	0	No valid cases				0%
District 8	0	No valid cases				0%
District 9	0	No valid cases				0%
District 10	0	No valid cases				0%

	Number Responding	0% 25%	50%	75% 100%	Percent Responding
11. Which setting best describes your current judicial position?				I	
Tribal Court					
Total Company	0	No valid cases			0%
District 0	0	No valid cases			0%
District 1	0	No valid cases			0%
District 2	0	No valid cases			0%
District 3	0	No valid cases			0%
District 4	0	No valid cases			0%
District 5	0	No valid cases			0%
District 6	0	No valid cases			0%
District 7N	0	No valid cases			0%
District 7S	0	No valid cases			0%
District 8	0	No valid cases			0%
District 9	0	No valid cases			0%
District 10	0	No valid cases			0%

	Number Responding	0% 25% 5	50% 75% 100%	Percent Responding
11. Which setting best describes your current judicial position?				
Administrative Law Judge				
Total Company	4			19%
District 0	1		1	50%
District 1	0	No valid cases		0%
District 2	0	No valid cases		0%
District 3	0	No valid cases		0%
District 4	0	No valid cases		0%
District 5	1			25%
District 6	0	No valid cases		0%
District 7N	0	No valid cases		0%
District 7S	0	No valid cases		0%
District 8	0	No valid cases		0%
District 9	0	No valid cases		0%
District 10	2			50%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
11. Which setting best describes your current judicial position?				I		
Magistrate Judge						
Total Company	0	No valid cases				0%
District 0	0	No valid cases				0%
District 1	0	No valid cases				0%
District 2	0	No valid cases				0%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	0	No valid cases				0%
District 6	0	No valid cases				0%
District 7N	0	No valid cases				0%
District 7S	0	No valid cases				0%
District 8	0	No valid cases				0%
District 9	0	No valid cases				0%
District 10	0	No valid cases				0%

	Number Responding	0% 25%	50% 75% 100	Percent Responding
11. Which setting best describes your current judicial position?				
Other, please specify:				
Total Company	1			5%
District 0	0	No valid cases		0%
District 1	0	No valid cases		0%
District 2	0	No valid cases		0%
District 3	0	No valid cases		0%
District 4	0	No valid cases		0%
District 5	0	No valid cases		0%
District 6	0	No valid cases		0%
District 7N	0	No valid cases		0%
District 7S	0	No valid cases		0%
District 8	1			50%
District 9	0	No valid cases		0%
District 10	0	No valid cases		0%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
12. Which of the following best describes your <u><i>primary</i></u> area of practice?			I		I		
Litigation (civil) Total Company	219						25%
District 0 District 1 District 2 District 3 District 4 District 5 District 5 District 6 District 7N District 7S District 8 District 9 District 10	19 12 14 11 3 20 28 30 35 8 17						28% 21% 24% 18% 9% 24% 26% 33% 32% 15% 22% 27%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
12. Which of the following best describes your <u><i>primary</i></u> area of practice?			I		I		
Litigation (criminal)	77						00/
Total Company	77						9%
District 0							6%
District 1	1	1					2%
District 2							7%
District 3	2						3%
District 4	10						29%
District 5	8						10%
District 6	10						9%
District 7N	6						7%
District 7S	8						7%
District 8	3						6%
District 9	8						10%
District 10	13						16%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
12. Which of the following best describes your <u><i>primary</i></u> area of practice?			I		I		
Transactional (e.g., business, real property, contracts) Total Company	/ 172						20%
District 0 District 1	18						16% 32%
District 2 District 3 District 4	3 14						17% 23% 6%
District 5 District 6	5 16						20% 20%
District 7N District 7S	24						21% 22% 27%
District 8 District 9 District 10	9 19						27% 25% 5%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
12. Which of the following best describes your <u><i>primary</i></u> area of practice?			I		I		
Family Law							
Total Company	/ 71						8%
District 0	2						3%
District 1	7						12%
District 2	2 4						7%
District 3							15%
District 4	5						14%
District 5	5 8						10%
District 6	6 9						8%
District 7N	I 8						9%
District 7S	6						5%
District 8	8 4						8%
District 9	5						6%
District 10) 4						5%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
12. Which of the following best describes your <u><i>primary</i></u> area of practice?			T		Ι		
Administrative, Government or Regulatory Total Company	149						17%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7N District 7S District 8 District 9 District 10	4 14 12 6 12 18 9 16 8 10						28% 7% 24% 20% 17% 15% 10% 14% 15% 13% 26%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
12. Which of the following best describes your <u><i>primary</i></u> area of practice?			I		I		
Other, please explain Total Company	192						22%
District 0 District 1 District 2 District 3 District 3 District 4 District 5 District 6 District 7N District 7N District 7S District 8 District 9 District 10	13 15 12 13 9 18 21 18 22 15 18						19% 26% 21% 26% 22% 20% 20% 20% 20% 20% 29% 23% 23%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
13. Which of the following best describes the organization where you currently work?			ľ	ľ			
Private Practice: Solo Total Company	273						30%
District 0 District 1 District 2 District 3	22 24						11% 39% 41% 38%
District 4 District 5 District 6 District 7N	12 29 40						31% 34% 37% 24%
District 7S District 8 District 9 District 10	27 19 21						24% 36% 27% 29%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
13. Which of the following best describes the organization where you currently work?			l		I		
Private Practice: 2 to 5 practitioners Total Company	134						15%
District 0 District 1 District 2 District 3 District 4 District 5 District 5 District 6 District 7N District 7S District 8 District 9	12 7 6 13 14 12 15 4						11% 21% 12% 24% 15% 15% 13% 13% 14% 8% 21%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
13. Which of the following best describes the organization where you currently work?					I		
Private Practice: 6 to 15 practitioners							
Total Company	66						7%
District 0	3						4%
District 1	6						11%
District 2							7%
District 3							5%
District 4							8%
District 5		-					3%
District 6							8%
District 7N							11%
District 7S							5%
District 8							9%
District 9							6%
District 10	9						10%

	Number Responding	0% 25%	50%	75% 100%	Percent Responding
13. Which of the following best describes the organization where you currently work?					
Private Practice: 16 to 35 practitioners Total Company	26	-			3%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 9 District 10	1 0 1 4 5 4 3 2 0	No valid cases No valid cases			4% 2% 0% 2% 3% 5% 4% 3% 4% 0% 2%

	Number Responding	0% 25% 5	0% 75% 100%	Percent Responding
13. Which of the following best describes the organization where you currently work?				
Private Practice: 36 to 75 practitioners Total Company	7			1%
District 0 District 1 District 2 District 3 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 9	1 0 0 3 0 2 1 0	No valid cases No valid cases		0% 2% 0% 0% 3% 0% 2% 1% 0% 0%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
13. Which of the following best describes the organization where you currently work?						
Private Practice: More than 75 practitioners Total Company	35	-				4%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 9 District 10	10 2 1 0 0 1 1 5 12 3 0	No valid cases No valid cases No valid cases No valid cases				14% 4% 2% 0% 1% 1% 6% 11% 6% 0% 0%

	Number Responding	0% 25% 50% 75%	100%	Percent Responding
13. Which of the following best describes the organization where you currently work?				
Judicial Chambers (e.g., hearing officer, law clerk) Total Company	15			2%
District 0 District 1		No valid cases		3% 0%
District 2 District 3	2	No valid cases		3% 0%
District 3 District 4 District 5	3			8%
District 6	3			2% 3%
District 7N District 7S	0	No valid cases No valid cases		0% 0%
District 8 District 9	0	No valid cases		2% 0%
District 10	2			2%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
13. Which of the following best describes the organization where you currently work?					I		
Government, public service, or non-profit Total Company	190						21%
District 0 District 1 District 2 District 3 District 3 District 4 District 5 District 5 District 6 District 7N District 7S District 8	7 13 10 11 18 21 16 22 8						29% 12% 22% 16% 28% 21% 19% 18% 20% 15%
District 9 District 10			-				17% 36%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
13. Which of the following best describes the organization where you currently work?			I		I		
In-House (corporate or for-profit) Total Company	74						8%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 9 District 10	3 2 3 1 9 6 11 20 5 8	No valid o					9% 5% 3% 3% 10% 6% 12% 18% 9% 10% 0%

	Number Responding	0% 25% 5	0% 75% 100%	Percent Responding
13. Which of the following best describes the organization where you currently work?				
Law School (professor or administration) Total Company	5	2		1%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 9	1 0 0 1 1 0 1	No valid cases No valid cases No valid cases No valid cases No valid cases No valid cases		1% 2% 0% 0% 0% 1% 1% 0% 2% 0%

	Number Responding	0% 25%	50% 75% 100%	Percent Responding
13. Which of the following best describes the organization where you currently work?			1 1	
Bar administration or lawyer assistance Total Company	1			0%
District 0 District 1 District 2 District 3 District 3 District 4 District 5 District 6 District 7N District 7N District 7S District 8 District 9 District 10	0 0 0 0 1 0 0 0 0	No valid cases No valid cases		0% 0% 0% 0% 0% 1% 0% 0% 0% 0% 0%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
13. Which of the following best describes the organization where you currently work?			·		I		
Other, please specify: Total Company	74						8%
District 0 District 1 District 2 District 3 District 4 District 5 District 5 District 6 District 7N District 7S District 8	9 2 6 7 2 4 8 7 5 5						13% 4% 10% 11% 5% 5% 7% 8% 5% 9%
District 9 District 10			-				18% 6%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
14. Do you have the option to work remotely?			I		I		
Yes, I can work remotely full-time.							
Total Company	404						45%
District 0	41						59%
District 1	31						54%
District 2	24						41%
District 3	26						42%
District 4	8		1				21%
District 5	35			1			41%
District 6	49						45%
District 7N	39						43%
District 7S	51						46%
District 8	26						49%
District 9	44						57%
District 10	30						35%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
14. Do you have the option to work remotely?			,	I	I		
Yes, I can work remotely part-time or on certain days.							
Total Company	/ 397						44%
District	23						33%
District	1 23						40%
District	2 26						44%
District	3 27						44%
District	4 21						54%
District	5 37			-			43%
District	6 49						45%
District 7N	J 41						46%
District 75	53						48%
District	3 22			1			42%
District	28		1				36%
District 10	47						55%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
14. Do you have the option to work remotely?			Ι	I	I		
No, I cannot work remotely.							
Total Company	98						11%
District 0	6						9%
District 1	3						5%
District 2							15%
District 3	9						15%
District 4	10						26%
District 5	14						16%
District 6	11						10%
District 7N	10						11%
District 7S							6%
District 8							9%
District 9							6%
District 10	9						10%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
15. To what extent does your ability (or inability) to work remotely impact your overall wellbeing?			, I		I		
Very positively Total Company	399			-			44%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N	29 29 23 14 31 45						56% 51% 49% 37% 36% 36% 41% 47%
District 7S District 8 District 9 District 10	29 34		4				47% 55% 44% 37%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
15. To what extent does your ability (or inability) to work remotely impact your overall wellbeing?			I		I		
Somewhat positively Total Company	198						22%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7N District 7S District 8 District 9 District 10	12 15 10 14 6 22 27 19 26 7 21						17% 26% 17% 23% 15% 26% 25% 21% 23% 13% 27% 22%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
15. To what extent does your ability (or inability) to work remotely impact your overall wellbeing?			ľ		I		
No impact Total Company	253						28%
District 0 District 1 District 2 District 3 District 4 District 5 District 6	17 12 13 20 17 29			-			24% 21% 22% 32% 44% 34% 28%
District 7N District 7S District 8 District 9 District 10	28 14 19						27% 25% 26% 25% 35%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
15. To what extent does your ability (or inability) to work remotely impact your overall wellbeing?			I	ľ	I		
Somewhat negatively Total Company	39						4%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7N District 7S District 8 District 9 District 10	1 5 4 2 7 5 4 3 3	No val	id cases				0% 2% 8% 6% 2% 6% 6% 4% 6% 4% 3%

	Number Responding	0% 25% 50%	% 75% 100%	Percent Responding
15. To what extent does your ability (or inability) to work remotely impact your overall wellbeing?				
Very negatively Total Company	10			1%
District 0 District 1 District 2 District 3 District 4 District 5 District 6	0 2 1 0 2 0	No valid cases No valid cases No valid cases		3% 0% 3% 2% 0% 2% 0%
District 7N District 7S District 8 District 9 District 10	1 0 0	No valid cases No valid cases No valid cases		0% 1% 0% 0% 2%

	Number Responding	0%	25%	50%	75% 100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.			l	I	,	
Less than 30 Total Company	200					22%
District 0	13		_			19%
District 1 District 2	13 13					23% 22%
District 2 District 3						22%
District 4			-			23%
District 5	19		4			22%
District 6						28%
District 7N						14%
District 7S						13%
District 8						30%
District 9						34%
District 10	19					22%

Number Responding	0%	25%	50%	75%	100%	Percent Responding
		I		I		
75						8%
3 9						4% 16%
6 8						10% 13%
9						13% 10% 6%
6 8						7% 7%
5						6% 6% 8%
	Responding 75 3 9 6 8 5 9 6 6 6 8 3	Responding 0% 75 - 3 - 9 - 6 - 5 - 9 - 6 - 8 - 9 - 6 - 8 - 9 - 6 - 8 - 9 - 6 - 8 - 9 - 6 - 8 - 3 - 3 - 3 - 3 - 3 - 3 -	Responding 0% 25% 75 - - 3 - - 9 - - 6 - - 5 - - 9 - - 6 - - 6 - - 6 - - 6 - - 6 - - 6 - - 6 - - 3 - - 9 - - - 6 - - - 75 - - - 9 - - - 6 - - - 3 - - - - 3 - - - - 5 - - - - 3 - - - - 3 - - - -	Responding 0% 25% 50% 75 -	Responding 0% 25% 50% 75% 75 -	Responding 0% 25% 50% 75% 100% 75 -

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.			I		I		
35-39 Total Company	90						10%
District 0 District 1 District 2 District 3 District 4 District 5 District 6	4 7 3 9 2 6 15						6% 12% 5% 15% 5% 7% 14%
District 7N District 7S District 8 District 9 District 10	9 8 6						12% 8% 15% 8% 12%

	Number Responding	0%	25% 5	0%	75% 100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.			I		1	
40-44 Total Company	194		ı			22%
District 0 District 1 District 2 District 3 District 4 District 5 District 5 District 6 District 7N District 7S District 8	16 10 14 12 12 17 21 18 25 8					23% 18% 24% 19% 31% 20% 19% 20% 23% 15%
District 8 District 9 District 10	17					15% 22% 28%

	Number Responding	0%	25%	50%	75% 100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.			I		I	
45-49 Total Company	141					16%
District 0 District 1 District 2 District 3 District 4	7 10 11					13% 12% 17% 18% 15%
District 5 District 6 District 7N District 7S District 8 District 9 District 10	16 18 23 10 11					12% 15% 20% 21% 19% 14% 12%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.			I		I		
50-59 Total Company	121						13%
District 0 District 1	6						29% 11%
District 2 District 3 District 4	4						14% 6% 10%
District 5 District 6	11						13% 10%
District 7N District 7S District 8	25						16% 23% 9%
District 8 District 9 District 10	6						9% 8% 8%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.				I		
60-69 Total Company	47	-				5%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N	4 2 0 10 8	No valid cases				3% 7% 3% 3% 0% 12% 7% 4%
District 7S District 8 District 9 District 10	3 3 3					3% 6% 4% 7%

	Number Responding	0% 25%	50% 75% 100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.				
70-79 Total Company	12			1%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7N District 7S District 8 District 9 District 10	0 1 0 3 0 3 1 0	No valid cases No valid cases No valid cases No valid cases No valid cases		0% 0% 2% 0% 3% 0% 3% 1% 0% 1% 2%

	Number Responding	0% 25% 50	0% 75% 100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.			1 1	
80-89 Total Company	9			1%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N	1 0 0 1 2 0	No valid cases No valid cases No valid cases No valid cases		1% 2% 0% 0% 1% 2% 0%
District 7S District 8 District 9 District 10	0 2	No valid cases No valid cases		2% 0% 3% 0%

	Number Responding	0% 25% 50	0% 75% 100%	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.				
90-99 Total Company	4			0%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S	0 1 0 1 0 1 0	No valid cases No valid cases No valid cases No valid cases		1% 0% 2% 0% 3% 0% 0% 1% 0%
District 8 District 9 District 10	0	No valid cases No valid cases No valid cases		0% 0% 0%

	Number Responding	0% 25%	50%	75% 100	Percent Responding
16. In the past month, how many hours did you work in an average week? Include billable and non-billable time.				I	
100 or more Total Company	6	1			1%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7N District 7S District 8 District 9 District 10	0 1 0 0 0 2 1 0 0	No valid cases No valid cases No valid cases No valid cases No valid cases No valid cases No valid cases			1% 0% 2% 0% 0% 0% 2% 1% 0% 0% 1%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
17. How many <u><i>billable</i></u> hours do you work on average per week?			I		I		
Less than 20 Total Compar	y 187						21%
District District District	0 9 1 13						13% 23% 22%
District District District	4 6 5 17						26% 15% 20%
District District 7 District 7 District 7	N 20 S 20						24% 22% 18% 25%
District District 1	9 22						29% 14%

		Number Responding	0%	25%	50%	75% 100%	Percent Responding
17. How many <u><i>billable</i></u> hours do you work on average per week?				I		I	
21 to 30		450					470/
	Total Company	152					17%
	District 0			_			10%
	District 1	12					21%
	District 2						20%
	District 3						37%
	District 4						15%
	District 5						14%
	District 6						19%
	District 7N						16%
	District 7S						12%
	District 8						13%
	District 9						18%
	District 10	11					13%

	Number Responding	0%	25%	50%	75% 100%	Percent Responding
17. How many <u><i>billable</i></u> hours do you work on average per week?					I	
31 to 40 Total Compar	y 107					12%
District District District District	1 6 2 6		I			20% 11% 10% 6%
District District District District 7	5 12 6 7 N 19		4			21% 14% 6% 21%
District 7 District District District 1	8 8 9 4					13% 15% 5% 6%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
17. How many <u><i>billable</i></u> hours do you work on average per week?			I		I		
41 to 50 Total Compar	y 57						6%
District District District District District District District District District 7 District 7	1 7 2 4 3 1 4 1 5 4 6 3 N 6						17% 12% 7% 2% 3% 5% 3% 7% 5%
District District District	9 3						9% 4% 7%

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
17. How many <u><i>billable</i></u> hours do you work on average per week?				T		Ι		
More than 50	Total Company	12						1%
	District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 9	0 0 1 0 3 0 1 3 1	No vali No vali	d cases d cases d cases d cases				1% 0% 2% 0% 3% 0% 1% 3% 2% 1%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
17. How many <u><i>billable</i></u> hours do you work on average per week?			I		I		
I do not track billable hours. Total Company	384			1			43%
District 0 District 1 District 2 District 3 District 3 District 4 District 5 District 6 District 7N District 7N District 7S District 8 District 9 District 10	27 19 24 17 18 38 52 30 56 19 33						39% 33% 41% 27% 46% 44% 48% 33% 50% 36% 43% 59%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
19. What is the billable hour expectation?				I		
Less than 1500 hours per year						
Total Company	33					27%
District 0	3					16%
District 1	3					43%
District 2	2					50%
District 3	2		1			40%
District 4	0	No valid cases				0%
District 5	3					30%
District 6	1					13%
District 7N	6					26%
District 7S						23%
District 8	2					22%
District 9						38%
District 10	3	1				43%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
19. What is the billable hour expectation?			I		I		
1501 – 1750 hours per year							
Total Company	37						30%
District 0	8			4			42%
District 1	0	No valid o	cases				0%
District 2	1						25%
District 3	0	No valid o	cases				0%
District 4	0	No valid o	cases				0%
District 5	3		1				30%
District 6	3						38%
District 7N	10						43%
District 7S							23%
District 8	3						33%
District 9	3						38%
District 10	1						14%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
19. What is the billable hour expectation?			1	ľ	I		
1751 – 1850 hours per year							
Total Company	24						19%
District 0	3						16%
District 1	3						43%
District 2	1						25%
District 3	1						20%
District 4	1						50%
District 5	2		-				20%
District 6	2						25%
District 7N	3						13%
District 7S	2						9%
District 8	3						33%
District 9							13%
District 10	2						29%

	Number Responding	0% 25% 50	D% 75% 100%	Percent Responding
19. What is the billable hour expectation?		I		
1851 – 2000 hours per year				
Total Company	18			15%
District 0	4			21%
District 1	1			14%
District 2	0	No valid cases		0%
District 3	1			20%
District 4	0	No valid cases		0%
District 5	1			10%
District 6	0	No valid cases		0%
District 7N	4			17%
District 7S				27%
District 8	1			11%
District 9		No valid cases		0%
District 10	0	No valid cases		0%

	Number Responding	0% 25% 5	0% 75% 100%	Percent Responding
19. What is the billable hour expectation?			1	
2001 – 2200 hours per year				
Total Company	2			2%
District 0	1			5%
District 1	0	No valid cases		0%
District 2	0	No valid cases		0%
District 3	0	No valid cases		0%
District 4	0	No valid cases		0%
District 5	0	No valid cases		0%
District 6	0	No valid cases		0%
District 7N	0	No valid cases		0%
District 7S	1	—		5%
District 8	0	No valid cases		0%
District 9	0	No valid cases		0%
District 10	0	No valid cases		0%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
19. What is the billable hour expectation?				I		
Other, please specify:						
Total Company	10					8%
District 0	0	No valid cases				0%
District 1	0	No valid cases				0%
District 2	0	No valid cases				0%
District 3	1					20%
District 4	1					50%
District 5	1					10%
District 6	2	1				25%
District 7N	0	No valid cases				0%
District 7S	3					14%
District 8	0	No valid cases				0%
District 9	1					13%
District 10	1					14%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
20. How often do billable hour expectations cause you stress?				I		
Every day or nearly every day						
Total Company	19					15%
District 0	6	1				32%
District 1	1					14%
District 2	0	No valid cases				0%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	2					20%
District 6	1					13%
District 7N	2					9%
District 7S						14%
District 8	3					33%
District 9	1					13%
District 10	0	No valid cases				0%

	Number Responding	0% 25% 50	D% 75% 100%	Percent Responding
20. How often do billable hour expectations cause you stress?				
Regularly				
Total Company	34			27%
District 0	8			42%
District 1	2			29%
District 2	0	No valid cases		0%
District 3	2			40%
District 4		No valid cases		0%
District 5	3			30%
District 6	1			13%
District 7N				35%
District 7S				23%
District 8				22%
District 9				38%
District 10	0	No valid cases		0%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
20. How often do billable hour expectations cause you stress?			I	I		
Occasionally						
Total Company	30					24%
District 0	3					16%
District 1	2					29%
District 2	2					50%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	4					40%
District 6	2					25%
District 7N	5					22%
District 7S	4					18%
District 8	2					22%
District 9	4					50%
District 10	2					29%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
20. How often do billable hour expectations cause you stress?			I		1		
Rarely Total Company	26		-				21%
District 0							5%
District 1	1						14%
District 2							25%
District 3				1			40%
District 4							100%
District 5							10%
District 6							13%
District 7N							26%
District 7S							23%
District 8							22%
District 9		No valid	cases				0%
District 10	4						57%

	Number Responding	0% 25% 50	% 75% 100%	Percent Responding
20. How often do billable hour expectations cause you stress?			I	
Never				
Total Company	15			12%
District 0	1	-		5%
District 1	1			14%
District 2	1			25%
District 3	1			20%
District 4	0	No valid cases		0%
District 5	0	No valid cases		0%
District 6	3	1		38%
District 7N	2			9%
District 7S	5			23%
District 8	0	No valid cases		0%
District 9	0	No valid cases		0%
District 10	1			14%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
21. How often do you feel burned out from your work?			Ι	I	I		
Every day or nearly every day							
Total Company	79						9%
District 0	9						13%
District 1	4						7%
District 2	8						14%
District 3							10%
District 4	3						8%
District 5	11						13%
District 6							9%
District 7N	5						6%
District 7S							6%
District 8							9%
District 9							5%
District 10	7						8%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
21. How often do you feel burned out from your work?			I		I		
Regularly							
Total Company	192						21%
District 0	23						33%
District 1	8						14%
District 2	13						22%
District 3	11		l				18%
District 4	9						23%
District 5	18						21%
District 6	15						14%
District 7N							26%
District 7S							26%
District 8			1				19%
District 9							25%
District 10	14						16%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
21. How often do you feel burned out from your work?			I	I	I		
Occasionally							
Total Company	327						37%
District 0	24	,					34%
District 1	21						37%
District 2	16						28%
District 3	27			-			44%
District 4	12						31%
District 5	25						29%
District 6	40						37%
District 7N	44						49%
District 7S	35						32%
District 8	19						36%
District 9	25						33%
District 10	39						45%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
21. How often do you feel burned out from your work?			I	I	I		
Rarely							
Total Company	197	_					22%
District 0	10						14%
District 1	20						35%
District 2	13						22%
District 3	14						23%
District 4	9						23%
District 5	24						28%
District 6	26						24%
District 7N	11						12%
District 7S	25						23%
District 8	11						21%
District 9							22%
District 10	17						20%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
21. How often do you feel burned out from your work?			I		I		
Never							
Total Company	100						11%
District 0	4						6%
District 1	4						7%
District 2	8						14%
District 3	3						5%
District 4	6						15%
District 5	8						9%
District 6	18						17%
District 7N	7						8%
District 7S	14						13%
District 8							15%
District 9							14%
District 10	9						10%

	Number Responding	0%	25%	50%	75% 100%	Percent Responding
22. How often does your employer (or clients if in solo practice) expect you to be available outside of work hours?			I		,	
Always Total Company	137					15%
District 0 District 1 District 2 District 3 District 4	11 4 12 8		•			16% 7% 21% 13% 13%
District 5 District 6 District 7N District 7S District 8 District 9 District 10	13 13 21 9 11					19% 12% 14% 19% 17% 14% 16%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
22. How often does your employer (or clients if in solo practice) expect you to be available outside of work hours?			I		I		
Regularly Total Company	190		-				21%
District 0 District 1	9						27% 16%
District 2 District 3	13						22% 21%
District 4 District 5 District 6	9						28% 10% 23%
District 7N District 7S	18						20% 26%
District 8 District 9	17						30% 22%
District 10	11						13%

22. How often does your employer (or clients if in solo practice) expect you to be available outside of work hours?	Responding
Occasionally Total Company 407	45%
District 0 31 District 1 37 District 2 21 District 3 32 District 4 13 District 5 46 District 6 49 District 7N 47 District 7N 47 District 7S 42 District 8 18 District 9 33	44% 65% 36% 52% 33% 53% 45% 52% 38% 34% 43%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
22. How often does your employer (or clients if in solo practice) expect you to be available outside of work hours?			I		I		
Never Total Company	161						18%
District 0							13%
District 1	7		4				12%
District 2 District 3			-				21% 13%
District 4			1				26%
District 5							17%
District 6			1				20%
District 7N	12						13%
District 7S							16%
District 8							19%
District 9							20%
District 10	23						27%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
23. Have you ever considered leaving the legal profession due to stress, burnout, or mental health issues?			·		I		
Yes Total Company	445			_			50%
District 0					4		66%
District 1	26						46%
District 2	28						48%
District 3	28						46%
District 4	17						44%
District 5	43						50%
District 6	53						49%
District 7N	40						44%
District 7S	63						57%
District 8	24						45%
District 9	36						47%
District 10	41						48%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
23. Have you ever considered leaving the legal profession due to stress, burnout, or mental health issues?			I		I		
No Total Company	378						42%
District 0 District 1	16 27			_			23% 47%
District 2 District 3	28						45% 46%
District 4 District 5 District 6	35						49% 41% 42%
District 7N District 7S	38		1				42% 39%
District 8 District 9	36						53% 47%
District 10	36						42%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
23. Have you ever considered leaving the legal profession due to stress, burnout, or mental health issues?			I		I		
Maybe Total Company	72						8%
District 0 District 1	4						11% 7%
District 2 District 3 District 4	5						7% 8% 8%
District 5 District 6	10						9% 9% 13%
District 7N District 7S District 8	4						13% 4% 2%
District 9 District 10							5% 10%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
24. How often do you feel stressed by your financial situation?			I		I		
Every day or nearly every day							
Total Company	70						8%
District 0	10						14%
District 1	5						9%
District 2							9%
District 3	5						8%
District 4	4						10%
District 5		-					5%
District 6							9%
District 7N							6%
District 7S							8%
District 8		1					2%
District 9							8%
District 10	6						7%

	Number Responding	0%	25%	50%	75% 100%	Percent Responding
24. How often do you feel stressed by your financial situation?			I		I	
Regularly Total Company	140					16%
District 0						20%
District 1	5					9%
District 2						17%
District 3						13%
District 4						8%
District 5						17%
District 6						15%
District 7N						28%
District 7S						15%
District 8						11%
District 9						12%
District 10	13					15%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
24. How often do you feel stressed by your financial situation?			I	I	I		
Occasionally							
Total Company	261						29%
District 0	23						33%
District 1	16						28%
District 2	14						24%
District 3	16						26%
District 4	9						23%
District 5	31		1				36%
District 6	29						27%
District 7N	23						26%
District 7S	28						25%
District 8	19						36%
District 9							38%
District 10	24						28%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
24. How often do you feel stressed by your financial situation?			I	I	I		
Rarely							
Total Company	273						31%
District 0	15						21%
District 1	22						39%
District 2	18						31%
District 3	24		1				39%
District 4	11						28%
District 5	24						28%
District 6	30						28%
District 7N							28%
District 7S	37						34%
District 8	19						36%
District 9							24%
District 10	30						35%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
24. How often do you feel stressed by your financial situation?			I		I		
Never							
Total Company	151						17%
District 0	8						11%
District 1	9						16%
District 2	11						19%
District 3	8						13%
District 4	12						31%
District 5	12						14%
District 6	24						22%
District 7N							13%
District 7S							18%
District 8							15%
District 9							18%
District 10	13						15%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
25. Have financial concerns ever caused you to consider leaving the legal profession?			T		I		
Yes Total Company	167		•				19%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8	19 5 12 10 6 20 22 16 22						27% 9% 21% 16% 15% 23% 20% 18% 20% 11%
District 9 District 10	13		l •				17% 19%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
25. Have financial concerns ever caused you to consider leaving the legal profession?			I				
No Total Company	683						76%
District 0 District 1				_	4	-	66% 89%
District 2 District 3	49			_			78% 80%
District 4 District 5 District 6	62						82% 72% 73%
District 7N District 7S	69 87						77% 79%
District 8 District 9 District 10	57						77% 75% 74%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
25. Have financial concerns ever caused you to consider leaving the legal profession?			I	ľ	I		
Maybe Total Company	45						5%
District 0 District 1 District 2 District 3	1 1						7% 2% 2% 3%
District 4 District 5 District 6	1 4 7						3% 5% 6%
District 7N District 7S District 8 District 9 District 10	1 6 6						6% 1% 11% 8% 7%

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
26. Did you graduate law school with student loan debt?				I		I		
Yes								
	Total Company	690						77%
	District 0	54						77%
	District 1	43						75%
	District 2				_			72%
	District 3							75%
	District 4						-	92%
	District 5							79%
	District 6							71%
	District 7N							79%
	District 7S							75%
	District 8				_			75%
	District 9							76%
	District 10	72						84%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
26. Did you graduate law school with student loan debt?			I		I		
No Total Company	201						22%
District 0							23%
District 1							25%
District 2							28%
District 3	15						25%
District 4	3						8%
District 5	5 17						20%
District 6	32						29%
District 7N	19						21%
District 7S	26						24%
District 8	13						25%
District 9	17						22%
District 10	13						15%

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
26. Did you graduate law school with student loan debt?				Ι		Ι		
Did not attend law school								
Total C	ompany	4						0%
[District 0	0	No valid	cases				0%
[District 1	0	No valid	cases				0%
[District 2	0	No valid	cases				0%
[District 3	0	No valid	cases				0%
[District 4	0	No valid	cases				0%
[[District 5	1	1					1%
[[District 6	0	No valid	cases				0%
Di	strict 7N	0	No valid	cases				0%
Di	strict 7S	1						1%
[District 8	0	No valid	cases				0%
]	District 9	1						1%
Di	istrict 10	1						1%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
27. How much debt did you have upon graduation?			I		1		
Less than \$20,000							
Total Company	129						19%
District 0	6						11%
District 1	10						23%
District 2	8		1				19%
District 3	10						22%
District 4	8						22%
District 5	8						12%
District 6							23%
District 7N							23%
District 7S	15						18%
District 8							25%
District 9							16%
District 10	11						15%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
27. How much debt did you have upon graduation?			I	1	I		
\$20,001 to \$50,000							
Total Company	171						25%
District 0	7						13%
District 1	12						28%
District 2	10						24%
District 3	11						24%
District 4	15						42%
District 5	17						25%
District 6	19						25%
District 7N	16						23%
District 7S	15		1				18%
District 8	12						30%
District 9	19						33%
District 10	18						25%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
27. How much debt did you have upon graduation?			I	I	I		
\$50,001 to \$100,000							
Total Company	169						24%
District 0	19						35%
District 1	6						14%
District 2							40%
District 3							20%
District 4	9						25%
District 5	21						31%
District 6	15		1				19%
District 7N	12						17%
District 7S	18						22%
District 8	8						20%
District 9	15						26%
District 10	20						28%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
27. How much debt did you have upon graduation?			I		1		
\$100,001 to \$150,000							
Total Company	101						15%
District 0	9						17%
District 1	7						16%
District 2	3						7%
District 3	10						22%
District 4		-					3%
District 5	13		1				19%
District 6							12%
District 7N							15%
District 7S							18%
District 8	7		1				18%
District 9							9%
District 10	11						15%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
27. How much debt did you have upon graduation?			I	1	1		
More than \$150,000							
Total Company	103						15%
District 0	13						24%
District 1	8		4				19%
District 2							5%
District 3							11%
District 4							6%
District 5	7						10%
District 6	11						14%
District 7N			l				18%
District 7S							22%
District 8	3						8%
District 9							17%
District 10	11						15%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
27. How much debt did you have upon graduation?				I		
Prefer not to disclose						
Total Company	17					2%
District 0	0	No valid cases				0%
District 1	0	No valid cases				0%
District 2	2					5%
District 3	1					2%
District 4	1	-				3%
District 5		-				3%
District 6	5					6%
District 7N						4%
District 7S	2	1				2%
District 8	0	No valid cases				0%
District 9	0	No valid cases				0%
District 10	1					1%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
28. To what extent has student loan debt negatively affected your mental wellbeing?			I		I		
Not at all Total Company	326						47%
District 0 District 1 District 2 District 3 District 4 District 5 District 5 District 6 District 7N District 7S District 8 District 8	18 25 23 20 27 27 39 34 36 23				4		33% 58% 55% 43% 75% 40% 51% 48% 43% 58%
District 9 District 10							45% 39%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
28. To what extent has student loan debt negatively affected your mental wellbeing?			'		·		
Somewhat Total Company	245						36%
District 0 District 1 District 2 District 3 District 4	24 14 12 18			•			44% 33% 29% 39% 14%
District 5 District 6 District 7N District 7S District 8 District 9 District 10	26 21 28 11 25						43% 34% 30% 34% 28% 43% 44%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
28. To what extent has student loan debt negatively affected your mental wellbeing?			ľ		I		
Significantly Total Company	119						17%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S	4 7 8 4 12 12 16 19						22% 9% 17% 17% 11% 18% 16% 23% 23%
District 8 District 9 District 10	7						15% 12% 17%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
29. Have you ever wanted to make a job or career change, but did not because of your student loan debt?			I	ľ	I		
Yes Total Company	183						27%
District 0 District 1	7						35% 16%
District 2 District 3 District 4	13						14% 28% 22%
District 5 District 6	21						31% 26%
District 7N District 7S	29						27% 35%
District 8 District 9 District 10	15						20% 26% 25%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
29. Have you ever wanted to make a job or career change, but did not because of your student loan debt?			I		I		
No Total Company	461						67%
District 0 District 1 District 2 District 3 District 4 District 5	31 30 29 27						59% 72% 71% 63% 75% 65%
District 6 District 7N District 7S District 8 District 9 District 10	50 48 50 30 41						65% 68% 60% 75% 71% 68%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
29. Have you ever wanted to make a job or career change, but did not because of your student loan debt?			I		I		
Maybe Total Company	46						7%
District 0 District 1	5						6% 12%
District 2 District 3	4						14% 9%
District 4 District 5 District 6	3						3% 4% 9%
District 7N District 7S	4 4						6% 5%
District 8 District 9	2						5% 3% 7%
District 9 District 10							3% 7%

Number Responding	0%	25%	50%	75%	100%	Percent Responding
		I		I		
77						9%
4 5						6% 9%
7 6						12% 10%
9						13% 10% 5%
3 11						3% 10%
11						9% 14% 7%
	Responding 777 4 5 7 6 5 9 5 3 11 5	Responding 0% 77 9 4 9 5 9 5 9 5 3 111 1 5 1 11 1	Responding 0% 25% 77 - - 4 - - 5 - - 7 - - 6 - - 5 - - 9 - - 5 - - 3 - - 11 - - 5 - - 11 - -	Responding 0% 25% 50% 77 -	Responding 0% 25% 50% 75% 77 -	Responding 0% 25% 50% 75% 100% 77 100

Number Responding	0%	25%	50%	75%	100%	Percent Responding
		·		I		
75						8%
7 5						10% 9%
2						12% 3% 8%
4						8% 5% 8%
9 14						10% 13%
5						8% 7% 7%
	Responding 75 7 5 7 2 3 4 9 9 9 14 4	Responding 0% 75	Responding 0% 25% 75	Responding 0% 25% 50% 70 1 1 1 75 - 1 1 75 - 1 1 75 - 1 1 76 - 1 1 77 - 1 1 78 - 1 1 79 - 1 1 10 - 1 1 9 - 1 1 9 - 1 1 9 - - 1 9 - - 1 14 - - 1 4 - - 1 5 - - 1 1	Responding 0% 25% 50% 75% 7 1 1 1 1 75 - - 1 1 75 - - 1 1 75 - - 1 1 75 - - 1 1 76 - - 1 1 1 76 - - 1	Responding 0% 25% 50% 75% 100% 75 -

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
30. During the past 7 days, how many days did you engage in physical activity for at least 20 minutes?			I		I		
2 days Total Company	146						16%
District 0 District 1	10						21% 18%
District 2 District 3 District 4	7						12% 11% 26%
District 5 District 6	16		1				19% 15%
District 7N District 7S	14		4				20% 13%
District 8 District 9 District 10	9						8% 12% 23%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
30. During the past 7 days, how many days did you engage in physical activity for at least 20 minutes?			I		I		
3 days Total Company	117						13%
District 0 District 1	9 8						13% 14%
District 2 District 3	8						12% 13%
District 4 District 5 District 6	7						13% 8% 16%
District 7N District 7S	12						13% 11%
District 8 District 9	11						17% 14%
District 10	12						14%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
30. During the past 7 days, how many days did you engage in physical activity for at least 20 minutes?			I		I		
4 days Total Company	118						13%
District 0							11%
District 1	10						18%
District 2	6						10%
District 3	10						16%
District 4	5						13%
District 5	12						14%
District 6							12%
District 7N							13%
District 7S							13%
District 8							23%
District 9							8%
District 10	10						12%

Number Responding	0%	25%	50%	75%	100%	Percent Responding
		I		I		
109						12%
6 7						9% 12%
10						12% 16%
16		1				8% 19% 12%
11 11						12% 10%
11						11% 14% 9%
	Responding 109 6 7 7 10 3 16 13 11 11 6	Responding 0% 109	Responding 0% 25% 109	Responding 0% 25% 50% 109	Responding 0% 25% 50% 75% 109 -	Responding 0% 25% 50% 75% 100% 109

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
30. During the past 7 days, how many days did you engage in physical activity for at least 20 minutes?			,		I		
6 days Total Company	79						9%
District 0 District 1	4						9% 7%
District 2 District 3 District 4	7						12% 11% 8%
District 4 District 5 District 6	6						8% 7% 12%
District 7N District 7S	8 7						9% 6%
District 8 District 9 District 10	8						6% 11% 8%

Number Responding	0%	25%	50%	75%	100%	Percent Responding
		I	I	I		
173						19%
15 8						21% 14%
11						17% 18%
16		4				13% 19% 21%
16 27						18% 25%
15						19% 20% 20%
	Responding 173 15 8 10 11 5 16 23 16 27 10	Responding 0% 173	Responding 0% 25% 173	Responding 0% 25% 50% 173	Responding 0% 25% 50% 75% 173	Responding 0% 25% 50% 75% 100% 173

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
31. How many hours of sleep do you get on an average night?		I		I		
Less than 4						
Total Company	0	No valid cases				0%
District 0	0	No valid cases				0%
District 1	0	No valid cases				0%
District 2	0	No valid cases				0%
District 3	0	No valid cases				0%
District 4	0	No valid cases				0%
District 5	0	No valid cases				0%
District 6	0	No valid cases				0%
District 7N	0	No valid cases				0%
District 7S	0	No valid cases				0%
District 8	0	No valid cases				0%
District 9	0	No valid cases				0%
District 10	0	No valid cases				0%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
31. How many hours of sleep do you get on an average night?			I		I		
About 4							
Total Company	22						2%
District 0	3						4%
District 1	4						7%
District 2	3						5%
District 3	1						2%
District 4	1	-					3%
District 5	3	-					3%
District 6	1						1%
District 7N	1						1%
District 7S	1						1%
District 8	1						2%
District 9	2						3%
District 10	1						1%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
31. How many hours of sleep do you get on an average night?			I	I	I		
About 5	80						0%
Total Company							9%
District 0							11%
District 1	2						4%
District 2							10%
District 3							11%
District 4			4				18%
District 5							6%
District 6	11						10%
District 7N							12%
District 7S							3%
District 8	5						9%
District 9	7						9%
District 10	8						9%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
31. How many hours of sleep do you get on an average night?			Ι		I		
About 6 Total Company	236	J					26%
District 0							26%
District 1	15						26%
District 2							26%
District 3							21%
District 4	10						26%
District 5	26						30%
District 6	29						27%
District 7N							22%
District 7S							29%
District 8							28%
District 9							20%
District 10	28						33%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
31. How many hours of sleep do you get on an average night?			·	I	I		
About 7							
Total Company	338						38%
District 0	29						41%
District 1	25						44%
District 2	24						41%
District 3	24						39%
District 4	14						36%
District 5	32						37%
District 6	40						37%
District 7N	37						42%
District 7S	43						39%
District 8	18						34%
District 9							33%
District 10	27						31%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
31. How many hours of sleep do you get on an average night?			I	I	I		
About 8 Total Company	179						20%
District 0 District 1	12 10						17% 18%
District 2							14%
District 3							25%
District 4							18%
District 5							17%
District 6							23%
District 7N							17%
District 7S							25%
District 8							21%
District 9							25%
District 10	15						17%

	Number Responding	0% 25% 50	D% 75% 100%	Percent Responding
31. How many hours of sleep do you get on an average night?				
More than 8				10/
Total Company	39			4%
District 0	0	No valid cases		0%
District 1	1			2%
District 2				3%
District 3	1			2%
District 4	0	No valid cases		0%
District 5	5			6%
District 6	3	—		3%
District 7N	5			6%
District 7S	4	—		4%
District 8	3			6%
District 9	8			11%
District 10	7			8%

	Number Responding	0%	25%	50%	75% 100%	Percent Responding
32. How often do you wake up feeling rested and restored?			I			
Never						
Total Compar	iy 41					5%
District	0 4					6%
District	1 3					5%
District						5%
District	3 3					5%
District	4 2	_				5%
District	5 4					5%
District	6 4					4%
District 7	N 7					8%
District 7	S 4					4%
District		1				2%
District						4%
District 7	0 3					3%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
32. How often do you wake up feeling rested and restored?			I		I		
Rarely							
Total Compar	iy 190						21%
District	0 20						29%
District	1 6						11%
District	2 11						19%
District	3 15						25%
District	4 10						26%
District	5 18						21%
District	6 23						21%
District 7	N 18						20%
District 7							19%
District	8 9						17%
District							17%
District 7	0 26						30%

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
32. How often do you wake up feeling rested and restored?					1	I		
Sometimes								
Т	otal Company	324						36%
	District 0	29						41%
	District 1	29						51%
	District 2	23						40%
	District 3	19						31%
	District 4	11						28%
	District 5	31		1				36%
	District 6	38						35%
	District 7N							39%
	District 7S							29%
	District 8							28%
	District 9							41%
	District 10	31						36%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
32. How often do you wake up feeling rested and restored?			I	I	I		
Regularly							
Total Compan	y 318						36%
District	0 16						23%
District	1 18						32%
District	2 20						34%
District							38%
District							41%
District	5 32						37%
District							38%
District 7							29%
District 7							46%
District	8 24						45%
District							34%
District 1	0 25						29%

		Number Responding	0%	25%	50%	75%	100%	Percent Responding
32. How often do you wake up feeling rested and restored?				1		Ι		
Always								
Total	l Company	21						2%
	District 0	1						1%
	District 1	1	1					2%
	District 2	1	1					2%
	District 3	1						2%
	District 4	0	No valid	l cases				0%
	District 5	1						1%
	District 6							3%
	District 7N							3%
	District 7S	2	1					2%
	District 8							8%
	District 9							4%
	District 10	1						1%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
33. Which of the following activities do you do to support your mental health and wellbeing? Check all that apply.			I		I		
Meditation Total Company	196						22%
District 0 District 1 District 2	15						30% 26% 24%
District 3 District 4 District 5	17 4						28% 10% 22%
District 6 District 7N District 7S	22 16						20% 18% 25%
District 8 District 9 District 10	7 19						13% 25% 16%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
33. Which of the following activities do you do to support your mental health and wellbeing? Check all that apply.			I				
Therapy, counseling, or group supports Total Company	188						21%
District 0 District 1 District 2 District 3 District 4 District 5	15 12 16 3						21% 26% 21% 26% 8% 21%
District 5 District 6 District 7N District 7S District 8 District 9 District 10	15 24 29 7 16						21% 14% 27% 26% 13% 21% 21%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
33. Which of the following activities do you do to support your mental health and wellbeing? Check all that apply.			I		I		
Physical exercise or active hobby (gardening, dancing, etc.) Total Company	715			_			80%
District 0 District 1				_			83% 86%
District 2 District 3	45			_			74% 74%
District 4 District 5	70						72% 81%
District 6 District 7N District 7S	79					-	80% 89% 70%
District 7S District 8 District 9	41						79% 77% 76%
District 10							81%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
33. Which of the following activities do you do to support your mental health and wellbeing? Check all that apply.			I		I		
Prescription medication Total Company	207						23%
District 0							31%
District 1	13						23%
District 2							22%
District 3 District 4							26% 26%
District 4			-				20%
District 6			_				18%
District 7N							29%
District 7S			-				20%
District 8							17%
District 9	17						22%
District 10	21						24%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
33. Which of the following activities do you do to support your mental health and wellbeing? Check all that apply.			I		I		
Supplements, vitamins, or over-the-counter medications Total Company	346						39%
District 0 District 1	21			-			43% 37%
District 2 District 3 District 4	26		1	-			48% 43% 36%
District 5 District 6 District 7N	37						45% 34% 36%
District 7S District 8	45 19			1			41% 36%
District 9 District 10				-			24% 43%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
33. Which of the following activities do you do to support your mental health and wellbeing? Check all that apply.			I		I		
Other: Total Company	168		1				19%
District 0 District 1	13 10		I				19% 18%
District 2 District 3	17						19% 28%
District 4 District 5	21						26% 24%
District 6 District 7N District 7S	19						20% 21% 17%
District 8 District 9	6						11% 13%
District 10							12%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
33. Which of the following activities do you do to support your mental health and wellbeing? Check all that apply.			I		I		
I am not doing any activities to support my mental health. Total Company	65						7%
District 0 District 1	2						7% 4%
District 2 District 3 District 4	2						12% 3% 10%
District 4 District 5 District 6	6						7% 10%
District 7N District 7S	2 9						2% 8%
District 8 District 9 District 10	6						13% 8% 5%

	Number Responding	0% 25%	5 5	0%	75% 100%	Percent Responding
34. In the past month, how often have you felt sad, depressed, or hopeless?						
Every day or nearly every day Total Company	39					4%
District 0 District 1 District 2	0 4	No valid cases	3			6% 0% 7%
District 3 District 4 District 5	3 5					3% 8% 6%
District 6 District 7N District 7S	1 8					3% 1% 7% 2%
District 8 District 9 District 10	3					2% 4% 6%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
34. In the past month, how often have you felt sad, depressed, or hopeless?			I	ľ	I		
Regularly Total Company	101						11%
District 0 District 1 District 2 District 3 District 4 District 5	9 4 8 2						16% 16% 7% 13% 5% 13%
District 3 District 6 District 7N District 7S District 8 District 9 District 10	11 17 10 3 9		4				10% 19% 9% 6% 12% 7%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
34. In the past month, how often have you felt sad, depressed, or hopeless?			I		I		
Occasionally Total Company	242						27%
District 0 District 1 District 2	14						30% 25% 28%
District 3 District 4 District 5	18 7						30% 18% 26%
District 6 District 7N	31 21						28% 24%
District 7S District 8 District 9	17 17						30% 32% 22%
District 10	25						29%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
34. In the past month, how often have you felt sad, depressed, or hopeless?			I	I	Γ		
Rarely Total Company	312						35%
District 0 District 1	25 19		1				36% 33%
District 2 District 3	21						36% 33%
District 4 District 5							33% 33%
District 6 District 7N	37		1				29% 42%
District 7S District 8	20						33% 38%
District 9 District 10							38% 37%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
34. In the past month, how often have you felt sad, depressed, or hopeless?			I		I		
Never Total Company	200		-				22%
District 0							13%
District 1	15						26%
District 2							22%
District 3							21%
District 4 District 5							36% 23%
District 5							23 %
District 7N							15%
District 7S			-				21%
District 8							23%
District 9							24%
District 10	18						21%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
35. In the past month, how often have you felt nervous, on edge, worried or panic?			I		I		
Every day or nearly every day Total Company	71						8%
District 0 District 1 District 2 District 3 District 4 District 5 District 5 District 6 District 7N District 7S District 8 District 9	8 3 2 3 5 7 7 9 11 2						11% 5% 3% 5% 13% 8% 6% 10% 10% 4% 7%

	Number Responding	0%	25%	50%	75% 100%	Percent Responding
35. In the past month, how often have you felt nervous, on edge, worried or panic?			l	I	I	
Regularly Total Company	166					19%
District 0 District 1	20 11					29% 19%
District 1 District 2						19%
District 3						21%
District 4 District 5						13% 16%
District 6						13%
District 7N						22%
District 7S						18%
District 8 District 9			1			9% 20%
District 3 District 10						20%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
35. In the past month, how often have you felt nervous, on edge, worried or panic?			I		I		
Occasionally Total Company	271						30%
District 0 District 1 District 2	19						26% 33% 33%
District 3 District 4	22 8						36% 21%
District 5 District 6 District 7N	32 29						36% 29% 33%
District 7S District 8 District 9	19						27% 36% 24%
District 10	26						30%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
35. In the past month, how often have you felt nervous, on edge, worried or panic?			I		I		
Rarely Total Company	246						28%
District 0 District 1	17 12						24% 21%
District 1 District 2							21%
District 3							18%
District 4							33%
District 5 District 6							35% 29%
District 7N							29%
District 7S							26%
District 8							34%
District 9			1				28%
District 10	20						23%

	Number Responding	0%	25% 5	50%	75% 100%	Percent Responding
35. In the past month, how often have you felt nervous, on edge, worried or panic?					I	
Never Total Company	140					16%
District 0 District 1	7 12		1			10% 21%
District 1 District 2			-			17%
District 3 District 4						20% 21%
District 4 District 5			•			21% 5%
District 6			4			22%
District 7N District 7S						6% 18%
District 8						17%
District 9 District 10						22% 14%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
37. In the past 12 months, have you had suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm?			I		I		
Yes Total Company	73						10%
District 0 District 1	5 4						8% 9%
District 2 District 3	5						17% 9%
District 4 District 5 District 6	9						6% 13% 9%
District 7N District 7S	8						11% 8%
District 8 District 9	7						5% 11%
District 10	8						11%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
37. In the past 12 months, have you had suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm?					I		
No Total Company	644			_		1	87%
District 0 District 1	58 41			_			92% 91%
District 2 District 3				_			81% 83%
District 4 District 5	53			_	1		94% 78%
District 6 District 7N	62			_			90% 85%
District 7S District 8 District 9	40						88% 95% 88%
District 9 District 10							86%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
37. In the past 12 months, have you had suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm?				Ι		
Prefer not to disclose Total Company	22	2				3%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7N District 7S District 8 District 9 District 10	0 1 4 0 6 1 3 4 0 1	No valid cases No valid cases No valid cases No valid cases				0% 0% 2% 7% 0% 9% 1% 4% 4% 0% 2% 3%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
38. To what extent do you feel your work environment contributed to these thoughts or actions?			l		I		
Significantly contributed Total Company	27						37%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S	1 5 1 5 3 4						40% 25% 63% 20% 50% 56% 38% 50% 29%
District 8 District 9 District 10	1	No valid	cases				0% 14% 25%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
38. To what extent do you feel your work environment contributed to these thoughts or actions?			I		I		
Somewhat contributed Total Company	34			_			47%
District 0							40%
District 1	2			_			50%
District 2							13%
District 3							40%
District 4							50%
District 5	3						33%
District 6	4						50%
District 7N	4						50%
District 7S	4						57%
District 8	1						50%
District 9	4						57%
District 10	6						75%

	Number Responding	0% 25% 5	50% 75% 100%	Percent Responding
38. To what extent do you feel your work environment contributed to these thoughts or actions?				
Did not contribute at all Total Company	10			14%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 9	1 0 2 0 1 1 0 1 1	No valid cases No valid cases No valid cases		20% 25% 0% 40% 0% 11% 13% 0% 14% 50% 29%
District 9 District 10		No valid cases		29% 0%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
38. To what extent do you feel your work environment contributed to these thoughts or actions?						
Prefer not to disclose Total Company	2	2				3%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7N District 7S District 8 District 9 District 10	0 2 0 0 0 0 0 0 0 0	No valid cases No valid cases				0% 0% 25% 0% 0% 0% 0% 0% 0% 0%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
39. Do you ever feel concerned about how much or how often you drink alcohol?			T		Ι		
Yes Total Company	182						20%
District 0 District 1 District 2 District 3 District 4 District 5 District 6	10 11 12 5 22 19						17% 18% 19% 20% 13% 26% 17%
District 7N District 7S District 8 District 9 District 10	26 10 17						26% 24% 19% 22% 17%

Number Responding	0%	25%	50%	75%	100%	Percent Responding
		I		I		
500						56%
40 35						57% 61%
27 33						47% 54% 77%
36						77% 42% 55%
49 67						55% 61%
46						51% 61% 58%
	Responding 500 40 35 27 33 30 36 60 49 67 27	Responding 0% 500	Responding 0% 25% 500	Responding 0% 25% 50% 500	Responding 0% 25% 50% 75% 500	Responding 0% 25% 50% 75% 100% 500

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
39. Do you ever feel concerned about how much or how often you drink alcohol?			I		I		
I do not drink alcohol Total Company	194						22%
District 0 District 1 District 2 District 3 District 4 District 5 District 6	10 17 15 4 26 29						21% 18% 30% 25% 10% 30% 27%
District 7N District 7S District 8 District 9 District 10	16 16 12						16% 15% 30% 16% 23%

	Number Responding	0% 25% 50% 75% 100%	Percent Responding
39. Do you ever feel concerned about how much or how often you drink alcohol?			
Prefer not to disclose Total Company	17	р	2%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8	2 2 1 0 2 1 3 1	No valid cases	4% 4% 2% 0% 2% 1% 3% 1% 0%
District 9 District 10			1% 1%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
40. In the past 12 months, has anyone expressed concern about your use of alcohol?			I		I		
Yes Total Company	60						7%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N	0 3 4 2 8 5	No vali	d cases				7% 0% 5% 7% 5% 9% 5% 13%
District 7S District 8 District 9 District 10	4 3 7						4% 6% 9% 8%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
40. In the past 12 months, has anyone expressed concern about your use of alcohol?			I		I		
No Total Company	665						74%
District 0 District 1 District 2 District 3 District 3 District 4 District 5 District 5 District 6 District 7N District 7S District 8 District 9	49 46 37 45 35 59 79 65 91 38 59					4	74% 70% 81% 65% 74% 90% 69% 72% 73% 83% 72% 78%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
40. In the past 12 months, has anyone expressed concern about your use of alcohol?			Ţ	ľ	I		
I do not drink alcohol Total Company	162		1				18%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 8	10 16 11 2 18 25 12 15 12						21% 18% 28% 18% 21% 23% 13% 14% 23% 12%

	Number Responding	0% 25%	50% 75%	100%	Percent Responding
40. In the past 12 months, has anyone expressed concern about your use of alcohol?					
Prefer not to disclose Total Company	6	1			1%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8	1 1 1 0 1 0 0 0 0	No valid cases No valid cases No valid cases No valid cases No valid cases			1% 2% 2% 0% 1% 0% 0% 0%
District 9 District 10		No valid cases			1% 0%

	Number Responding	0%	25%	50%	75% 100 ⁴	Percent Responding
41. In the past 12 months, have you used drugs other than those prescribed for a current medical condition (i.e., recreational use)?			I			
Yes Total Company	120					13%
District 0 District 1	12 7					17% 12%
District 1 District 2						12%
District 3	5					8%
District 4						10%
District 5						16%
District 6						9%
District 7N						11%
District 7S			1			20%
District 8						19%
District 9						13%
District 10	9					10%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
41. In the past 12 months, have you used drugs other than those prescribed for a current medical condition (i.e., recreational use)?			I		I		
No Total Company	745						83%
District 0 District 1							81% 84%
District 2 District 3	48			_	1	1	84% 87%
District 4 District 5	66						90% 77%
District 6 District 7N District 7S	76			_			91% 85% 77%
District 8 District 9	43						81% 80%
District 10							86%

	Number Responding	0% 25% 50)% 75% 100%	Percent Responding
41. In the past 12 months, have you used drugs other than those prescribed for a current medical condition (i.e., recreational use)?				
Prefer not to disclose Total Company	28			3%
District 0 District 1 District 2 District 3 District 4 District 5 District 5 District 6 District 7N District 7S District 8	2 2 3 0 6 0 3 3	No valid cases No valid cases No valid cases		1% 4% 5% 0% 7% 0% 3% 3% 0%
District 9 District 10	5			7% 3%

	Number Responding	0%	25%	50%	75% 100%	Percent Responding
42. Do you ever feel concerned about how much or how often you use drugs recreationally?			I		I	
Yes Total Company	25					21%
District 0						25%
District 1	0	No valid ca	ses			0%
District 2						14%
District 3		No valid ca				0%
District 4		No valid ca	ses			0%
District 5						21%
District 6						30%
District 7N	3					30%
District 7S	6					27%
District 8	1					10%
District 9	4					40%
District 10	1					11%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
42. Do you ever feel concerned about how much or how often you use drugs recreationally?			I		I		
No Total Company	92						77%
Total Company							
District 0	9 7						75%
District 1 District 2							100%
District 2 District 3				_			86% 100%
District 3				_			75%
District 4							79%
District 6							70%
District 7N							70%
District 7S							68%
District 8							90%
District 9							60%
District 10					1		78%

		0% 25% 50	% 75% 100%	Percent Responding
42. Do you ever feel concerned about how much or how often you use drugs recreationally?				
Prefer not to disclose Total Company	3			3%
District 0 District 1 District 2 District 3 District 4	0 0 0 0	No valid cases No valid cases No valid cases No valid cases		0% 0% 0% 0%
District 4 District 5 District 6 District 7N District 7S District 8 District 9	0 0 0 1 0 0	No valid cases No valid cases No valid cases No valid cases No valid cases		25% 0% 0% 5% 0% 0%

	Number Responding	0% 25% 50	0% 75% 100%	Percent Responding
43. In In the past 12 months, has anyone expressed concern about your use of recreational drugs?				
Yes Total Company	9			8%
District 0 District 1 District 2 District 3	0 1 0	No valid cases		8% 0% 14% 0%
District 4 District 5 District 6 District 7N	1 0 1	No valid cases		25% 7% 0% 10%
District 7S District 8 District 9 District 10	0 3	No valid cases No valid cases		0% 0% 30% 11%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
43. In In the past 12 months, has anyone expressed concern about your use of recreational drugs?			I		I		
No Total Company	110						92%
District 0 District 1	11			_			92% 100%
District 2 District 3 District 4	5			_		(86% 100% 75%
District 4 District 5 District 6	13			_			93% 100%
District 7N District 7S District 8	21						90% 95% 100%
District 9 District 10	7					-	70% 89%

	Number Responding	0% 25% 50	0% 75% 100%	Percent Responding
43. In In the past 12 months, has anyone expressed concern about your use of recreational drugs?				
Prefer not to disclose Total Company	1			1%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8	0 0 0 0 0 0 1	No valid cases No valid cases		0% 0% 0% 0% 0% 0% 5% 0%
District 9 District 10	0	No valid cases No valid cases		0% 0%

	Number Responding	0% 25%	50%	75% 100%	Percent Responding
44. To what extent do you agree with the following statement: The stress of my job and/or the culture at my workplace cause me to drink alcohol or use recreational drugs more than I otherwise would.					
Strongly agree					
Total Company	47				5%
District 0	6				9%
District 1	0	No valid cases			0%
District 2	3				5%
District 3	4				7%
District 4	0	No valid cases			0%
District 5	4				5%
District 6					5%
District 7N					9%
District 7S					10%
District 8		—			4%
District 9					4%
District 10	1	9			1%

	Number Responding	0%	25% 5	50%	75% 100%	Percent Responding
44. To what extent do you agree with the following statement: The stress of my job and/or the culture at my workplace cause me to drink alcohol or use recreational drugs more than I otherwise would.			1	I	1	
Somewhat agree						
Total Company	135					15%
District 0	9					13%
District 1	12		1			21%
District 2	10					18%
District 3	5					8%
District 4	2					5%
District 5	18		1			21%
District 6						15%
District 7N						18%
District 7S						13%
District 8						15%
District 9						14%
District 10	14					16%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
44. To what extent do you agree with the following statement: The stress of my job and/or the culture at my workplace cause me to drink alcohol or use recreational drugs more than I otherwise would.			I		I		
Neither agree nor disagree							
Total Company	118						13%
District 0	15		1				21%
District 1	3						5%
District 2	8						14%
District 3	10						16%
District 4	4						10%
District 5	7						8%
District 6	13						12%
District 7N	14						16%
District 7S							13%
District 8							13%
District 9							13%
District 10	13						15%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
44. To what extent do you agree with the following statement: The stress of my job and/or the culture at my workplace cause me to drink alcohol or use recreational drugs more than I otherwise would.			I		I		
Somewhat disagree							
Total Company	90						10%
District 0	8						11%
District 1	3						5%
District 2	4						7%
District 3	5						8%
District 4	5						13%
District 5	9						10%
District 6							9%
District 7N							11%
District 7S							15%
District 8							6%
District 9							11%
District 10	8						9%

	Number Responding	0%	25%	50%	75% 100%	Percent Responding
44. To what extent do you agree with the following statement: The stress of my job and/or the culture at my workplace cause me to drink alcohol or use recreational drugs more than I otherwise would.				r	'	
Strongly disagree						
Total Company	501					56%
District 0	32					46%
District 1	39					68%
District 2	32					56%
District 3	37					61%
District 4	28				4	72%
District 5	48					56%
District 6	65					60%
District 7N	40					45%
District 7S				-		49%
District 8	33					62%
District 9						58%
District 10	49					58%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
45. My workplace social events include alcohol:			I		I		
Never							
Total Company	270						30%
District 0	18						26%
District 1	17						30%
District 2	15						26%
District 3	28						46%
District 4	14		1				36%
District 5	29		1				34%
District 6	41						38%
District 7N	17						19%
District 7S	20						18%
District 8	17						32%
District 9	22						29%
District 10	32						38%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
45. My workplace social events include alcohol:			I	I	I.		
Some of the time							
Total Company	399						45%
District 0	31			1			44%
District 1	29						51%
District 2	25						44%
District 3	22						36%
District 4	18			-			46%
District 5	40						47%
District 6	44		1				40%
District 7N	44						50%
District 7S	55						50%
District 8	22						42%
District 9	33						43%
District 10	36						42%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
45. My workplace social events include alcohol:			I		I		
Often							
Total Company	141						16%
District 0	17						24%
District 1	10						18%
District 2	13						23%
District 3							11%
District 4							8%
District 5							12%
District 6							12%
District 7N							15%
District 7S			1				19%
District 8							17%
District 9							16%
District 10	13						15%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
45. My workplace social events include alcohol:			I	1	1		
Always							
Total Company	81						9%
District 0	4						6%
District 1	1	1					2%
District 2	4						7%
District 3	4						7%
District 4	4						10%
District 5	7						8%
District 6							10%
District 7N	14						16%
District 7S							13%
District 8							9%
District 9							12%
District 10	4						5%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
46. Are you exposed to distressing material, experiences, or trauma related to your clients or others you encounter in doing your job?			'		I		
Yes							
Total Company	341						38%
District 0	24						34%
District 1	12						21%
District 2	18						32%
District 3	30						49%
District 4	21						54%
District 5	40						47%
District 6	44						40%
District 7N	32						36%
District 7S	36						33%
District 8	15						28%
District 9							41%
District 10	38						45%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
46. Are you exposed to distressing material, experiences, or trauma related to your clients or others you encounter in doing your job?			T		I		
Νο							
Total Company	271						30%
District 0	21						30%
District 1	26						46%
District 2	18						32%
District 3	6						10%
District 4	7		_				18%
District 5	21						24%
District 6	33						30%
District 7N	31						35%
District 7S	40						36%
District 8							36%
District 9		_					36%
District 10	22						26%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
46. Are you exposed to distressing material, experiences, or trauma related to your clients or others you encounter in doing your job?			I		I		
Sometimes							
Total Company	269	_					30%
District 0	24						34%
District 1	19						33%
District 2	21						37%
District 3	23						38%
District 4	11						28%
District 5	24						28%
District 6	30						28%
District 7N	24						27%
District 7S	33						30%
District 8	19						36%
District 9	18						24%
District 10	23						27%

	Number Responding	0% 25% 50	D% 75% 100%	Percent Responding
46. Are you exposed to distressing material, experiences, or trauma related to your clients or others you encounter in doing your job?			ч т Т	
Unsure				
Total Company	10			1%
District 0	1			1%
District 1	0	No valid cases		0%
District 2	0	No valid cases		0%
District 3	2			3%
District 4	0	No valid cases		0%
District 5	1	1		1%
District 6	2	1		2%
District 7N	1	<u>-</u>		1%
District 7S	1	1		1%
District 8	0	No valid cases		0%
District 9	0	No valid cases		0%
District 10	2			2%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
47. How often do you find yourself thinking about work-related distressing material, experiences, or trauma <u><i>outside of work</i></u> ?					I		
Never							
Total Company	62						10%
District 0	2	-					4%
District 1	5						16%
District 2	3						8%
District 3	8						15%
District 4	1	-					3%
District 5	5						8%
District 6	11						14%
District 7N							11%
District 7S							17%
District 8							15%
District 9		1					2%
District 10	3						5%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
47. How often do you find yourself thinking about work-related distressing material, experiences, or trauma <u><i>outside of work</i></u> ?			, , , , , , , , , , , , , , , , , , ,		I		
Some of the time							
Total Company	345						56%
District 0	30						61%
District 1	16						52%
District 2	22						56%
District 3	26						47%
District 4	20						63%
District 5	34						52%
District 6	41						54%
District 7N	31						54%
District 7S	39						56%
District 8	21						62%
District 9	28						57%
District 10	37						59%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
47. How often do you find yourself thinking about work-related distressing material, experiences, or trauma <u><i>outside of work</i></u> ?			I				
Often							
Total Company	178						29%
District 0	15						31%
District 1	7						23%
District 2	10						26%
District 3	19						35%
District 4	11		1				34%
District 5	20						31%
District 6	18						24%
District 7N	17						30%
District 7S	16						23%
District 8	7						21%
District 9							37%
District 10	20						32%

	Number Responding	0% 25% 50	0% 75% 100%	Percent Responding
47. How often do you find yourself thinking about work-related distressing material, experiences, or trauma <u><i>outside of work</i></u> ?				
Always				
Total Company	35			6%
District 0	2	-		4%
District 1	3			10%
District 2	4			10%
District 3	2	-		4%
District 4	0	No valid cases		0%
District 5	6			9%
District 6	6			8%
District 7N	3			5%
District 7S	3	-		4%
District 8				3%
District 9				4%
District 10	3			5%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
48. How much of an impact does exposure to distressing material, experiences, or trauma from work have on your mental health or wellbeing?			T		I		
Significant impact							
Total Company	126		1				20%
District 0	7						14%
District 1	6						19%
District 2	10						26%
District 3	10						18%
District 4	7	·					22%
District 5	17	P					26%
District 6	13						17%
District 7N							26%
District 7S							17%
District 8			1				21%
District 9							22%
District 10	11						17%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
48. How much of an impact does exposure to distressing material, experiences, or trauma from work have on your mental health or wellbeing?					I		
Slight impact							
Total Company	331						53%
District 0	34						69%
District 1	18						58%
District 2	22						56%
District 3	24						44%
District 4	18						56%
District 5	31						48%
District 6	38						50%
District 7N	31						54%
District 7S	36						51%
District 8	17						50%
District 9	26						53%
District 10	36						57%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
48. How much of an impact does exposure to distressing material, experiences, or trauma from work have on your mental health or wellbeing?			I		I		
No impact							
Total Company	123	_					20%
District 0	7						14%
District 1	7						23%
District 2	4						10%
District 3	16		1				29%
District 4	3						9%
District 5	12		1				18%
District 6	19						25%
District 7N	9						16%
District 7S							24%
District 8							29%
District 9							20%
District 10	9						14%

	Number Responding	0% 25% 50%	%	Percent Responding
48. How much of an impact does exposure to distressing material, experiences, or trauma from work have on your mental health or wellbeing?				
Unsure				
Total Company	40			6%
District 0	1			2%
District 1	0	No valid cases		0%
District 2	3			8%
District 3	5			9%
District 4	4			13%
District 5	5			8%
District 6	6			8%
District 7N	2	-		4%
District 7S	5			7%
District 8	0	No valid cases		0%
District 9				4%
District 10	7			11%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
49. Does your employer offer wellness programs, initiatives, or other wellbeing resources?			I		I		
Yes Total Company	358						40%
District 0 District 1	41		1				59% 37%
District 2 District 3	24 17			1			42% 28%
District 4 District 5	31						38% 36%
District 6 District 7N District 7S	36						31% 41% 51%
District 8 District 9	23		1	1			43% 36%
District 10							39%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
49. Does your employer offer wellness programs, initiatives, or other wellbeing resources?			I		I		
No Total Company	445			_			50%
District 0 District 1							34% 53%
District 2 District 3	30						53% 62%
District 3 District 4 District 5	17						44% 53%
District 3 District 6 District 7N	64						59% 52%
District 7S District 8	43		(39% 53%
District 9 District 10	39						51% 47%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
49. Does your employer offer wellness programs, initiatives, or other wellbeing resources?			l		I		
I don't know Total Company	88						10%
District 0 District 1 District 2	6						7% 11% 5%
District 3 District 4 District 5	6 7		1				10% 18% 10%
District 6 District 7N District 7S	11 6						10% 7% 10%
District 8 District 9 District 10	2 10						4% 13% 14%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
50. What resources does your employer offer? Check all that apply.			, , , , , , , , , , , , , , , , , , ,		I		
Educational content on well-being Total Company	267			_			75%
District 0 District 1 District 2	17						83% 81% 58%
District 3 District 4 District 5	11 22			_			94% 73% 71%
District 6 District 7N District 7S	28 41						68% 78% 73%
District 8 District 9 District 10	21						70% 78% 73%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
50. What resources does your employer offer? Check all that apply.			I		I		
Membership or subscriptions to wellness resources or apps Total Company	168			_			47%
District 0 District 1 District 2	15		1				44% 71% 38%
District 3 District 4 District 5	3		1	4			59% 20% 42%
District 6 District 7N District 7S	17 30						44% 47% 54%
District 8 District 9 District 10	11			1			52% 41% 45%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
50. What resources does your employer offer? Check all that apply.			I	I	I		
Direct financial support for well-being activities (gym stip Total Company	78		-				22%
District 0 District 1 District 2	5						20% 24% 13%
District 3 District 4	3 2						18% 13%
District 5 District 6 District 7N	10						26% 29% 31%
District 7S District 8 District 9	6						27% 26% 19%
District 10							6%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
50. What resources does your employer offer? Check all that apply.			T	I	T		
Flexible options for mental health leave Total Company	141						39%
District 0 District 1 District 2 District 3 District 4 District 5	8 7 4 4			1			32% 38% 29% 24% 27% 42%
District 6 District 7N District 7S District 8 District 9 District 10	15 24 11 12						41% 42% 43% 48% 44% 48%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
50. What resources does your employer offer? Check all that apply.			I		I		
Access to or referrals for external wellness resources (coac Total Company	208						58%
District 0 District 1 District 2	14				-		56% 67% 58%
District 3 District 4 District 5	9						41% 60% 48%
District 6 District 7N District 7S	23 32						71% 64% 57%
District 8 District 9 District 10	14						65% 52% 55%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
50. What resources does your employer offer? Check all that apply.			T		T		
Whole office mental health opportunities (scheduled walk/str Total Company	95						27%
District 0 District 1	8 8						20% 38%
District 2 District 3	5						25% 29%
District 4 District 5	9						20% 29%
District 6 District 7N District 7S	11						21% 31% 36%
District 73 District 8 District 9	6						26% 30%
District 10							12%

	Number Responding	0% 25%	50%	75% 100%	Percent Responding
50. What resources does your employer offer? Check all that apply.					
Other, please specify:	40				400/
Total Company					12%
District 0	5				12%
District 1	1				5%
District 2	3				13%
District 3	4				24%
District 4	0	No valid cases			0%
District 5	8				26%
District 6	2				6%
District 7N	5				14%
District 7S	6				11%
District 8	2				9%
District 9	4				15%
District 10	3				9%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
52. What prevents you from utilizing these resources? Check all that apply.				I		
Stigma, or reputational/confidentiality concerns Total Company	19					11%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 8	0 3 2 1 1 1 2 5 0	No valid cases				4% 0% 27% 33% 13% 6% 7% 14% 17% 0% 20%

	Number Responding	0% 25% 50	0% 75% 100%	Percent Responding
52. What prevents you from utilizing these resources? Check all that apply.				
Fear it will affect your path to promotion Total Company	6	2		3%
District 0 District 1 District 2 District 3 District 4 District 5 District 5 District 6 District 7N District 7S District 8	0 1 0 1 1 1 2 0	No valid cases No valid cases No valid cases No valid cases No valid cases		0% 0% 0% 0% 6% 7% 7% 7% 0%
District 9 District 10		No valid cases No valid cases		0% 0%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
52. What prevents you from utilizing these resources? Check all that apply.			T		I		
Not having the time to utilize services Total Company	65						38%
District 0 District 1 District 2	1 7		1				32% 17% 64%
District 3 District 4 District 5 District 6	4 4						67% 50% 25% 27%
District 7N District 7S District 8	7 10 7						50% 33% 54%
District 9 District 10							30% 32%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
52. What prevents you from utilizing these resources? Check all that apply.					I		
Doubt that these offerings will make a difference Total Company	51						29%
District 0 District 1 District 2	1		4		l		40% 17% 64%
District 3 District 4 District 5	2 2						50% 25% 13%
District 6 District 7N District 7S District 8	5 9						27% 36% 30% 15%
District 8 District 9 District 10	2						20% 21%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
52. What prevents you from utilizing these resources? Check all that apply.			l	ľ	I		
I utilize other resources not provided by my employer Total Company	54						31%
District 0 District 1	3		1				32% 50%
District 2 District 3 District 4	2						45% 33% 25%
District 4 District 5 District 6	7		_	-			44% 20%
District 7N District 7S	9						36% 30%
District 8 District 9 District 10	2						31% 20% 21%

	Number Responding	0% 25% 5	50% 75% 100%	Percent Responding
52. What prevents you from utilizing these resources? Check all that apply.				
Too costly—financial or time away from work Total Company	6	-		3%
District 0 District 1	2 0	No valid cases		8% 0%
District 2	0	No valid cases		0%
District 3 District 4		No valid cases No valid cases		0% 0%
District 5 District 6		No valid cases No valid cases		0% 0%
District 7N District 7S	0	No valid cases		0% 7%
District 8	1			8%
District 9 District 10		No valid cases		10% 0%

	Number Responding	g 0% 25% 50% 75% 100% F	Percent Responding
52. What prevents you from utilizing these resources? Check all that apply.			
I haven't needed these resources Total Company	76		44%
District 0 District 1 District 2	3		28% 50% 18%
District 3 District 4 District 5	4 8	No valid cases	0% 50% 50%
District 6 District 7N District 7S District 8	7 12		80% 50% 40% 46%
District 9 District 10	4		40% 58%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
52. What prevents you from utilizing these resources? Check all that apply.				I		
Other, please specify: Total Company	8	-				5%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7N District 7S District 8 District 9 District 10	0 1 0 1 1 0 0 1 0	No valid cases No valid cases No valid cases No valid cases No valid cases No valid cases				8% 0% 9% 0% 6% 7% 0% 0% 8% 0% 11%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
53. Which of the following WSBA resources on well-being have you utilized? Check all that apply.					I		
CLEs on well-being related topics Total Company	338						38%
District 0 District 1	21						30% 37%
District 2 District 3 District 4	27		1				47% 44% 38%
District 5 District 6	36 38			4			42% 35%
District 7N District 7S District 8	42						45% 38% 32%
District 9 District 10			1				36% 32%

	Number Responding	0% 25%	50%	75% 100	Percent Responding
53. Which of the following WSBA resources on well-being have you utilized? Check all that apply.				I	
Online support groups (Healing Minds, Pathways to Productivi Total Company	27	P			3%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8	2 3 2 0 2 3 2 4	No valid cases			3% 4% 5% 3% 0% 2% 3% 2% 4% 6%
District 0 District 9 District 10	2				3% 2%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
53. Which of the following WSBA resources on well-being have you utilized? Check all that apply.			I		I		
Referrals for services (for therapists, prescribers, treatme Total Company	36						4%
District 0 District 1 District 2 District 3 District 3 District 4 District 5 District 5 District 6 District 7N District 7S District 8	1 3 1 0 4 5 8 4 1	No valid	l cases				1% 2% 5% 2% 5% 5% 9% 4% 2% 3%
District 9 District 10							3% 7%

	Number Responding	0% 25%	50%	75%	100%	Percent Responding
53. Which of the following WSBA resources on well-being have you utilized? Check all that apply.			ľ	I		
Peer advising Total Company	38	-				4%
District 0		No valid cases				0%
District 1 District 2	6 4					11% 7%
District 3						3%
District 4						5%
District 5		-				3%
District 6		-				4%
District 7N						7%
District 7S						1%
District 8						4%
District 9						4%
District 10	5					6%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
53. Which of the following WSBA resources on well-being have you utilized? Check all that apply.			I		'		
Mental health consultations/brief therapy Total Company	69						8%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7N District 7S District 8 District 9 District 10	8 5 4 1 10 4 9 11 4 7						11% 9% 7% 2% 3% 12% 4% 10% 10% 8% 9% 6%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
53. Which of the following WSBA resources on well-being have you utilized? Check all that apply.			, I		I		
I have not used any of these resources. Total Company	510						57%
District 0 District 1 District 2 District 3	31 29						64% 54% 51% 56%
District 4 District 5 District 6 District 7N	24 46 64						62% 53% 59% 49%
District 7S District 8 District 9 District 10	63 33 45						57% 62% 59% 63%

	Number Responding	0% 25%	509	% 75% 1009	Percent Responding
54. What prevents you from utilizing these resources? Check all that apply.					
Concerns about professional discipline Total Company	25				5%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 8	0 2 1 3 2 1 1 1	No valid cases			9% 0% 7% 3% 4% 7% 3% 2% 2% 2% 3% 11%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
54. What prevents you from utilizing these resources? Check all that apply.			,		I		
Unaware of these resources from WSBA Total Company	128						25%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S	11 8 9 6 11 10 11 17 6						36% 35% 28% 26% 25% 24% 16% 26% 27% 18%
District 9 District 10			-				18% 28%

	Number Responding	0%	25% 5	i0%	75% 100%	Percent Responding
54. What prevents you from utilizing these resources? Check all that apply.			I			
Not having the time to utilize services Total Company	100		l			20%
District 0 District 1	13 4					29% 13%
District 2 District 3	5		1			17% 21%
District 4 District 5	5					21% 28%
District 6 District 7N	11					17% 16%
District 7S District 8						14% 18%
District 9 District 10			-			18% 23%

	Number Responding	0%	25%	50%	75% 100%	Percent Responding
54. What prevents you from utilizing these resources? Check all that apply.			I		I	
Doubt that these offerings will make a difference Total Company	101		I			20%
District 0 District 1	7		l =1			20% 23%
District 2 District 3 District 4	7					28% 21% 21%
District 5 District 6	14 13					30% 20%
District 7N District 7S District 8	10					19% 16% 9%
District 9 District 10	5					11% 23%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
54. What prevents you from utilizing these resources? Check all that apply.			1		I		
I utilize other resources not provided by WSBA Total Company	105						21%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 8	5 6 11 3 10 7 12 20 6						22% 16% 21% 32% 13% 22% 11% 28% 32% 18% 13%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
54. What prevents you from utilizing these resources? Check all that apply.			I		I		
Too costly—financial or time away from work Total Company	28						5%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 9	0 4 1 0 3 2 2 8 1	No valid ca No valid ca					7% 0% 14% 3% 0% 7% 3% 5% 13% 3% 2%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
54. What prevents you from utilizing these resources? Check all that apply.			I	I	I		
I haven't needed these resources Total Company	286			_			56%
District 0 District 1 District 2 District 3 District 4	21 16 17				-		40% 68% 55% 50% 63%
District 5 District 6 District 7N District 7S District 8 District 9 District 10	44 23 30 20 27				-		52% 69% 53% 48% 61% 60% 58%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
54. What prevents you from utilizing these resources? Check all that apply.			I		I		
Other, please specify: Total Company	22	-					4%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 8	4 3 2 0 1 3 1 1 1	No valid c	ases				2% 13% 10% 6% 2% 2% 2% 2% 3% 2%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
55. What sorts of additional resources do you think would be helpful to you if available through WSBA?			I		I		
Additional CLEs or educational material Total Company	322						36%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8	26 27 21 10 36 45 28 41						29% 46% 47% 34% 26% 42% 42% 32% 38% 38%
District 9 District 10							25% 35%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
55. What sorts of additional resources do you think would be helpful to you if available through WSBA?			I		I		
Published list of well-being professionals available without Total Company	288						33%
District 0 District 1							34% 39%
District 2	17						30%
District 3 District 4	13						33% 33%
District 5 District 6							33% 26%
District 7N District 7S							33% 31%
District 8	20						38%
District 9 District 10							37% 30%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
55. What sorts of additional resources do you think would be helpful to you if available through WSBA?			I		I		
WSBA partnership with gym(s), weight management companies Total Company	440			_			50%
District 0							51%
District 1	27						48%
District 2							56%
District 3							43%
District 4	22						56%
District 5	36			-			42%
District 6	46						43%
District 7N	48						55%
District 7S	60						56%
District 8	25						47%
District 9	41						54%
District 10	41						49%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
55. What sorts of additional resources do you think would be helpful to you if available through WSBA?			I		I		
Publication of anonymous or signed stories contributed by WS Total Company	231						26%
District 0 District 1 District 2 District 3 District 4	16 19 22						24% 29% 33% 36% 18%
District 5 District 6 District 7N District 7S District 8 District 9 District 10	24 24 21 20 14 20						28% 22% 24% 19% 26% 26% 32%

	Number Responding	0%	25%	50%	75%	100%	Percent Responding
55. What sorts of additional resources do you think would be helpful to you if available through WSBA?			I		I		
Other suggestions (please list): Total Company	177		1				20%
District 0 District 1 District 2 District 3 District 4 District 5 District 6 District 7N District 7S District 8 District 8	11 10 13 12 17 28 15 22 7						16% 20% 18% 21% 31% 20% 26% 17% 20% 13% 20%

Items	Number Responding	Mean	Performance Graph	Not at All	Somewhat	Significantly
56. Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being?						
Standardizing court rules/preferences across counties						
Total Company	671	2.22		19%	40%	41%
District 0	51	2.29		24%	24%	53%
District 1	39	2.23		23%	31%	46%
District 2	44	2.23		20%	36%	43%
District 3	49	2.10		24%	41%	35%
District 4	29	1.86		34%	45%	21%
District 5	66	2.11		24%	41%	35%
District 6	90	2.13		20%	47%	33%
District 7N	67	2.34		9%	48%	43%
District 7S	77	2.14		19%	47%	34%
District 8	35	2.54		6%	34%	60%
District 9	53	2.26		13%	47%	40%
District 10	71	2.37		18%	27%	55%

Items	Number Responding	Mean	Performance Graph	Not at All	Somewhat	Significantly
56. Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being?						
Feedback resources when there are concerns about a judge's behavior (condescending						
Total Company	679	2.12		22%	45%	33%
District 0	54	1.96		31%	41%	28%
District 1	38	2.18		16%	50%	34%
District 2	43	2.16		19%	47%	35%
District 3	48	2.06		27%	40%	33%
District 4	35	2.03		26%	46%	29%
District 5	66	2.14		17%	53%	30%
District 6	89	1.99		28%	45%	27%
District 7N	71	2.30		13%	45%	42%
District 7S	75	2.07		28%	37%	35%
District 8	35	2.46		14%	26%	60%
District 9	55	2.13		20%	47%	33%
District 10	70	2.10		17%	56%	27%

Items	Number Responding	Mean	Performance Graph	Not at All	Somewhat	Significantly
56. Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being?						
Consistent consequences for abusive/demeaning tactics within						
Total Company	648	2.03		29%	38%	32%
District 0	54	2.02		33%	31%	35%
District 1	36	1.92		39%	31%	31%
District 2	42	2.10		19%	52%	29%
District 3	44	2.18		23%	36%	41%
District 4	31	1.77		45%	32%	23%
District 5	59	2.03		29%	39%	32%
District 6	88	1.91		32%	45%	23%
District 7N	68	2.22		21%	37%	43%
District 7S	71	1.92		35%	38%	27%
District 8	35	2.26		23%	29%	49%
District 9	55	1.93		35%	38%	27%
District 10	65	2.09		25%	42%	34%

Items	Number Responding	Mean	Performance Graph	Not at All	Somewhat	Significantly
56. Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being?						
Lawyer MCLE requirement for well-being education.						
Total Company	797	1.60		49%	41%	10%
District 0	64	1.56		48%	47%	5%
District 1	51	1.61		53%	33%	14%
District 2	51	1.59		47%	47%	6%
District 3	55	1.69		42%	47%	11%
District 4	36	1.44		58%	39%	3%
District 5	81	1.52		53%	42%	5%
District 6	99	1.61		52%	36%	12%
District 7N	77	1.71		43%	43%	14%
District 7S	96	1.58		52%	38%	10%
District 8	44	1.73		43%	41%	16%
District 9	66	1.59		47%	47%	6%
District 10	77	1.60		51%	39%	10%

Items	Number Responding	Mean	Performance Graph	Not at All	Somewhat	Significantly
56. Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being?						
Making court filing deadlines earlier than midnight						
Total Company	562	1.38		71%	21%	8%
District 0	45	1.53		60%	27%	13%
District 1	35	1.43		63%	31%	6%
District 2	36	1.42		69%	19%	11%
District 3	40	1.48		70%	13%	18%
District 4	23	1.22		78%	22%	0%
District 5	53	1.21		83%	13%	4%
District 6	74	1.24		81%	14%	5%
District 7N	63	1.46		65%	24%	11%
District 7S	64	1.38		69%	25%	6%
District 8	29	1.62		55%	28%	17%
District 9	41	1.29		76%	20%	5%
District 10	59	1.37		69%	24%	7%

WASHINGTON STATE BAR ASSOCIATION

Member Wellbeing Survey

Thank you for agreeing to participate in the Member Well-Being Survey. Your feedback will provide important information to inform tangible steps the WSBA can take to enhance well-being among WSBA Members and the broader legal community in Washington.

The WSBA has partnered with National Business Research Institute (NBRI) to collect and analyze information from Members. NBRI's interface will allow survey takers unique access to the survey while remaining anonymous in results reported back to the WSBA; we hope you will participate and offer your honest opinions. You may view NBRI's Privacy Policy <u>here</u>.

Instructions:

- **1.** Proceed to the questions by clicking on the Next Page button below.
- 2. Please read each question completely and indicate your response using the scale shown.
- **3.** When complete, please click on the Submit Survey button to submit your answers.

What is your gender identity?

Please Select

What is your race/ethnicity? Select all that apply:

American Indian/Native American/Alaskan Native
Asian-Central Asian
Asian-East Asian
Asian-South Asian
Asian-Southeast Asian
Asian-Unspecified
Black/African American/African Descent
Hispanic/Latinx
Middle Eastern Descent
Multi-Racial/Bi-Racial
Pacific Islander/Native Hawaiian
White/European Descent
Other (please specify)
Prefer not to disclose

What is your relationship status?

Please Select

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Do you have caregiving responsibilities on a regular basis for one or more minor children, dependent adults, or aging parents?	0	0
What is your sexual orientation?		
Please Select		
In what county is your primary practice and/or workplace?		
Please Select		
How many years have you been licensed to practice law? Please Select		
Which of the following is your WSBA license type?		
Please Select		
Rounded to the nearest whole number, how many years have you sat on the bench?		
Which setting best describes your current judicial position?		
Please Select		
Which of the following best describes your <i>primary</i> area of practice?		
Please Select		

Which of the following best describes the organization where you currently work?

Please Select

Do you have the option to work remotely?

Please Select

Please Select

In the past month, how many hours did you work in an average week? Include billable and non-billable time.

Please Select

How many *billable* hours do you work on average per week?

Please Select

	No	Yes
Does your employer have a minimum billable hour expectation?	0	0

What is the billable hour expectation?

Please Select

How often do billable hour expectations cause you stress?

Please Select

Please Select	
How often does your employer (or clients if in solo practice) expect you to be available outside of work hours? Please Select	
Have you ever considered leaving the legal profession due to stress, burnout, or mental health issues? Please Select	
How often do you feel stressed by your financial situation? Please Select	
Have financial concerns ever caused you to consider leaving the legal profession? Please Select	
Did you graduate law school with student loan debt? Please Select	
How much debt did you have upon graduation? Please Select	
To what extent has student loan debt negatively affected your mental wellbeing? Please Select	
Have you ever wanted to make a job or career change, but did not because of your student loan debt?	532

Please	Select
110030	001001

	During the past 7 days	, how many days did	you engage in physica	I activity for at least 20 minutes?
--	------------------------	---------------------	-----------------------	-------------------------------------

Please Select

How many hours of sleep do you get on an average night?

Please Select

How often do you wake up feeling rested and restored?

Please Select

Which of the following activities do you do to support your mental health and wellbeing? Check all that apply.

Meditation
Therapy, counseling, or group supports
Physical exercise or active hobby (gardening, dancing, etc.)
Prescription medication
Supplements, vitamins, or over-the-counter medications
Other:

I am not doing any activities to support my mental health.

In the past month, how often have you felt sad, depressed, or hopeless?

Please Select

In the past month, how often have you felt nervous, on edge, worried or panic?

Please Select

The following questions address sensitive topics related to mental health, specifically experiences with suicidal thoughts or acts of self-harm, and may be distressing for some individuals. If you find this content difficult, please feel free to skip this question, take a moment for self-care, and/or reach out to a support resource if needed.

24/7 National Suicide Prevention Hotline: dial 988 24/7 Crisis Text Line: Text "HOME" to 741741

	No	Yes
Do you want to skip these questions?	0	0
In the past 12 months, have you had suicidal thoughts or actions, thoughts of self-harm, or acts of self-harm? Please Select		
To what extent do you feel your work environment contributed to these the please Select	houghts or actions?	
Do you ever feel concerned about how much or how often you drink alcohol? Please Select		
In the past 12 months, has anyone expressed concern about your use o Please Select	f alcohol?	
		534

In the past 12 months, have you used drugs other than those prescribed for a current medical condition (i.e., recreational use)?

Please Select
Do you ever feel concerned about how much or how often you use drugs recreationally? Please Select
In In the past 12 months, has anyone expressed concern about your use of recreational drugs? Please Select
To what extent do you agree with the following statement: The stress of my job and/or the culture at my workplace cause me to drink alcohol or use recreational drugs more than I otherwise would. Please Select
My workplace social events include alcohol: Please Select
Are you exposed to distressing material, experiences, or trauma related to your clients or others you encounter in doing your job? Please Select
How often do you find yourself thinking about work-related distressing material, experiences, or trauma outside of work? Please Select
How much of an impact does exposure to distressing material, experiences, or trauma from work have on your mental health or wellbeing?

Please Select

Does your employer offer wellness programs, initiatives, or other wellbeing resources?

Please Select

What resources does your employer offer? Check all that apply.

Educational content on well-being

Membership or subscriptions to wellness resources or apps

Direct financial support for well-being activities (gym stipends, etc.)

Flexible options for mental health leave

Access to or referrals for external wellness resources (coaches, therapists, etc.)

Whole office mental health opportunities (scheduled walk/stretch breaks,

periodic 1/2 days not on holidays, wellness speakers at staff meetings, etc.)

Other, please specify:

	No	Yes
Have you utilized any wellness programs offered by your employer?	С	0
What prevents you from utilizing these resources? Check all that apply.		

- Stigma, or reputational/confidentiality concerns
- Fear it will affect your path to promotion
- Not having the time to utilize services
- Doubt that these offerings will make a difference
- I utilize other resources not provided by my employer
- Too costly—financial or time away from work
 - I haven't needed these resources

	Other,	please	specify:	
--	--------	--------	----------	--

Which of the following WSBA resources on well-being have you utilized? Check all that apply.

	CLEs on well-being related topics
	Online support groups (Healing Minds, Pathways to Productivity, Career
(Guidance)
	\square Referrals for services (for therapists, prescribers, treatment centers, Unbar)
	Peer advising
	Mental health consultations/brief therapy
	I have not used any of these resources.

What prevents you from utilizing these resources? Check all that apply.

Concerns about professional discipline
Unaware of these resources from WSBA
\square Not having the time to utilize services
Doubt that these offerings will make a difference
\square I utilize other resources not provided by WSBA
Too costly—financial or time away from work

I haven't needed these resources

Other, please specify:

What sorts of additional resources do you think would be helpful to you if available through WSBA?

Additional CLEs or educational material

Published list of well-being professionals available without request or log-in

WSBA partnership with gym(s), weight management companies, etc. for

discounted	mem	bers	hips

Publication of anonymous or signed stories contributed by WSBA members willing to share their struggles/successes regarding well-being challenges

Other suggestions (please list):

Please consider the following possible rule, court, or institutional changes. To what extent would they improve your well-being?	Not at All	Somewhat	Significantly
Making court filing deadlines earlier than midnight	0	0	0
Standardizing court rules/preferences across counties	0	0	0
Consistent consequences for abusive/demeaning tactics within hearings(direct comments to opposing counsel, use of improper names such as "sweetheart")	0	0	0
Feedback resources when there are concerns about a judge's behavior (condescending attitude, being overly harsh, etc.)	0	C	0
Lawyer MCLE requirement for well-being education.	0	0	0

What other possible rule, court, or institutional changes would improve your well-being?	

What could your employer, the legal community, courts, or legal institutions do to better support your mental health and wellbeing?

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WASHINGTON STATE BAR ASSOCIATION

- TO: WSBA Board of Governors
- CC: Terra Nevitt, Executive Director
- FROM: Renata Garcia, Chief Regulatory Counsel
- **DATE:** April 8, 2025
- RE: Proposed Amendments to WSBA Bylaws Art. IX Sec. B.1.a

FIRST READ: Proposed amendments to the WSBA Bylaws relating to license status for eligibility for service on a WSBA committee are presented for discussion and first read.

Background

In 2024, a member status workgroup recommended amendments to the WSBA Bylaws permitting inactive, honorary, or pro bono members to serve on WSBA committees. At the Board of Governors meeting in October 2024, the Board of Governors approved the amendments and the Court thereafter approved the amendments effective December 31, 2024. See WSBA Bylaws Art. III Sec. B.2 and 4, which relate to the benefits of different license statuses.

Overlooked in that project was Art. IX Sec. B.1.a regarding eligibility for membership on a WSBA committee. Except for the language relating to chairs and vice chairs of committees, the proposed amendments here align the committee section of the WSBA Bylaws with the intent of the member status workgroup and the sections of the Bylaws already amended. With regard to chairs and vice chairs, there does not appear to be a reason to exclude inactive, honorary, or pro bono members from serving as chair or vice chair. Each committee nomination team will be in the best position to choose the appropriate people to lead its committee.

Attachments

1. Proposed Amendments to WSBA Bylaws Art. IX Sec. B.1.a - Markup Version

Proposed Amendments to WSBA Bylaws Art. IX Sec. B.1.a.

Clean Version

IX. COMMITTEES, COUNCILS, AND OTHER BAR ENTITIES

B. COMMITTEES AND OTHER BAR ENTITIES

1. Committees

Committees are created and authorized by the BOG to study matters relating to the general purposes and business of the Bar which are of a continuous and recurring character. The number, size, and functions of each committee will be determined from time to time by the BOG.

 All active members of the Bar may serve as committee members, Chairs, and Vice Chairs. Inactive, Honorary, and Pro Bono members of the Bar may be appointed to serve as Chairs, Vice Chairs, or voting or nonvoting members on any committee as deemed appropriate. Exception: faculty of Washington state law schools who are not members of the Bar are permitted to serve on the Committee on Professional Ethics (CPE).

Proposed Amendments to WSBA Bylaws Art. IX Sec. B.1.a.

IX. COMMITTEES, COUNCILS, AND OTHER BAR ENTITIES

B. COMMITTEES AND OTHER BAR ENTITIES

1. Committees

Committees are created and authorized by the BOG to study matters relating to the general purposes and business of the Bar which are of a continuous and recurring character. The number, size, and functions of each committee will be determined from time to time by the BOG.

a. <u>All active members of the Bar may serve as</u> Committee members, Chairs, and Vice Chairs must be Active members of the Bar. <u>Inactive, Honorary, and Pro Bono members of the Bar may be appointed to serve as Chairs, Vice Chairs, or voting or nonvoting members on any committee as deemed appropriate.</u> Exceptions: (a) up to two Pro Bono members are permitted to serve on the Pro Bono and Public Service Committee (PBPSC) and may be appointed to serve as the Chair, Co Chair, or Vice Chair of that committee; and (b) faculty of Washington state law schools who are not Active members of the Bar are permitted to serve on the Committee on Professional Ethics (CPE).

WASHINGTON STATE BAR ASSOCIATION

- TO: WSBA Board of Governors (BOG)
- CC: Terra Nevitt, Executive Director
- FROM: Renata de Carvalho Garcia, Chief Regulatory Counsel
- **DATE:** April 8, 2025
- RE: Applicant APR 2(b) Request for Reconsideration of Application for Admission by Motion

EXECUTIVE SESSION – ACTION REQUESTED:

An admission applicant is requesting BOG review under Rule 2(b) of the Washington Supreme Court Admission and Practice Rules (APR) of WSBA staff's determination that applicant does not meet the criteria established in APR 3(c) and, therefore, does not qualify for lawyer admission by motion.

Application records are confidential pursuant to APR 1(b). Therefore, pursuant to WSBA Bylaws Art. VII Sec. B.7.a.2 BOG review of application matters under APR 2(b) occurs in executive session and customarily on the written record only. See WSBA Bylaws Art. VII Sec. B.7.a (other persons excluded from executive session unless approved by a majority of the BOG).

WSBA RISK ANALYSIS: N/A

WSBA FISCAL ANALYSIS: N/A

WSBA EQUITY ANALYSIS: N/A

Confidential Attachments

- 1. Regulatory Services Department Memorandum to the BOG
- 2. Applicant Letter of Request for Reconsideration of Application for Admission by Motion
- 3. Applicant application materials

WASHINGTON STATE BAR ASSOCIATION

- TO: WSBA Board of Governors
- CC: Terra Nevitt, Executive Director
- **FROM:** Jeanne Marie Clavere, Senior Professional Responsibility Counsel Monte Jewell, Chair, Committee on Professional Ethics
- DATE: March 27, 2025
- **RE:** Committee on Professional Ethics New Advisory Opinion For Information Only

Committee on Professional Ethics New Advisory Opinion 202501 – For Information Only

INFORMATION ONLY: New Advisory Opinion 202501 addresses issues surrounding lawyers representing a licensed residential care or nursing home facility in seeking a guardianship or conservator for a resident and the confidentiality of sharing information with a not yet appointed Certified Professional Guardian (CPG) or Conservator as well as the subsequent simultaneous representation of both a Long Term Care Facility and the representation of the court-appointed Certified Professional Guardian (CPG) or Conservator are 1.0A, 1.1, 1.6, 1.7, 1.10.

Background

On June 30, 2023, the Committee on Professional Ethics (CPE) received the following inquiry:

May a lawyer who represents a residential care or nursing home facility in seeking a guardianship for a resident, communicate with a proposed CPG during the guardianship proceeding as to the respondent's medical, financial, written and oral statements, and thereafter may the lawyer represent the court- appointed CPG?

The inquiry was assigned to this subcommittee at the August 2023 CPE meeting. At that time, the subcommittee members were Mark Fucile, Pam Anderson, and Janice Wang. Due to the normal rotation of individuals on and off the CPE as their terms expired, the subcommittee members are now Mark Fucile, Zachary Dillon, and Peter Jarvis.

Prior to the October 2023 meeting, the subcommittee reached out to Judge Robert A. Lewis, the chair of the Certified Professional Guardianship and Conservatorship Board, Ronald St. Hilaire, the then current chair of the WSBA Elder Law section, and Kameron Kirkevold, the chair of the KCBA Guardianship & Elder Law section. No comments were received at that time.

Community Input

After the CPE reviewed a draft advisory opinion at the February 2024 meeting, the subcommittee circulated that draft to the following stakeholders for comments: Certified Professional Guardianship &

Conservatorship Board, Columbia Legal Services, Disability Rights Washington, KCBA Guardianship & Elder Law Section, National Academy of Elder Law, WSBA Elder Law Section, and Washington State Long-Term Care Ombudsman Program.

On July 10, 2024, the subcommittee received extensive comments from attorney Amy Freeman on behalf of the State Long-Term Care Ombudsman Program for Washington. Judge Robert Lewis also responded to the outreach, but did not have any comments. Based on the Ombuds comments, and subsequent research and analysis by subcommittee members, and on input from other members of the CPE, the subcommittee thereafter submitted (and the CPE approved at their February 14, 2025, meeting) the attached substantially revised proposed Advisory Opinion.

Advisory Opinion Questions, Analysis and Conclusions

This AO addresses two questions:

- 1. May a lawyer who represents a licensed long-term care facility regarding a petition for appointment of a Certified Professional Guardian ("CPG") or conservator for a resident of the facility disclose information about the resident to the potential CPG or conservator prior to their appointment?
- 2. After a CPG or conservator is appointed, may the lawyer simultaneously represent both the facility and the CPG or conservator?

The AO concludes that the answer to the first question depends primarily on what federal and state law governing the confidentiality of information about residents of long-term care facilities permits or prohibits. If, in other words, the sharing of this information is lawful under applicable federal and state law, then the information may be shared if it is in the interests of the lawyer's client to do so. If not, then not. Since questions of federal and state confidentiality law on these issues fall outside of the scope of the RPC issues that the CPE exists to consider, the AO notes that we express no opinion on those federal and state confidentiality questions.

The AO then discusses the conflict-of-interest issues under RPC 1.7 that are at the heart of the second question. As noted in the AO, there are many instances in which the interests of a long-term care facility and a resident for whom a CPG or (to a lesser extent) a conservator may conflict within the meaning of RPC 1.7(a), and there are many such instances in which the resulting conflict may not be subject to waiver or consent within the meaning of RPC 1.7(b). On the other hand, the CPE did not believe that we could state that there will always be conflicts or that all such conflicts will not be subject to waiver or consent. For this reason, the AO necessarily stops short of a blanket prohibition on all such representations. The AO also notes that the conflicts risks that may or are likely to arise from simultaneous representation of a facility and a CPG are greater than those likely to arise from simultaneous representation of a facility and a CPG are far broader in scope than those of a conservator.

<u>Attachments</u> WSBA Ethics Advisory Opinion 202402

WASHINGTON STATE BAR ASSOCIATION

Advisory Opinion: 2025-XX

Year Issued: XX/XX/2025

RPCs: 1.0A, 1.1, 1.2, 1.6, 1.7, 1.10

Subject: Representing a Licensed Long-Term Care Facility and Sharing Information about a Resident with a Potential but not yet Appointed Certified Professional Guardian or Conservator; Subsequent Simultaneous Representation of Both a Long-Term Care Facility and a Certified Potential Guardian or Conservator

ISSUES

- 1. May a lawyer who represents a licensed long-term care facility [n.1] regarding a petition for appointment of a Certified Professional Guardian ("CPG") [n.2] or conservator [n.3] for a resident of the facility disclose information about the resident to the potential CPG or conservator prior to their appointment?
- **2.** After a CPG or conservator is appointed, may the lawyer simultaneously represent both the facility and the CPG or conservator?

SHORT ANSWERS

- 1. A lawyer representing the facility may disclose information about a resident with a prospective CPG or conservator only if the disclosure is: (a) permitted by applicable substantive law; and (b) consistent with the lawyer's duty of competent representation of the facility under RPC 1.1, including but not limited to the duty to protect confidential information about the resident.
- 2. After a CPG or conservator is appointed, the lawyer may only represent both the facility and the CPG or conservator only if: (a) no conflict of interest would result under RPC 1.7; or (b) the resulting conflict is one that is capable of written informed consent and such consent is obtained.

Representing both a long-term care facility and a CPG or conservator for a

resident of the facility will often lead to conflicts of interest, and many of those conflicts will not be subject to waiver or consent. This is especially so when the lawyer is considering representation of a CPG in addition to the facility. Even though the lawyer's second client will be the CPG and not the resident or ward, the extremely wide scope of the duties owed by CPGs to residents/wards and to the many ways in which the interests of a facility and its residents can be adverse, the simultaneous representation of both a facility and a CPG for a resident of the facility is likely to result in conflicting obligations that cannot be waived.

The conflicts risks are lower when the lawyer's second client is a conservator rather than a CPG because the duties of conservators to residents are far more limited than those owed by CPGs. Nonetheless, a case-by-case analysis of the prospects for conflicts and for conflicts waivers will still be required.

ANALYSIS

Question 1.

As with any other matter, a lawyer representing a facility regarding the potential appointment of a CPG or conservator owes the facility a duty of competent representation under RPC 1.1 [n.4] In the present context, this includes but is not limited to advising the facility against disclosures of information about a resident that would violate substantive federal or state law regarding the resident's right to confidentiality. The lawyer's duty of competent representation to the facility also includes advising the facility to take reasonable steps to assure that any potential CPG or conservator with whom information may be shared can reasonably be relied upon to protect resident confidentiality.

Since these substantive federal and state law requirements are outside the range of issues that may be addressed in Advisory Opinions, we cannot address them.[n.5] We do note, however, that any substantive federal or state obligations regarding resident confidentiality are in addition to the lawyer's duty to protect information relating to the representation of the facility under RPC 1.6.

Question 2.

A. Representing Facilities and CPGs

Washington law imposes very strong and very broad fiduciary and other legal obligations on CPGs. As noted in *Raven v. Department of Social and Health Services,* 177 Wash.2d 804, 823 (2013), "A guardianship is a trust relation of the most sacred

character." (internal citation and quotation omitted). *See also In re Disciplinary Proceedings Against Petersen*, 189 Wash.2d 768, 778 (2014) states that "the paramount duty of a guardian [is] to actively seek information and input from the ward and others close to the ward to ensure appropriate care and residential placement decisions." And as noted in *Guardianship of Lamb*, 173 Wash.2d. 173, 185 (2011) the CPG Standards under which CPGs must operate:

[D]irect guardians to provide timely and accurate reports to the court, act within the scope of the appointed guardianship, consult with the incapacitated person and defer to that person's autonomous decisionmaking capacity when possible, cooperate with professional caregivers and relatives of the incapacitated person, and seek independent professional evaluations and opinions when necessary to identify the incapacitated person's best interests.

The high and extensive set of obligations that Washington law imposes on CPGs necessarily affects the lawyer's duty of competent representation in representing a CPG. A lawyer representing a CPG must take reasonable care under RPC 1.1 to keep the CPG in compliance with the CPG's substantive obligations—including but not limited to the obligation to weigh heavily the actual or potential preferences or interests of the resident. It also follows that when representing a CPG in addition to a facility, a lawyer must consider any limitations on the lawyer's conduct that may be imposed by RPC 1.7, the general concurrent client conflict of interest rule. Moreover, cases including *ln re Guardianship of Karan*, 110 Wash.App. 76 (2002) hold that a lawyer who represents a CPG will at times owe direct duties to the resident as a third-party beneficiary even though the resident is not a client of the lawyer. A lawyer who represents a CPG may at times have direct civil liability to a resident even though the resident is not the lawyer's client--an additional potential source of conflicts under RPC 1.7. [n.6]

RPC 1.7(a) provides that:

Except as provided in paragraph (b), a lawyer shall not represent a client if the representation involves a concurrent conflict of interest. A concurrent conflict of interest exists if:

- (1) the representation of one client will be directly adverse to another client; or
- (2) there is a significant risk that the representation of one or more clients will be materially limited by the lawyer's responsibilities to another client, a former client or a third person or by a personal interest of the lawyer.

There are many instances in which the interests of residents—which, as noted, the CPG and the CPG's lawyer must strive to protect—will be inconsistent with the interests of the facility. This will be true, for example, when issues arise with respect to resident care or to policies or practices of the facility that may adversely affect the resident in some way. If a lawyer (or law firm [n.7]) represents both a CPG and a facility when one or more such

issues between them are present, a conflict of interest will be present even if the lawyer only seeks to represent one "side" of that issue. Furthermore, present disagreements or disputes between a facility and a CPG are not the only source of conflicts that the lawyer must consider. Under RPC 1.7, the lawyer is charged not only with what the lawyer actually knows about the interests of the facility and the CPG but also with whatever else the lawyer should reasonably know with respect to those interests. This includes the extent to which future conflicts are reasonably foreseeable and the likely effect of harm to clients if such conflicts arise. In other words, the lawyer will have to consider and address with each client "the likelihood that a difference in interest [between the clients] will eventuate and, if it does, whether it will materially interfere with the lawyer's independent professional judgment in considering alternatives or foreclose courses of action that reasonably should be pursued on behalf of the other client." RPC 1.7, Comment [8]. This would include consideration of added costs to a client in the event of a subsequent need to change counsel due to a conflict.

Whenever the lawyer's duties to the facility-client touch upon or concern resident rights or interests or the lawyer's duties to the CPG-client touch upon or concern resident rights or interests which could adversely affect the facility, it is difficult if not impossible to imagine that no conflict of interest under RPC 1.7(a) will exist. If, by contrast, the lawyer's representation of the facility has nothing to do with resident care issues but is limited to protecting the facility's trademarks, and if it happened that no disputes foreseeably and reasonably appeared on the horizon regarding the care of the resident by the facility, then no conflict of interest at all might be present. When, however, there is factual or legal overlap between the work that the lawyer performs or is expected to perform for the facility and the CPG, a conflict under RPC 1.7(a) will be present.

When a conflict under RPC 1.7(a) is present, the lawyer may begin or continue representation of the facility and the CPG only if permitted by RPC 1.7(b), which requires that four conditions be met:

1) the lawyer reasonably believes that the lawyer will be able to provide competent and diligent representation to each affected client,

2) the representation is not prohibited by law,

3) the representation does not involve the assertion of a claim by one client against the other in the same litigation or other proceeding before a tribunal, and

4) each affected client gives informed consent in writing (following authorization from the other client to make any required disclosures).

We are not aware of any applicable statutes, regulations or case law holding that the kinds of simultaneous representation under consideration here are unambiguously "prohibited by law" within the meaning of RPC 1.7(b)(2). Nonetheless, we note that the "reasonable belief" standard contained in RPC 1.7(b)(1) is an objective, rather than a purely subjective, standard. In other words, the lawyer must not only personally believe that the lawyer

Page 4 of 6

will be able to provide competent and diligent representation to each client, but that belief must be objectively reasonable from a neutral lawyer's or observer's point of view. In addition, and under RPC 1.7(b)(3), the lawyer could not represent both the facility and the CPG in litigation or other proceedings before a tribunal in which the facility and the CPG would be on the opposite side of any issues. And under RPC 1.7(b)(4) and RPC 1.0A(e), "Informed consent requires that each affected client be aware of the relevant circumstances and of the material and reasonably foreseeable ways that the conflict could have adverse effects on the interests of that client."

We agree that a CPG, as a lawfully appointed guardian, would have the right to waive or consent to a conflict that can be waived or consented to. Nonetheless, we find it difficult to conceive of situations in which informed consent from the CPG (and the facility) would be sufficient to allow a lawyer simultaneously to represent both a facility and a CPG for a resident of the facility with respect to any issues pertaining to the resident's rights or interests at, or with respect to, the facility.

B. <u>Representing Facilities and Conservators</u>

RPC 1.7 is also potentially applicable to the concurrent representation of a facility and a conservator. Nonetheless, the duties of a conservator are limited to protection of the resident's financial affairs and thus are much narrower in scope than the duties of a CPG with respect to the resident's overall welfare. It follows that the risk that a conflict will exist under Rule 1.7 and the risk that any resulting conflict will not be subject to waiver will be less in the facility-conservatorship context than in the facility-CPG context. If, however, a financial dispute was to arise between the facility and the conservator, it would certainly not be possible for the lawyer to represent both sides of the dispute and it is questionable whether there are many circumstances in which written consent from both clients would allow the lawyer to proceed on behalf of either one against the other.

Endnotes

- With respect to the licensing of facilities, see RCW 70.129.010(4) and sources cited therein. Residents of such facilities are protected under Washington's "long-term care resident rights" laws. See RCW 70.129.005 et seq.
- 2. Pursuant to RCW 11.130.010(11), "'Guardian' means a person appointed by the court to make decisions with respect to the personal affairs of an individual." With respect to the certification of professional guardians, *see* RCW 11.130.010 *et seq.*; GR 23.
- 3. Pursuant to RCW 11.130.010(5), "Conservator' means a person appointed by a court to make decisions with respect to the property or financial affairs of an individual subject to conservatorship." With respect to the appointment of conservators, see RCW 11.130.360 *et seq.*; GR 23.
- 4. As with any other matter, the lawyer must be satisfied that the goals and objectives that the facility wishes to pursue and how they are to be pursued are legally appropriate. See, e.g., RPC 1.2(a), (d). We therefore assume that the facility's (and the lawyer's) support for the appointment of a particular CPG or conservator is made in good faith and is not the result of an unlawful *quid pro quo* or side deal between the facility and the CPG or conservator.

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- 5. Potential sources of law on these issues include but are not necessarily limited to RCW 70.129; RCW 74.34; RCW 11.130; 45 CFR Parts 160 and 164; and 42 CFR Part 482.
- 6. Conflicts of interest could also result from a lawyer's decision to exercise the right make disclosures adverse to client interests under sections including RPC 1.6(b)(8).
- 7. Under RPC 1.10(a), the conflicts of interest addressed in this opinion would apply to all lawyers working for any of these clients at a single firm.

WASHINGTON STATE BAR ASSOCIATION

Financial Reports

(Unaudited)

Year to Date February 28, 2025

Prepared by Maggie Yu, Controller

Submitted by Tiffany Lynch, Director of Finance March 19, 2025

WASHINGTON STATE BAR ASSOCIATION

То:	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 February 28, 2025 As % of Completion to Annual Budget

	% of Year	Current Year % YTD	Current Year \$ Difference Favorable/(Unfavorable)	Prior Year YTD	Comments
Total Salaries & Benefits	42%	41%	\$39,620	42%	Favorable to budget mainly due to timing of taxes and benefits payments and higher capital labor.
Other Indirect Expenses*	42%	44%	(\$88,161)	41%	Unfavorable to budget due to timing of payments for online legal research, office downsizing expenses, audit fees, IT costs, rent and unanticipated software depreciation.
Total Indirect Expenses	42%	42%	(\$48,541)	42%	Unfavorable to budget resulting from other indirect expenses described above.

General Fund Revenues	42%	45%	\$768,508	46%	Favorable to budget due to timing of fee collection for the summer bar exam, law clerks, and MCLE. Additional revenue form interest income, and sales for new members and legal lunchbox products.
General Fund Indirect Expenses	42%	42%	(\$30,882)	41%	Unfavorable to budget as described for indirect expenses above.
General Fund Direct Expenses	42%	30%	\$369,497	24%	Favorable to budget due to timing of program activities and meetings/events.
General Fund Net	42%	-134%	\$1,107,123	118%	Favorable to budget for the reasons described above.

CLE Revenue	42%	43%	\$18,909	58%	Favorable to budget due to seasonally high product sales.
CLE Direct Expenses	42%	12%	\$105,704	17%	Favorable to budget due to timing of expenses for seminar activities and product sales.
CLE Indirect Expenses	42%	43%	(\$17,052)	43%	Unfavorable to budget due to timing of payment of other indirect expenses.
CLE Net	42%	207%	\$107,561	260%	Favorable to budget primarily due to timing of direct expenses and product sales.

*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 2025 Budget For the Period from February 1, 2025 to February 28, 2025

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
	Revenues	Revenues								
Access to Justice Admissions/Bar Exam	- 782,050	- 1,480,180	104,568 382,548	250,535 906,127	65,904 97,920	139,795 480,204	170,472 480,468	390,330 1,386,331	(170,472) 301,582	(390,330) 93,849
Admissions/Bar Exam Advancement FTE	/82,050	1,480,180	382,548	386,288	97,920	480,204 3,300	480,468	389,588	(158,723)	(389,588)
Bar News	229,928	589,600	139,351	326,761	155,767	387,175	295,117	713,936	(65,190)	(124,336)
Board of Governors	-	-	88,429	222,445	85,974	360,300	174,403	582,745	(174,403)	(582,745)
Character & Fitness Board	-	-	59,163	140,905	6,118	33,000	65,281	173,905	(65,281)	(173,905)
Communications Strategies	-	600	262,814	710,318	11,834	180,295	274,648	890,613	(274,648)	(890,013)
Communications Strategies FTE		-	108,879	249,012	-	-	108,879	249,012	(108,879)	(249,012)
Discipline	37,420	90,000	2,579,284	6,275,710	58,191	216,544	2,637,475	6,492,254	(2,600,055)	(6,402,254)
Diversity	39,916 289,109	135,000 600,000	152,935	371,905	4,852	70,900	157,787 503,747	442,805	(117,872)	(307,805)
Finance	289,109	600,000	501,288 69,306	1,154,793 165,726	2,460 4,360	4,920	503,747 73,666	1,159,713 183,526	(214,638) (73,666)	(559,713) (183,526)
Foundation Human Resources	-		344,709	574,952	4,300		344,709	574,952	(344,709)	(574,952)
Law Clerk Program	232,460	207,200	74,652	178,661	1,889	51,031	76,542	229,692	155,918	(22,492)
Legislative	232,400	-	106,569	254,298	10,793	26.275	117,362	280,573	(117,362)	(280,573)
Legal Lunchbox	30,266	34,000	22,185	34,192	4,414	4,725	26,599	38,917	3,667	(4,917)
Licensing and Membership Records	200,776	450,200	328,352	790,226	7,501	36,032	335,853	826,258	(135,076)	(376,058)
Licensing Fees	7,195,708	17,492,616	-	-	-	-	0	-	7,195,708	17,492,616
Limited License Legal Technician	12,317	25,031	40,757	103,088	403	12,500	41,160	115,588	(28,843)	(90,557)
Limited Practice Officers	78,482	189,300	42,750	106,563	7,580	37,304	50,330	143,867	28,152	45,433
Mandatory CLE	725,450	1,233,800	290,989	653,747	61,552	151,333	352,541	805,080	372,909	428,720
Member Wellness Program	1,500	10,000	95,095	227,746	2,044	11,905	97,139	239,651	(95,639)	(229,651)
Member Services & Engagement	6,350	16,300	106,725 49,922	291,819 119,503	13,816	119,550	120,541 49,922	411,369 119,503	(114,191) (49,922)	(395,069) (119,503)
Mini CLE	109,351	-			-	-				
New Member Education Office of General Counsel	270	88,000	44,884 426,877	106,868 1,002,440	1,865	1,950 26,005	44,884 428,742	108,818 1,028,445	64,467 (428,472)	(20,818) (1,028,445)
Office of the Executive Director	270		361,606	884,643	1,805	138,975	466,550	1,023,618	(466,550)	(1,023,618)
OGC-Disciplinary Board			85,073	198,045	42,094	128,500	127,167	326,545	(127,167)	(326,545)
Practice of Law Board			32.234	76,989		16,000	32,234	92,989	(32,234)	(92,989)
Practice Management Assistance	33,061	62,000	59,454	142,003	87,730	93,650	147,184	235,653	(114,123)	(173,653)
Professional Responsibility Program	-	-	87,488	208,419	1,301	6,700	88,788	215,119	(88,788)	(215,119)
Public Service Programs	39,916	132,400	92,605	223,674	103,164	310,700	195,770	534,374	(155,854)	(401,974)
Publication and Design Services	-	-	54,056	124,220	4,844	5,000	58,900	129,220	(58,900)	(129,220)
Regulatory Services FTE			183,802	439,881	1,216	9,490	185,018	449,371	(185,018)	(449,371)
Regulatory Reform	-	-	66,186	157,462	3,184	42,500	69,370	199,962	(69,370)	(199,962)
Sections Administration	353,856	275,000	119,543	296,910	35	2,400 3,053	119,578 303,387	299,310	234,278 (303,387)	(24,310)
Service Center Volunteer Engagement	-	-	302,474 87,449	726,174 242,951	8,170	5,055	95,619	729,227 311,017.01	(303,387) (95,619)	(729,227) (311,017)
Technology	-	-	87,449	2,048,168	8,170	08,000	823,180	2,048,168	(823,180)	(2,048,168)
Subtotal General Fund	10,398,186	23,111,227	8,936,783	21,374,165	962,952	3,197,877	9,899,735	24,572,042	498,451	(1,460,815)
Expenses using Facilities Reserve funds	10,070,100	20,111,227	(127,665)	21,074,105	702,752	5,177,017	(127,665)	(109,065)	127,665	109,065
Expenses using Special Project Reserve funds			(66,186)		(3,184)		(69,370)	(199,962)	69,370	199,962
Total General Fund - Net Result from Operations Percentage of Budget	10,398,186 45%		8,742,932 42%		959,768 30%		9,702,700 40%	24,263,015	695,486	(1,151,788)
CLE-Seminars and Products	731,192	1,623,710	429,745	1,051,695	44,739	306.112	474,484	1,357,807	256,708	265,904
CLE - Deskbooks	18,845	131,000	140,910	276,952	-	54,950	140,910	331,902	(122,064)	(200,902)
Total CLE	750,038	1,754,710	570,655	1,328,647	44,739	361,062	615,394	1,689,709	134,643	65,001
Percentage of Budget	43%		43%		12%		36%	(7,789)	7,386	7,789
Expenses using Facilities Reserve funds			(7,386)				(7,386)	1,681,920	142,030	72,790
Total CLE Fund - Net Result from Operations			563,269				608,008			
Total All Sections	569,364	645,483	-	-	493,077	1,040,206	493,077	1,040,206	76,287	(394,722)
Client Protection Fund-Restricted	788,113	930.540	76,842	182,964	(165,698)	506,400	(88,856)	689,364	876,969	241,176
Expenses using Facilities Reserve funds	700,115	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	(1,136)	102,904	(100,098)	5.50,400	(1,136)	(983)	1,136	983
Total CPF Fund - Net Result from Operations			75,706				(89,992)	688,381	878,105	242,159
Totals	12,505,701	26,441,960	9,584,280	22,885,776	1,335,071	5,105,545	10,919,351	27,991,320	1,586,350	(1,549,360)
Totals Net of Use of Facilities Reserve Funds			(136,187)				(136,187)	27,673,521	136,187	(1,231,561)
Totals Net of Use of Special Project Reserve Funds			(66,186) 9,381,907		(3,184) 1,331,886		(69,370) 10,713,793		69,370 1,791,908	
Percentage of Budget	47%		42%		26%		39%		.,	

Summary of Fund Balances:	Fund Balances Sept. 30, 2024	2025 Budgeted Fund Balances	Fund Balances Year to date
Restricted Funds:	Sept. 50, 2024	Fund Datances	Tear to date
Client Protection Fund	4,759,353	5,000,528	5,637,457
Board-Designated Funds (Non-General Fund):			
CLE Fund Balance	1,344,457	1,409,459	1,486,487
Section Funds	2,123,665	1,728,943	2,199,952
Board-Designated Funds (General Fund):			
Operating Reserve Fund	2,500,000	2,500,000	2,500,000
Facilities Reserve Fund	207,286	-	46,844
Special Projects and Innovation Fund	400,000	200,038	330,630
Unrestricted Funds (General Fund):			
Unrestricted General Fund	7,019,063	5,965,497	7,714,549
Total General Fund Balance	10,126,350	8,665,535	10,592,023
Net Change in Total General Fund Balance		(1,460,815)	498,451
Total Fund Balance Net Change In Fund Balance	18,353,825	16,804,465 (1,549,360)	19,915,920 1,562,095
ivet Change in Fund banance		(1,549,360)	1,562,095

Washington State Bar Association Analysis of Cash Investments As of February 28, 2025

Checking & Savings Accounts

General Fund

<u>Checking</u> <u>Bank</u> Wells Fargo	<u>Account</u> General		<u>Amount</u> 1,407,706
		Total	
Investments Wells Fargo Money Market UBS Financial Money Market CDs/Treasuries	Rate (yield) 4.30% 4.34% see list		<u>Amount</u> 16,450,227 1,167,941 9,219,260
		General Fund Total	28,245,134
<u>Client Protection Fund</u>			
Bank Wells Fargo			<u>Amount</u> 371,991
<u>Investments</u> Wells Fargo Money Market CDs/Treasuries	Rate (yield) 4.30% see list		<u>Amount</u> 2,611,091 2,712,159
		Client Protection Fund Total	5,695,240
		Grand Total Cash & Investments	33,940,374

Washington State Bar Association Analysis of Cash Investments As of February 28, 2025

General Fund

<u>General Fund</u>						
		Term	Trade	Settle	Maturity	
<u>Bank</u>	Yield	<u>Months</u>	<u>Date</u>	Date	Date	<u>Amount</u>
Cambridge Saving Bank CD	5.35%	9	6/11/2024	6/20/2024	3/17/2025	240,000
Beal Bank USA CD	5.00%	12	3/12/2024	3/20/2024	3/19/2025	250,000
Beal Bank Plano TX CD	5.00%	12	3/26/2024	4/3/2024	4/2/2025	250,000
Old National BK CD	5.00%	12	3/26/2024	4/4/2024	4/4/2025	250,000
Exchange Bank CD	5.00%	12	4/16/2024	4/24/2024	4/23/2025	250,000
Northside Community Bank CD	5.00%	12	4/16/2024	4/24/2024	4/24/2025	250,000
CF Bank CD	5.05%	12	4/26/2024	5/3/2024	5/2/2025	250,000
Morgan Stanley Bank CD	5.10%	12	5/2/2024	5/8/2024	5/8/2025	250,000
Meridian Bank CD	5.10%	12	5/9/2024	5/15/2024	5/15/2025	250,000
Morgan Stanley PVT Bank CD	5.15%	12	5/9/2024	5/15/2024	5/15/2025	250,000
City National Bank of FL CD	4.15%	9	10/10/2024	10/16/2024	7/16/2025	250,000
Bank of America Calif CD	4.10%	9	10/10/2024	10/17/2024	7/17/2025	250,000
Western Allance Bank CD	4.10%	9	10/10/2024	10/18/2024	7/18/2025	250,000
Cross River Bank CD	4.30%	9	11/19/2024	11/22/2024	8/22/2025	250,000
US Bank NA Cincinnati CD	4.40%	9	11/19/2024	11/26/2024	8/26/2025	250,000
BMO bank NA CD	4.30%	9	11/26/2024	11/29/2024	8/29/2025	250,000
HomeTrust Bank CD	4.15%	9	12/31/2024	1/9/2025	10/9/2025	250,000
Tompkins Community Bank CD	4.10%	9	1/7/2025	1/17/2025	10/17/2025	250,000
Needham Bank CD	4.10%	9	1/16/2025	1/24/2025	10/24/2025	250,000
Dogwood St Bank CD	4.20%	9	1/16/2025	1/28/2025	10/28/2025	250,000
First Bank Chicago CD	4.20%	12	11/26/2024	11/27/2024	11/26/2025	250,000
Bank of India NY CD	4.10%	11	12/17/2024	12/27/2024	12/3/2025	250,000
Federal Farm Credit Bank CD	4.25%	12	12/17/2024	12/20/2024	12/19/2025	250,243
Stearns Bank CD	4.15%	12	12/12/2024	12/23/2024	12/23/2025	250,000
Regions Bank CD	4.10%	12	12/31/2024	1/8/2025	1/8/2026	250,000
TowneBank Portsmouth CD	4.10%	12	12/31/2024	1/10/2025	1/9/2026	250,000
First Reliance Bank CD	4.25%	12	2/21/2025	2/26/2025	2/25/2026	250,000
Bank of NY Mellon CD	4.20%	12	2/21/2025	2/26/2025	2/26/2026	250,000
<u>US T- Bill's</u>						
US Treasury Bill	4.40%	4	11/19/2024	11/20/2024	3/18/2025	246,493
US Treasury Bill	4.60%	6	10/10/2024	10/11/2024	4/10/2025	244,781
US Treasury Bill	4.20%	4	12/17/2024	12/18/2024	4/15/2025	246,651
US Treasury Bill	4.15%	4	1/7/2025	1/8/2025	5/6/2025	246,689
US Treasury Bill	4.20%	6	12/12/2024	12/13/2024	6/12/2025	244,897
US Treasury Bill	4.12%	6	12/31/2024	1/2/2025	7/3/2025	244,967
US Treasury Bill	4.22%	6	2/21/2025	2/24/2025	8/31/2025	514,177
US Treasury Bill	43%	11	11/26/2024	11/27/2024	10/30/2025	240,364

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Washington State Bar Association Analysis of Cash Investments As of February 28, 2025

Client Fund Protection Fund

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		Term	Trade	Settle	Maturity	
<u>Bank</u>	Yield	Months	Date	Date	Date	<u>Amount</u>
Goldman Sachs Bank CD	5.00%	9	7/12/2024	7/23/2024	4/23/2025	250,000
FirstBank Nashville CD	5.15%	12	5/14/2024	5/17/2024	5/16/2025	250,000
Ally Bank CD	4.05%	9	10/10/2024	10/17/2024	7/17/2025	250,000
Dollar Bank CD	4.15%	12	12/12/2024	12/20/2024	12/19/2025	250,000
Bank of American NA CD	4.35%	12	1/16/2025	1/24/2025	1/23/2026	250,000
US T- Bill's						
US Treasury Bill	4.50%	6	9/13/2024	9/16/2024	3/13/2025	244,632
US Treasury Bill	4.30%	6	10/10/2024	10/11/2024	4/10/2025	244,781
US Treasury Bill	4.35%	10	8/27/2024	8/28/2024	6/12/2025	241,640
US Treasury Bill	4.20%	6	2/21/2025	2/24/2025	8/21/2025	489,963
US Treasury Bill	4.30%	10	11/26/2024	11/27/2024	10/2/2025	241,143

Total 2,712,159

Washington State Bar Association

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE DRABLE/(UNFAVORABLE)
LICENSE FEES revenue:						
LICENSE FEES	17,492,616	1,851,539	7,195,708	10,296,908	41%	(92,882)
TOTAL REVENUE:	17,492,616	1,851,539	7,195,708	10,296,908	41%	(92,882)

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE PRABLE/(UNFAVORABLE)
ADMISSIONS						
REVENUE:						
EXAM SOFTWARE REVENUE	27,500	-	-	27,500	0%	(11,458)
BAR EXAM FEES	1,378,980	214,800	755,265	623,715	55%	180,690
RULE 9/LEGAL INTERN FEES	12,500	450	2,350	10,150	19%	(2,858)
SPECIAL ADMISSIONS	61,200	4,525	24,435	36,765	40%	(1,065)
TOTAL REVENUE:	1,480,180	219,775	782,050	698,130	53%	165,308
DIRECT EXPENSES:						
POSTAGE	2,000	173	1,641	359	82%	(808)
STAFF TRAVEL/PARKING	24,000	1,980	1,998	22,002	8%	8,002
STAFF MEMBERSHIP DUES	495	-	245	250	49%	(39)
SUPPLIES	2,000	-	2,720	(720)	136%	(1,887)
FACILITY, PARKING, FOOD	100,000	44,184	44,184	55,816	44%	(2,517)
EXAMINER FEES	44,500	12,750	21,750	22,750	49%	(3,208)
UBE EXMINATIONS	118,000	-	-	118,000	0%	49,167
BOARD OF BAR EXAMINERS	42,500	-	-	42,500	0%	17,708
BAR EXAM PROCTORS	23,000	-	-	23,000	0%	9,583
DISABILITY ACCOMMODATIONS	65,000	-	1,975	63,025	3%	25,108
CHARACTER & FITNESS INVESTIGATIONS	1,000	-	700	300	70%	(283)
LAW SCHOOL VISITS	2,000	-	-	2,000	0%	833
SOFTWARE HOSTING	45,609	3,653	18,405	27,204	40%	599
STAFF CONFERENCE & TRAINING	10,100	-	4,302	5,798	43%	(94)
TOTAL DIRECT EXPENSES:	480,204	62,740	97,920	382,284	20%	102,165
INDIRECT EXPENSES:						
SALARY EXPENSE (6.65 FTE)	551,588	46,604	233,496	318,092	42%	(3,667)
BENEFITS EXPENSE	194,873	15,946	78,526	116,347	40%	2,671
OTHER INDIRECT EXPENSE	159,666	13,877	70,526	89,140	44%	(3,999)
TOTAL INDIRECT EXPENSES:	906,127	76,427	382,548	523,580	42%	(4,995)
TOTAL ALL EXPENSES:	1,386,331	139,167	480,468	905,864	35%	97,170
NET INCOME (LOSS):	93,849	80,608	301,582	(207,734)	321%	262,479

Washington State Bar Association

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE PRABLE/(UNFAVORABLE)
ADVANCEMENT FTE						
REVENUE:						
TOTAL REVENUE:						<u>-</u>
DIRECT EXPENSES:						
STAFF CONFERENCE & TRAINING	3,300	-	120	3,180	4%	1,255
TOTAL DIRECT EXPENSES:	3,300		120	3,180	4%	1,255
INDIRECT EXPENSES:						
SALARY EXPENSE (1.96 FTE)	264,525	21,518	107,936	156,589	41%	2,283
BENEFITS EXPENSE	74,703	6,060	29,869	44,834	40%	1,257
OTHER INDIRECT EXPENSE	47,060	4,092	20,798	26,261	44%	(1,190)
TOTAL INDIRECT EXPENSES:	386,288	31,671	158,603	227,685	41%	2,350
TOTAL ALL EXPENSES:	389,588	31,671	158,723	230,865	41%	3,605
NET INCOME (LOSS):	(389,588)	(31,671)	(158,723)	(230,865)	41%	3,605

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE ORABLE/(UNFAVORABLE)
ACCESS TO JUSTICE						
REVENUE:						
TOTAL REVENUE:	-		-	-		-
DIRECT EXPENSES:						
ATJ BOARD RETREAT	6,000		2,371	3,629	40%	129
LEADERSHIP TRAINING	6,000	199	1,624	4,376	27%	876
ATJ BOARD EXPENSE	58,500	5,232	26,167	32,333	45%	(1,792)
STAFF TRAVEL/PARKING	2,800	36	295	2,505	11%	872
STAFF CONFERENCE & TRAINING	2,495	-	1,530	965	61%	(491)
PUBLIC DEFENSE	4,000	-	2,279	1,721	57%	(613)
CONFERENCE/INSTITUTE EXPENSE	30,000	-	19,167	10,833	64%	(6,667)
RECEPTION/FORUM EXPENSE	30,000	7,153	12,470	17,530	42%	30
TOTAL DIRECT EXPENSES:	139,795	12,620	65,904	73,891	47%	(7,656)
INDIRECT EXPENSES:						
SALARY EXPENSE (1.68 FTE)	157,861	12,973	65,688	92,174	42%	88
BENEFITS EXPENSE	52,337	4,248	21,053	31,283	40%	754
OTHER INDIRECT EXPENSE	40,337	3,508	17,827	22,510	44%	(1,020)
TOTAL INDIRECT EXPENSES:	250,535	20,729	104,568	145,967	42%	(178)
TOTAL ALL EXPENSES:	390,330	33,349	170,472	219,858	44%	(7,835)
NET INCOME (LOSS):	(390,330)	(33,349)	(170,472)	(219,858)	44%	(7,835)

Washington State Bar Association

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVOI	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
BAR NEWS						
REVENUE:						
ROYALTIES	2,000	-	-	2,000	0%	(833)
DISPLAY ADVERTISING	405,000	51,872	192,397	212,603	48%	23,647
SUBSCRIPT/SINGLE ISSUES	100	-	72	28	72%	30
CLASSIFIED ADVERTISING	2,500	456	1,919	581	77%	877
JOB TARGET ADVERSTISING	180,000	7,877	35,540	144,460	20%	(39,460)
TOTAL REVENUE:	589,600	60,205	229,928	359,672	39%	(15,739)
DIRECT EXPENSES:						
POSTAGE	121,000	15,585	60,779	60,221	50%	(10,363)
PRINTING, COPYING & MAILING	262,500	22,522	94,212	168,288	36%	15,163
DIGITAL/ONLINE DEVELOPMENT	2,000	572	572	1,428	29%	262
GRAPHICS/ARTWORK	1,000	-	-	1,000	0%	417
EDITORIAL ADVISORY COMMITTEE	300	-	-	300	0%	125
STAFF MEMBERSHIP DUES	150	-	-	150	0%	63
SUBSCRIPTIONS	225	-	204	21	91%	(111)
TOTAL DIRECT EXPENSES:	387,175	38,678	155,767	231,408	40%	5,556
INDIRECT EXPENSES:						
SALARY EXPENSE (2.13 FTE)	207,867	15,952	90,089	117,778	43%	(3,478)
BENEFITS EXPENSE	67,753	5,282	26,744	41,010	39%	1,487
OTHER INDIRECT EXPENSE	51,141	4,431	22,518	28,623	44%	(1,209)
TOTAL INDIRECT EXPENSES:	326,761	25,665	139,351	187,411	43%	(3,200)
TOTAL ALL EXPENSES:	713,936	64,343	295,117	418,819	41%	2,356
NET INCOME (LOSS):	(124,336)	(4,138)	(65,190)	(59,146)	52%	(13,383)

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
BOARD OF GOVERNORS						
REVENUE:						
TOTAL REVENUE:		<u> </u>				<u> </u>
DIRECT EXPENSES:						
BOG MEETINGS	148,000	1,594	27,030	120,970	18%	34,636
BOG COMMITTEES' EXPENSES **	8,500	62	3,690	4,810	43%	(148)
BOG RETREAT	40,000	222	37,967	2,033	95%	(21,300)
BOG CONFERENCE ATTENDANCE BOG TRAVEL & OUTREACH	39,500	2,637	5,220	34,280	13%	11,238
LEADERSHIP TRAINING	50,000 15,000	1,253	7,976	42,024 15,000	16% 0%	12,857 6,250
BOG ELECTIONS	42,000	4,018	4,018	37,982	10%	13,482
PRESIDENT'S DINNER	42,000	4,018	4,018	10,000	0%	4,167
NEW GOVERNOR ORIENTATION **	3,500	-	0	3,500	0%	1,458
PRESIDENT'S PHOTO	3,300		-	3,300	0%	1,375
SUPPLIES	500	-	73	427	15%	135
TOTAL DIRECT EXPENSES:	360,300	9,785	85,974	274,326	24%	64,151
INDIRECT EXPENSES:						
SALARY EXPENSE (1.73 FTE) **	132,168	10,667	51,294	80,874	39%	3,776
BENEFITS EXPENSE **	48,740	4,967	18,823	29,916	39%	1,485
OTHER INDIRECT EXPENSE **	41,537	5,709	18,311	23,226	44%	(1,004)
TOTAL INDIRECT EXPENSES:	222,445	21,343	88,429	134,016	40%	4,257
TOTAL ALL EXPENSES:	582,745	31,128	174,403	408,342	30%	68,408
NET INCOME (LOSS):	(582,745)	(31,128)	(174,403)	(408,342)	30%	68,408

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
CHARACTER & FITNESS BOARD revenue:						
TOTAL REVENUE:	<u> </u>		<u> </u>	-		<u> </u>
DIRECT EXPENSES:						
CHARACTER & FITNESS BOARD EXP	18,000	-	3,022	14,978	17%	4,478
COURT REPORTERS	15,000	-	3,096	11,904	21%	3,154
TOTAL DIRECT EXPENSES:	33,000	-	6,118.21	26,882	19%	7,632
INDIRECT EXPENSES:						
SALARY EXPENSE (0.75 FTE)	95,315	7,896	39,966	55,349	42%	(251)
BENEFITS EXPENSE	27,582	2,265	11,222	16,360	41%	271
OTHER INDIRECT EXPENSE	18,007	1,569	7,975	10,032	44%	(472)
TOTAL INDIRECT EXPENSES:	140,905	11,730	59,163	81,742	42%	(453)
TOTAL ALL EXPENSES:	173,905	11,730	65,281	108,624	38%	7,179
NET INCOME (LOSS):	(173,905)	(11,730)	(65,281)	(108,624)	38%	7,179

FISCAL 2025	CURRENT	YEAR TO	REMAINING	% USED	YEAR TO DATE
BUDGET	MONTH	DATE	BALANCE	OF BUDGET	VARIANCE
				FAVO	ORABLE/(UNFAVORABLE)

CONTINUING LEGAL EDUCATION (CLE) (CLES - CLEP) REVENUE:

REVENUE:						
SEMINAR REGISTRATIONS	825,000	31,662	191,197	633,803	23%	(152,553)
SEMINAR REVENUE-OTHER	20,000	-	800	19,200	4%	(7,533)
SEMINAR SPLITS W/ CLE	(150,000)	-	-	(150,000)	0%	62,500
SHIPPING & HANDLING	210	-	81	129	39%	(7)
COURSEBOOK SALES	3,500	-	555	2,945	16%	(903)
MP3 AND VIDEO SALES	925,000	25,337	538,560	386,440	58%	153,143
TOTAL REVENUE:	1,623,710	56,999	731,192	892,518	45%	(97,587)
DIRECT EXPENSES:						
COURSEBOOK PRODUCTION	500	-	-	500	0%	208
DEPRECIATION	2,012	170	850	1,162	42%	(12)
ONLINE EXPENSES	54,000	1,839	19,858	34,142	37%	2,642
ACCREDITATION FEES	3,000	(24)	2,172	828	72%	(922)
FACILITIES	165,000	2,400	20,970	144,030	13%	47,780
DISABILITY ACCOMMODATIONS	7,000	-	-	7,000	0%	2,917
SPEAKERS & PROGRAM DEVELOP	48,000	-	766	47,234	2%	19,234
HONORARIA	3,000	-	-	3,000	0%	1,250
CLE SEMINAR COMMITTEE	200	-	-	200	0%	83
STAFF TRAVEL/PARKING	15,000	-	53	14,947	0%	6,197
STAFF CONFERENCE & TRAINING	5,900	-	-	5,900	0%	2,458
STAFF MEMBERSHIP DUES	1,500	-	-	1,500	0%	625
SUPPLIES	500	-	-	500	0%	208
COST OF SALES - COURSEBOOKS	300	-	38	262	13%	87
POSTAGE & DELIVERY-COURSEBOOKS	200	-	31	169	16%	52
TOTAL DIRECT EXPENSES:	306,112	4,385	44,739	261,373	15%	82,808
INDIRECT EXPENSES:						
SALARY EXPENSE (8.00 FTE)	630,924	50,626	254,640	376,284	40%	8,245
BENEFITS EXPENSE	228,691	18,251	90,349	138,342	40%	4,939
OTHER INDIRECT EXPENSE	192,080	16,677	84,757	107,323	44%	(4,723)
TOTAL INDIRECT EXPENSES:	1,051,695	85,554	429,745	621,949	41%	8,461
TOTAL ALL EXPENSES:	1,357,807	89,939	474,484	883,322	35%	91,268
NET INCOME (LOSS):	265,904	(32,940)	256,708	9,196	97%	145,915

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
CLIENT PROTECTION FUND						
REVENUE:						
CPF RESTITUTION	10,000	521	16,197	(6,197)	162%	12,030
CPF MEMBER ASSESSMENTS	720,540	87,340	683,445	37,095	95%	383,220
INTEREST INCOME	200,000	17,929	88,471	111,529	44%	5,138
TOTAL REVENUE:	930,540	105,791	788,113	142,427	85%	400,388
DIRECT EXPENSES:						
BANK FEES	2,500	(243)	(2,162)	4,662	-86%	3,204
GIFTS TO INJURED CLIENTS	500,000	2,800	(163,680)	663,680	-33%	372,013
CPF BOARD EXPENSES	2,000	144	144	1,856	7%	690
STAFF CONFERENCE & TRAINING	1,700	-	-	1,700	0%	708
STAFF MEMBERSHIP DUES	200	-	-	200	0%	83
TOTAL DIRECT EXPENSES:	506,400	2,701	(165,698)	672,098	-33%	376,698
INDIRECT EXPENSES:						
SALARY EXPENSE (1.23 FTE)	115,160	9,573	48,447	66,713	42%	(464)
BENEFITS EXPENSE	38,272	3,114	15,416	22,856	40%	531
OTHER INDIRECT EXPENSE	29,532	2,554	12,979	16,553	44%	(674)
TOTAL INDIRECT EXPENSES:	182,964	15,241	76,842	106,122	42%	(607)
TOTAL ALL EXPENSES:	689,364	17,942	(88,856)	778,220	-13%	376,091
NET INCOME (LOSS):	241,176	87,848	876,969	(635,794)	364%	776,479

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
COMMUNICATION STRATEGIES						
REVENUE:						
50 YEAR MEMBER TRIBUTE LUNCH	100	-	-	100	0%	(42)
WSBA LOGO MERCHANDISE SALES	500	-	-	500	0%	(208)
TOTAL REVENUE:	600			600	0%	(250)
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	5,895	198	913	4,982	15%	1,543
STAFF MEMBERSHIP DUES	1,800	-	-	1,800	0%	750
SUBSCRIPTIONS	4,000	103	539	3,461	13%	1,128
APEX DINNER	52,500	-	-	52,500	0%	21,875
BAR LEADERS SUMMIT	35,000	-	-	35,000	0%	14,583
50 YEAR MEMBER TRIBUTE LUNCH	35,000	-	-	35,000	0%	14,583
BAR OUTREACH	20,000	-	74	19,926	0%	8,259
COMMUNICATIONS OUTREACH	15,000	131	1,587	13,413	11%	4,663
STAFF CONFERENCE & TRAINING	11,100	-	8,721	2,379	79%	(4,096)
TOTAL DIRECT EXPENSES:	180,295	432	11,834	168,461	7%	63,289
INDIRECT EXPENSES:						
SALARY EXPENSE (5.39 FTE) **	426,569	35,612	148,554	278,015	35%	29,183
BENEFITS EXPENSE **	154,335	10,404	57,087	97,249	37%	7,220
OTHER INDIRECT EXPENSE **	129,414	7,014	57,174	72,240	44%	(3,251)
TOTAL INDIRECT EXPENSES:	710,318	53,029	262,814	447,504	37%	33,152
TOTAL ALL EXPENSES:	890,613	53,462	274,648	615,965	31%	96,441
NET INCOME (LOSS):	(890,013)	(53,462)	(274,648)	(615,365)	31%	96,191

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
COMMUNICATION STRATEGIES FTE						
INDIRECT EXPENSES:						
SALARY EXPENSE (1.00 FTE)	179,737	18,089	78,932	100,805	44%	(4,041)
BENEFITS EXPENSE	45,265	4,333	19,314	25,951	43%	(454)
OTHER INDIRECT EXPENSE	24,010	2,092	10,634	13,376	44%	(630)
TOTAL INDIRECT EXPENSES:	249,012	24,515	108,879	140,133	44%	(5,124)
NET INCOME (LOSS):	(249,012)	(24,515)	(108,879)	(140,133)	44%	(5,124)

Washington State Bar Association

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVOI	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
DESKBOOKS						
REVENUE:						
DESKBOOK SALES	30,000	-	-	30,000	0%	(12,500)
LEXIS/NEXIS ROYALTIES	75,000	10,634	10,634	64,366	14%	(20,616)
SECTION PUBLICATION SALES	1,000	-	-	1,000	0%	(417)
FASTCASE ROYALTIES	25,000	8,212	8,212	16,788	33%	(2,205)
TOTAL REVENUE:	131,000	18,845	18,845	112,155	14%	(35,738)
DIRECT EXPENSES:						
COST OF SALES - DESKBOOKS	5,000	-	-	5,000	0%	2,083
COST OF SALES - SECTION PUBLICATION	500	-	-	500	0%	208
SPLITS TO SECTIONS	300	-	-	300	0%	125
DESKBOOK ROYALTIES	300	-	-	300	0%	125
POSTAGE & DELIVER-DESKBOOKS	300	-	-	300	0%	125
OBSOLETE INVENTORY	48,250	-	-	48,250	0%	20,104
STAFF MEMBERSHIP DUES	250	-	-	250	0%	104
SUBSCRIPTIONS	50	-	-	50	0%	21
TOTAL DIRECT EXPENSES:	54,950			54,950	0%	22,896
INDIRECT EXPENSES:						
SALARY EXPENSE (1.75 FTE)	178,087	13,459	98,418	79,669	55%	(24,215)
BENEFITS EXPENSE	56,847	4,419	23,883	32,964	42%	(197)
OTHER INDIRECT EXPENSE	42,017	3,662	18,609	23,409	44%	(1,102)
TOTAL INDIRECT EXPENSES:	276,952	21,539	140,910	136,042	51%	(25,513)
TOTAL ALL EXPENSES:	331,902	21,539	140,910	190,992	42%	(2,617)
NET INCOME (LOSS):	(200,902)	(2,694)	(122,064)	(78,838)	61%	(38,355)

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVOI	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
DISCIPLINE						
REVENUE:						
AUDIT REVENUE	1,000	170	213	788	21%	(204)
RECOVERY OF DISCIPLINE COSTS	70,000	1,030	28,327	41,673	40%	(840)
DISCIPLINE HISTORY SUMMARY	19,000	2,040	8,880	10,120	47%	963
TOTAL REVENUE:	90,000	3,240	37,420	52,580	42%	(80)
DIRECT EXPENSES:						
		·				
DEPRECIATION-SOFTWARE	24,259	-	-	24,259	0%	10,108
PUBLICATIONS PRODUCTION	350	-	-	350	0%	146
STAFF TRAVEL/PARKING	25,000	525	4,204	20,796	17%	6,212
STAFF MEMBERSHIP DUES	7,090	-	6,308	782	89%	(3,354)
TELEPHONE	4,000	196	921	3,079	23%	745
COURT REPORTERS	60,000	9,949	25,719	34,281	43%	(719)
OUTSIDE COUNSEL/AIC	1,000	-	-	1,000	0%	417
LITIGATION EXPENSES	40,000	517	3,676	36,324	9%	12,991
DISABILITY EXPENSES	5,500	-	3,649	1,851	66%	(1,358)
TRANSLATION SERVICES	12,000	255	1,238	10,763	10%	3,763
STAFF CONFERENCE & TRAINING	37,345	8,006	12,476	24,869	33%	3,084
TOTAL DIRECT EXPENSES:	216,544	19,447	58,191	158,353	27%	32,036
INDIRECT EXPENSES:						
SALARY EXPENSE (39.00 FTE)	4,063,643	319,107	1,655,684	2,407,960	41%	37,501
BENEFITS EXPENSE	1,275,677	101,298	510,138	765,539	40%	21,394
OTHER INDIRECT EXPENSE	936,389	81,356	413,462	522,928	44%	(23,300)
TOTAL INDIRECT EXPENSES:	6,275,710	501,761	2,579,284	3,696,426	41%	35,595
TOTAL ALL EXPENSES:	6,492,254	521,209	2,637,475	3,854,779	41%	67,631
NET INCOME (LOSS):	(6,402,254)	(517,969)	(2,600,055)	(3,802,199)	41%	67,551

Washington State Bar Association

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
DIVERSITY						
REVENUE:						
DONATIONS	135,000	39,916	39,916	95,084	30%	(16,334)
TOTAL REVENUE:	135,000	39,916	39,916	95,084	30%	(16,334)
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,700	-	211	3,489	6%	1,331
STAFF MEMBERSHIP DUES	700	390	480	220	69%	(188)
DEI COUNCIL	5,900	199	279	5,621	5%	2,180
DIVERSITY EVENTS & PROJECTS	43,100	6	3,675	39,425	9%	14,283
INTERNAL DIVERSITY OUTREACH	7,500	-	-	7,500	0%	3,125
STAFF CONFERENCE & TRAINING	3,000	-	162	2,838	5%	1,088
CONSULTING SERVICES	7,000	-	45	6,955	1%	2,872
TOTAL DIRECT EXPENSE:	70,900	595	4,852	66,048	7%	24,689
INDIRECT EXPENSES:						
SALARY EXPENSE (2.69 FTE)	227,749	18,592	92,910	134,839	41%	1,986
BENEFITS EXPENSE	79,569	6,402	31,564	48,004	40%	1,589
OTHER INDIRECT EXPENSE	64,587	5,600	28,461	36,126	44%	(1,549)
TOTAL INDIRECT EXPENSES:	371,905	30,595	152,935	218,970	41%	2,025
TOTAL ALL EXPENSES:	442,805	31,190	157,787	285,017	36%	26,715
NET INCOME (LOSS):	(307,805)	8,726	(117,872)	(189,933)	38%	10,380

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
ETHICS, WELLNESS, & PRACTICE (MWP-PMA-PRP) REVENUE:						
DIVERSIONS	10,000	-	1,500	8,500	15%	(2,667)
ROYALTIES	62,000	16,582	33,061	28,939	53%	7,228
TOTAL REVENUE:	72,000	16,582	34,561	37,439	48%	4,561
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	1,450	_	965	485	67%	(361)
MEMBER WELLNESS COUNCIL	4,250	-	1,042	3,208	25%	729
LEGAL TECH TASK FORCE	5,000	-	2,750	2,250	55%	(667)
STAFF TRAVEL/PARKING	5,000	265	689	4,311	14%	1,394
STAFF CONFERENCE & TRAINING	9,100	-	222	8,878	2%	3,570
SUBSCRIPTIONS	1,455	110	552	903	38%	55
CPE COMMITTEE	1,000	-	286	714	29%	130
FASTCASE	85,000	-	84,568	432	99%	(49,152)
TOTAL DIRECT EXPENSES:	112,255	375	91,074	21,181	81%	(44,301)
INDIRECT EXPENSES:						
SALARY EXPENSE (3.51 FTE)	376,056	31,342	157,613	218,443	42%	(923)
BENEFITS EXPENSE	117,836	9,592	47,363	70,474	40%	1,736
OTHER INDIRECT EXPENSE	84,275	7,292	37,061	47,214	44%	(1,947)
TOTAL INDIRECT EXPENSES:	578,168	48,226	242,037	336,130	42%	(1,134)
TOTAL ALL EXPENSES:	690,423	48,601	333,111	357,311	48%	(45,435)
NET INCOME (LOSS):	(618,423)	(32,020)	(298,550)	(319,873)	48%	(40,874)

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE DRABLE/(UNFAVORABLE)
FINANCE						
REVENUE:						
INTEREST INCOME	600,000	70,626	289,109	310,891	48%	39,109
TOTAL REVENUE:	600,000	70,626	289,109	310,891	48%	39,109
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,750	754	2,156	1,594	57%	(594)
STAFF CONFERENCE & TRAINING	500	-	303	197	61%	(95)
STAFF MEMBERSHIP DUES	670	-	-	670	0%	279
TOTAL DIRECT EXPENSES:	4,920	754	2,460	2,460	50%	(410)
INDIRECT EXPENSES:						
SALARY EXPENSE (6.92 FTE)	755,465	68,954	331,414	424,051	44%	(16,637)
BENEFITS EXPENSE	233,179	19,820	96,533	136,646	41%	625
OTHER INDIRECT EXPENSE	166,149	14,431	73,341	92,808	44%	(4,112)
TOTAL INDIRECT EXPENSES:	1,154,793	103,204	501,288	653,505	43%	(20,124)
TOTAL ALL EXPENSES:	1,159,713	103,958	503,747	655,965	43%	(20,534)
NET INCOME (LOSS):	(559,713)	(33,332)	(214,638)	(345,075)	38%	18,576

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE PRABLE/(UNFAVORABLE)
FOUNDATION						
REVENUE:						
TOTAL REVENUE:						
DIRECT EXPENSES:						
CONSULTING SERVICES	3,200	-	3,200	-	100%	(1,867)
PRINTING & COPYING	1,000	-	-	1,000	0%	417
STAFF TRAVEL/PARKING	3,000	-	-	3,000	0%	1,250
SUPPLIES	2,000	-	-	2,000	0%	833
BOARD OF TRUSTEES	3,600	-	62	3,538	2%	1,438
EQUIPMENT/HARDWARE/SOFTWARE	2,400	220	1,098	1,302	46%	(98)
POSTAGE	400	-	-	400	0%	167
STAFF CONFERENCE & TRAINING	2,200	-	-	2,200	0%	917
TOTAL DIRECT EXPENSES:	17,800	220	4,360	13,440	24%	3,057
INDIRECT EXPENSES:						
SALARY EXPENSE (1.05 FTE)	106,460	8,787	44,482	61,977	42%	(124)
BENEFITS EXPENSE	34,056	2,759	13,721	20,335	40%	469
OTHER INDIRECT EXPENSE	25,210	2,185	11,103	14,108	44%	(598)
TOTAL INDIRECT EXPENSES:	165,726	13,731	69,306	96,420	42%	(253)
TOTAL ALL EXPENSES:	183,526	13,950	73,666	109,860	40%	2,803
NET INCOME (LOSS):	(183,526)	(13,950)	(73,666)	(109,860)	40%	2,803

Washington State Bar Association

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
HUMAN RESOURCES revenue:						
TOTAL REVENUE:	-	-	-	-		<u> </u>
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING STAFF MEMBERSHIP DUES SUBSCRIPTIONS STAFF TRAINING- GENERAL RECRUITING AND ADVERTISING PAYROLL PROCESSING SALARY SURVEYS CONSULTING SERVICES STAFF CONFERENCE & TRAINING TRANSFER TO INDIRECT EXPENSES TOTAL DIRECT EXPENSES:	$\begin{array}{c} 300 \\ 1,000 \\ 2,000 \\ 36,800 \\ 8,000 \\ 50,000 \\ 1,000 \\ 10,000 \\ 2,200 \\ (111,300) \end{array}$	- 281 120 5,244 - - (5,645)	15 528 993 727 1,985 24,799 - - 171 (29,219)	285 472 1,007 36,073 6,015 25,201 1,000 10,000 2,029 (82,081)	5% 53% 50% 2% 25% 50% 0% 0% 8% 26%	110 (111) (160) 14,606 1,348 (3,966) 417 4,167 745 (17,156)
						_
INDIRECT EXPENSES: SALARY EXPENSE (4.00 FTE) ALLOWANCE FOR OPEN POSITIONS BENEFITS EXPENSE OTHER INDIRECT EXPENSE	565,461 (200,000) 113,451 96,040	46,923 - 12,045 8,339	243,501 - 58,829 42,378	321,959 (200,000) 54,622 53,662	43% 0% 52% 44%	(7,893) (83,333) (11,558) (2,362)
TOTAL INDIRECT EXPENSES:	574,952	67,307	344,709	230,243	60%	(105,146)
TOTAL ALL EXPENSES:	574,952	67,307	344,709	230,243	60%	(105,146)
NET INCOME (LOSS):	(574,952)	(67,307)	(344,709)	(230,243)	60%	(105,146)

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVOI	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
LAW CLERK PROGRAM						
REVENUE:						
LAW CLERK FEES	204,000	35,660	230,160	(26,160)	113%	145,160
LAW CLERK APPLICATION FEES	3,200	300	2,300	900	72%	967
TOTAL REVENUE:	207,200	35,960	232,460	(25,260)	112%	146,126
DIRECT EXPENSES:						
SUBSCRIPTIONS	250	-	-	250	0%	104
DEPRECIATION	12,000	-	-	12,000	0%	5,000
CHARACTER & FITNESS INVESTIGATIONS	100	-	-	100	0%	42
LAW CLERK BOARD EXPENSE	8,000	173	1,613	6,387	20%	1,721
SOFTWARE HOSTING	681	55	277	404	41%	7
LAW CLERK OUTREACH	30,000	-	-	30,000	0%	12,500
TOTAL DIRECT EXPENSES:	51,031	227	1,889	49,142	4%	19,373
INDIRECT EXPENSES:						
SALARY EXPENSE (1.23 FTE)	111,508	9,392	46,798	64,710	42%	(336)
BENEFITS EXPENSE	37,621	3,051	14,875	22,746	40%	800
OTHER INDIRECT EXPENSE	29,532	2,554	12,979	16,553	44%	(674)
TOTAL INDIRECT EXPENSES:	178,661	14,996	74,652	104,009	42%	(210)
TOTAL ALL EXPENSES:	229,692	15,224	76,542	153,150	33%	19,163
NET INCOME (LOSS):	(22,492)	20,736	155,918	(178,410)	-693%	165,289

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
LEGISLATIVE						
REVENUE:						
TOTAL REVENUE:	-	-	-			-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	2,500	93	336	2,164	13%	705
STAFF MEMBERSHIP DUES	2,500	-	-	2,104	0%	83
JUD RECOMMEND COMMITTEE	2,250	-	-	2,250	0%	938
SUBSCRIPTIONS	2,000	-	1,986	14	99%	(1,153)
TELEPHONE	575	48	240	335	42%	(1)
CONTRACT LOBBYIST	15,000	3,000	6,000	9,000	40%	250
LEGISLATIVE REVIEW COMMITTEE	1,250	-	130	1,120	10%	391
BOG LEGISLATIVE COMMITTEE	300	-	-	300	0%	125
STAFF CONFERENCE & TRAINING	2,200	-	2,101	99	95%	(1,184)
TOTAL DIRECT EXPENSES:	26,275	3,141	10,793	15,482	41%	154
INDIRECT EXPENSES:						
SALARY EXPENSE (1.70 FTE)	160,438	13,276	67,200	93,237	42%	(351)
BENEFITS EXPENSE	53,043	4,307	21,385	31,658	40%	716
OTHER INDIRECT EXPENSE	40,817	3,539	17,983	22,834	44%	(976)
TOTAL INDIRECT EXPENSES:	254,298	21,122	106,569	147,729	42%	(611)
TOTAL ALL EXPENSES:	280,573	24,263	117,362	163,210	42%	(457)
NET INCOME (LOSS):	(280,573)	(24,263)	(117,362)	(163,210)	42%	(457)

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVC	YEAR TO DATE VARIANCE PRABLE/(UNFAVORABLE)
LICENSING & MEMBERSHIP RECORDS						
REVENUE:						
STATUS CERTIFICATE FEES INVESTIGATION FEES PRO HAC VICE ** MEMBER CONTACT INFORMATION	27,000 20,000 400,000 3,000	2,875 1,600 34,828 200	14,000 12,900 170,451 3,173	13,000 7,100 229,549 (173)	52% 65% 43% 106%	2,750 4,567 3,784 1,923
PHOTO BAR CARD SALES	200 450,200	48 	252 200,776	(52) 249,424	45%	169 13,193
DIRECT EXPENSES:						
POSTAGE SOFTWARE HOSTING	17,652 18,380	1,472	89 7,412	17,563 10,968	1% 40%	7,266 246
TOTAL DIRECT EXPENSES:	36,032	1,472	7,501	28,531	21%	7,512
INDIRECT EXPENSES:						
SALARY EXPENSE (4.83 FTE) BENEFITS EXPENSE OTHER INDIRECT EXPENSE	515,705 158,553 115,968	43,887 13,009 10,062	213,507 63,709 51,135	302,198 94,844 64,833	41% 40% 44%	1,370 2,355 (2,815)
TOTAL INDIRECT EXPENSES:	790,226	66,958	328,352	461,875	42%	909
TOTAL ALL EXPENSES:	826,258	68,430	335,853	490,406	41%	8,422
NET INCOME (LOSS):	(376,058)	(28,879)	(135,076)	(240,982)	36%	21,615

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE DRABLE/(UNFAVORABLE)
LIMITED LICENSE LEGAL TECHNICIAN PROGRAM						
REVENUE:						
SEMINAR REGISTRATIONS	7,000	-	5,600	1,400	80%	2,683
LLLT LICENSE FEES	17,731	1,507	6,511	11,220	37%	(877)
LLLT LATE LICENSE FEES	-	206	206	(206)		206
MCLE LATE FEES	300	-	-	300	0%	(125)
TOTAL REVENUE:	25,031	1,713	12,317	12,714	49%	1,887
DIRECT EXPENSES:						
LLLT BOARD	11,500	-	368	11,132	3%	4,424
LLLT EDUCATION	1,000	-	35	965	4%	382
TOTAL DIRECT EXPENSES:	12,500	-	403	12,097	3%	4,806
INDIRECT EXPENSES:						
SALARY EXPENSE (0.66 FTE)	66,030	5,616	25,797	40,232	39%	1,715
BENEFITS EXPENSE	21,211	1,690	7,923	13,289	37%	915
OTHER INDIRECT EXPENSE	15,847	1,385	7,037	8,810	44%	(434)
TOTAL INDIRECT EXPENSES:	103,088	8,690	40,757	62,331	40%	2,196
TOTAL ALL EXPENSES:	115,588	8,690	41,160	74,428	36%	7,002
NET INCOME (LOSS):	(90,557)	(6,978)	(28,843)	(61,714)	32%	8,889

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVC	YEAR TO DATE VARIANCE DRABLE/(UNFAVORABLE)
LIMITED PRACTICE OFFICERS						
REVENUE:						
INVESTIGATION FEES	300	-	300	-	100%	175
MCLE LATE FEES	4,000	-	1,650	2,350	41%	(17)
LPO EXAMINATION FEES	23,000	1,900	10,300	12,700	45%	717
LPO LICENSE FEES	160,000	13,400	63,892	96,108	40%	(2,774)
LPO LATE LICENSE FEES	2,000	2,340	2,340	(340)	117%	1,507
TOTAL REVENUE:	189,300	17,640	78,482	110,818	41%	(393)
DIRECT EXPENSES:						
FACILITY, PARKING, FOOD	9,500	1,972	1,972	7,528	21%	1,986
EXAM WRITING	19,000	-	4,200	14,800	22%	3,717
LPO BOARD	4,000	-	-	4,000	0%	1,667
LPO OUTREACH	1,000	-	-	1,000	0%	417
PRINTING & COPYING	200	34	34	166	17%	49
SUPPLIES	200	-	-	200	0%	83
SOFTWARE HOSTING	3,404	273	1,373	2,031	40%	45
TOTAL DIRECT EXPENSES:	37,304	2,279	7,580	29,724	20%	7,963
INDIRECT EXPENSES:						
SALARY EXPENSE (0.70 FTE)	67,660	5,758	27,181	40,479	40%	1,010
BENEFITS EXPENSE	22,097	1,745	8,219	13,878	37%	988
OTHER INDIRECT EXPENSE	16,807	1,446	7,350	9,457	44%	(347)
TOTAL INDIRECT EXPENSES:	106,563	8,949	42,750	63,813	40%	1,651
TOTAL ALL EXPENSES:	143,867	11,228	50,330	93,538	35%	9,615
NET INCOME (LOSS):	45,433	6,412	28,152	17,280	62%	9,222

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
MANDATORY CONTINUING LEGAL EDUCATION						
REVENUE:						
ACTIVITY APPLICATION FEE	600,000	67,200	303,800	296,200	51%	53,800
ACTIVITY APPLICATION LATE FEE	220,000	23,250	124,450	95,550	57%	32,783
MCLE LATE FEES	225,000	114,900	181,500	43,500	81%	87,750
ANNUAL ACCREDITED SPONSOR FEES	39,000	15,000	39,000	-	100%	22,750
ATTENDANCE LATE FEES	120,000	4,950	49,400	70,600	41%	(600)
COMITY CERTIFICATES	29,800	3,275	27,300	2,500	92%	14,883
TOTAL REVENUE:	1,233,800	228,575	725,450	508,350	59%	211,367
DIRECT EXPENSES:						
DEPRECIATION	142,183	12,012	60,060	82,123	42%	(817)
STAFF MEMBERSHIP DUES	500	-	500	-	100%	(292)
MCLE BOARD	4,000	-	992	3,008	25%	675
STAFF TRAVEL/PARKING	50	-	-	50	0%	21
STAFF CONFERENCE & TRAINING	4,600	-	-	4,600	0%	1,917
TOTAL DIRECT EXPENSES:	151,333	12,012	61,552	89,781	41%	1,503
INDIRECT EXPENSES:						
SALARY EXPENSE (4.78 FTE)	402,008	37,185	184,189	217,819	46%	(16,686)
BENEFITS EXPENSE	136,972	11,386	56,134	80,838	41%	938
OTHER INDIRECT EXPENSE	114,768	9,969	50,666	64,101	44%	(2,846)
TOTAL INDIRECT EXPENSES:	653,747	58,540	290,989	362,758	45%	(18,594)
TOTAL ALL EXPENSES:	805,080	70,552	352,541	452,539	44%	(17,091)
NET INCOME (LOSS):	428,720	158,023	372,909	55,811	87%	194,276

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
MEMBER SERVICES & ENGAGEMENT						
TEAM						
I EAW (LLB-MINI-MSE-NME)						
(LLB-MINI-MSE-INME) REVENUE:						
ROYALTIES	10,800	1,200	6,350	4,450	59%	1,850
NMP PRODUCT SALES	60,000	6,414 980	98,626	(38,626)	164%	73,626
DIGITAL VIDEO SALES SPONSORSHIPS	25,000 11,500	980	21,266 9,000	3,734 2,500	85% 78%	10,849 4,208
SEMINAR REGISTRATIONS	16,000	7,161	10,725	5,275	67%	4,058
TRIAL ADVOCACY PROGRAM	15,000	-	-	15,000	0%	(6,250)
TOTAL DEVENUE.			145.0(7			
TOTAL REVENUE:	138,300	24,755	145,967	(7,667)	106%	88,342
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,500	46	82	3,418	2%	1,376
STAFF CONFERENCE & TRAINING	2,200	-	-	2,200	0%	917
SMALL TOWN AND RURAL COMMITTEE	7,500	-	-	7,500	0%	3,125
PRINTING & COPYING	1,600	1,442	1,442	158	90%	(775)
NEW LAWYER OUTREACH DISABILITY ACCOMMODATIONS	1,000 2,000	-	-	1,000 2,000	0% 0%	417 833
HONORARIUM	1,500	-	-	1,500	0%	625
YLL SECTION PROGRAM	1,300	(35)	520	780	40%	22
SMALL TOWN AND RURAL COMMITTEE OUTREACH	1,500	(55)	520	780	4070	22
AND ACTIVITIES	65,000	-	-	65,000	0%	27,083
ON24 OVERAGE CHARGE	4,500	4,414	4,414	86	98%	(2,539)
MEMBER ENGAGEMENT COUNCIL	500	-	-	500	0%	208
WYLC CLE COMPS	1,000	-	-	1,000	0%	417
WYLC OUTREACH EVENTS	5,000	1,346	1,346	3,654	27%	737
SPEAKERS & PROGRAM DEVELOP	100	-	-	100	0%	42
WYL COMMITTEE	15,000	75	778	14,222	5%	5,472
TRIAL ADVOCACY EXPENSES	1,700	-	-	1,700	0%	708
LAW LIBRARY DESKBOOK ACCESS	10,000	-	9,311	689	93%	(5,144)
LAW SCHOOL OUTREACH	500	-	-	500	0%	208
RECEPTION/FORUM EXPENSE	1,000	100	200	800	20%	217
INSURANCE REBATE	(3,375)	-	-	(3,375)	0%	(1,406)
STAFF MEMBERSHIP DUES	450	-	-	450	0%	188
LENDING LIBRARY NMP SPEAKERS & PROGRAM DEVELOPMENT	4,000 250	49 -	136	3,864 250	3% 0%	1,531 104
TOTAL DIRECT EXPENSES:	126,225	7,437	18,230	107,995	14%	34,364
INDIRECT EXPENSES:						
SALARY EXPENSE (4.64 FTE)	333,094	26,677	125,869	207,225	38%	12,920
BENEFITS EXPENSE	126,899	10,119	48,744	78,154	38%	4,130
OTHER INDIRECT EXPENSE	111,406	9,662	49,103	62,304	44%	(2,683)
INSURANCE REBATE	(19,016)	-	-	(19,016)	0%	(7,923)
TOTAL INDIRECT EXPENSES:	552,383	46,459	223,716	328,667	41%	6,444
TOTAL ALL EXPENSES:						
IVIAL ALL EATENSES;	678,608	53,896	241,945	436,662	36%	40,808
NET INCOME (LOSS):	(540,308)	(29,141)	(95,979)	(444,329)	18%	129,150

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVOR	YEAR TO DATE VARIANCE ABLE/(UNFAVORABLE)
OFFICE OF THE EXECUTIVE DIRECTOR						
REVENUE:						
TOTAL REVENUE:						<u> </u>
DIRECT EXPENSES:						
LEADERSHIP TRAINING	20,000	-	-	20,000	0%	8,333
WASHINGTON LEADERSHIP INSTITUTE	100,000	-	100,000	-	100%	(58,333)
ED TRAVEL & OUTREACH	6,000	1,175	1,581	4,419	26%	919
STAFF TRAVEL/PARKING	2,000	198	913	1,087	46%	(80)
STAFF CONFERENCE & TRAINING	8,800	-	1,505	7,295	17%	2,162
STAFF MEMBERSHIP DUES	2,175	300	945	1,230	43%	(39)
TOTAL DIRECT EXPENSES:	138,975	1,673	104,944	34,031	76%	(47,038)
INDIRECT EXPENSES:						
SALARY EXPENSE (4.23 FTE) **	621,554	51,254	249,636	371,917	40%	9,344
BENEFITS EXPENSE **	161,527	14,998	67,200	94,327	42%	103
OTHER INDIRECT EXPENSE **	101,562	10,940	44,770	56,793	44%	(2,452)
TOTAL INDIRECT EXPENSES:	884,643	77,192	361,606	523,037	41%	6,995
TOTAL ALL EXPENSES:	1,023,618	78,865	466,550	557,068	46%	(40,043)
NET INCOME (LOSS):	(1,023,618)	(78,865)	(466,550)	(557,068)	46%	(40,043)

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVC	YEAR TO DATE VARIANCE PRABLE/(UNFAVORABLE)
OFFICE OF GENERAL COUNSEL						
REVENUE:						
RECORDS REQUEST FEES	-	-	270	(270)		270
TOTAL REVENUE:	-		270	(270)		270
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,500	-	-	3,500	0%	1,458
STAFF MEMBERSHIP DUES	2,090	-	1,625	465	78%	(754)
COURT RULES COMMITTEE	1,000	-	-	1,000	0%	417
CUSTODIANSHIPS	5,000	-	-	5,000	0%	2,083
WILLS	2,000	-	-	2,000	0%	833
LITIGATION EXPENSES	200	-	136	64	68%	(52)
DISABILITY ACCOMMODATIONS	6,000	-	-	6,000	0%	2,500
STAFF CONFERENCE & TRAINING	6,215	104	104	6,111	2%	2,485
TOTAL DIRECT EXPENSES:	26,005	104	1,865	24,140	7%	8,970
INDIRECT EXPENSES:						
SALARY EXPENSE (5.92 FTE) **	658,437	54,913	281,940	376,497	43%	(7,592)
BENEFITS EXPENSE	201,864	16,546	82,229	119,635	41%	1,881
OTHER INDIRECT EXPENSE	142,139	12,339	62,707	79,432	44%	(3,483)
TOTAL INDIRECT EXPENSES:	1,002,440	83,798	426,877	575,563	43%	(9,193)
TOTAL ALL EXPENSES:	1,028,445	83,903	428,742	599,703	42%	(223)
NET INCOME (LOSS):	(1,028,445)	(83,903)	(428,472)	(599,973)	42%	47

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025	CURRENT	YEAR TO	REMAINING	% USED	YEAR TO DATE	
	BUDGET	MONTH	DATE	BALANCE	OF BUDGET	VARIANCE	
					FAVO	RABLE/(UNFAVORA	BLE)
L -							

OFFICE OF GENERAL COUNSEL -DISCIPLINARY BOARD

REVENUE:						
TOTAL REVENUE:	·	-	<u> </u>	<u> </u>		
DIRECT EXPENSE:						
STAFF MEMBERSHIP DUES	100	-	-	100	0%	42
DISCIPLINARY BOARD EXPENSES	5,000	-	-	5,000	0%	2,083
CHIEF HEARING OFFICER	40,000	3,333	16,665	23,335	42%	2
COURT REPORTERS	25,000	1,061	4,411	20,589	18%	6,005
HEARING OFFICER EXPENSES	4,000	-	18	3,982	0%	1,649
HEARING OFFICER TRAINING	1,000	-	-	1,000	0%	417
APPOINTED COUNSEL	50,400	4,200	21,000	29,400	42%	-
DISCIPLINARY SELECTION PANEL	1,000	-	-	1,000	0%	417
STAFF CONFERENCE & TRAINING	2,000	-	-	2,000	0%	833
TOTAL DIRECT EXPENSES:	128,500	8,594	42,094	86,406	33%	11,447
INDIRECT EXPENSES:						
SALARY EXPENSE (1.30 FTE)	125,704	10,447	54,417	71,288	43%	(2,040)
BENEFITS EXPENSE	41,128	3,347	16,895	24,233	41%	241
OTHER INDIRECT EXPENSE	31,213	2,708	13,761	17,452	44%	(756)
TOTAL INDIRECT EXPENSES:	198,045	16,501	85,073	112,972	43%	(2,554)
TOTAL ALL EXPENSES:	326,545	25,096	127,167	199,378	39%	8,893
NET INCOME (LOSS):	(326,545)	(25,096)	(127,167)	(199,378)	39%	8,893

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
PRACTICE OF LAW BOARD						
REVENUE:						
TOTAL REVENUE:	<u> </u>			<u> </u>		<u> </u>
DIRECT EXPENSES:						
PRACTICE OF LAW BOARD	16,000	-	-	16,000	0%	6,667
TOTAL DIRECT EXPENSES:	16,000		-	16,000	0%	6,667
INDIRECT EXPENSES:						
SALARY EXPENSE (0.55 FTE)	47,386	3,923	19,861	27,525	42%	(117)
BENEFITS EXPENSE	16,398	1,322	6,587	9,810	40%	245
OTHER INDIRECT EXPENSE	13,205	1,139	5,786	7,419	44%	(284)
TOTAL INDIRECT EXPENSES:	76,989	6,384	32,234	44,755	42%	(155)
TOTAL ALL EXPENSES:	92,989	6,384	32,234	60,755	35%	6,511
NET INCOME (LOSS):	(92,989)	(6,384)	(32,234)	(60,755)	35%	6,511

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
PUBLIC SERVICE PROGRAMS						
REVENUE:						
DONATIONS & GRANTS	132,400	39,916	39,916	92,484	30%	(15,251)
TOTAL REVENUE:	132,400	39,916	39,916	92,484	30%	(15,251)
DIRECT EXPENSES:						
DONATIONS/SPONSORSHIPS/GRANTS	300,000	24,000	102,441	197,559	34%	22,559
STAFF TRAVEL/PARKING	2,000	- -	54	1,946	3%	779
PRO BONO & PUBLIC SERVICE COMMITTEE	2,500	-	-	2,500	0%	1,042
STAFF CONFERENCE & TRAINING	2,200	-	-	2,200	0%	917
PRO BONO OUTREACH	4,000	501	669	3,331	17%	997
TOTAL DIRECT EXPENSES:	310,700	24,501	103,164	207,536	33%	26,294
INDIRECT EXPENSES:						
SALARY EXPENSE (1.62 FTE)	136,915	11,125	56,310	80,605	41%	738
BENEFITS EXPENSE	47,862	3,855	19,094	28,769	40%	849
OTHER INDIRECT EXPENSE	38,896	3,385	17,201	21,695	44%	(995)
TOTAL INDIRECT EXPENSES:	223,674	18,365	92,605	131,068	41%	592
TOTAL ALL EXPENSES:	534,374	42,865	195,770	338,604	37%	26,886
NET INCOME (LOSS):	(401,974)	(2,950)	(155,854)	(246,120)	39%	11,635

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE DRABLE/(UNFAVORABLE)
PUBLICATION & DESIGN SERVICES						
REVENUE:						
TOTAL REVENUE:	<u> </u>		<u> </u>			
DIRECT EXPENSES:						
SUBSCRIPTIONS	200	8	88	112	44%	(5)
IMAGE LIBRARY	4,800	-	4,756	44	99%	(2,756)
TOTAL DIRECT EXPENSES:	5,000	8	4,844	156	97%	(2,761)
INDIRECT EXPENSES:						
SALARY EXPENSE (0.89 FTE)	76,345	6,729	33,743	42,602	44%	(1,932)
BENEFITS EXPENSE	26,506	2,213	10,931	15,576	41%	114
OTHER INDIRECT EXPENSE	21,369	1,846	9,383	11,986	44%	(479)
TOTAL INDIRECT EXPENSES:	124,220	10,788	54,056	70,164	44%	(2,298)
TOTAL ALL EXPENSES:	129,220	10,797	58,900	70,319	46%	(5,059)
NET INCOME (LOSS):	(129,220)	(10,797)	(58,900)	(70,319)	46%	(5,059)

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 **42% OF YEAR COMPLETE**

YEAR TO

REMAINING

% USED

YEAR TO DATE

CURRENT

FISCAL 2025

	BUDGET	MONTH	DATE	BALANCE	OF BUDGET FAVORA	VARIANCE ABLE/(UNFAVORABLE)
REGULATORY SERVICES FTE						
REVENUE:						
TOTAL REVENUE:	<u> </u>		<u> </u>			-
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	490	-	490	-	100%	(286)
STAFF CONFERENCE & TRAINING	8,400	-	600	7,800	7%	2,900
STAFF TRAVEL/PARKING	600		126	474	21%	124
TOTAL DIRECT EXPENSES:	9,490		1,216	8,274	13%	3,024
INDIRECT EXPENSES:						
SALARY EXPENSE (2.25 FTE)	300,943	25,107	125,473	175,471	42%	(80)
BENEFITS EXPENSE	84,916	7,001	34,403	50,512	41%	978
OTHER INDIRECT EXPENSE	54,022	4,708	23,926	30,097	44%	(1,416)
TOTAL INDIRECT EXPENSES:	439,881	36,816	183,802	256,079	42%	(518)
TOTAL ALL EXPENSES:	449,371	36,816	185,018	264,353	41%	2,506
NET INCOME (LOSS):	(449,371)	(36,816)	(185,018)	(264,353)	41%	2,220

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
REGULATORY REFORM						
REVENUE:						
TOTAL REVENUE:				<u> </u>		
DIRECT EXPENSES:						
CONSULTING SERVICES	42,500	218	3,184	39,316	7%	14,524
TOTAL DIRECT EXPENSES:	42,500	218	3,184	39,316	7%	
INDIRECT EXPENSES:						
SALARY EXPENSE (0.75 FTE)	109,615	9,137	45,967	63,648	42%	(294)
BENEFITS EXPENSE	29,839	2,473	12,244	17,596	41%	189
OTHER INDIRECT EXPENSE	18,007	1,569	7,975	10,032	44%	(472)
TOTAL INDIRECT EXPENSES:	157,462	13,180	66,186	91,276	42%	(577)
TOTAL ALL EXPENSES:	199,962	13,398	69,370	130,592	35%	(577)
NET INCOME (LOSS):	(199,962)	(13,398)	(69,370)	(130,592)	35%	13,947

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVOI	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
SERVICE CENTER REVENUE:						
TOTAL REVENUE:			<u> </u>	-		<u> </u>
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING STAFF CONFERENCE & TRAINING	2,376 677	198 -	913 -	1,463 677	38% 0%	77 282
TOTAL DIRECT EXPENSES:	3,053	198	913	2,140	30%	359
INDIRECT EXPENSES:						
SALARY EXPENSE (5.78 FTE) BENEFITS EXPENSE OTHER INDIRECT EXPENSE	427,125 160,271 138,778	36,664 13,205 12,093	177,158 63,860 61,456	249,967 96,411 77,321	41% 40% 44%	811 2,920 (3,632)
TOTAL INDIRECT EXPENSES:	726,174	61,962	302,474	423,699	42%	98_
TOTAL ALL EXPENSES:	729,227	62,160	303,387	425,839	42%	457
NET INCOME (LOSS):	(729,227)	(62,160)	(303,387)	(425,839)	42%	457

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE RABLE/(UNFAVORABLE)
SECTIONS ADMINISTRATION						
REVENUE:						
REIMBURSEMENTS FROM SECTIONS	275,000	30,018	353,856	(78,856)	129%	239,273
TOTAL REVENUE:	275,000	30,018	353,856	(78,856)	129%	239,273
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	1,500	35	35	1,465	2%	590
SECTION/COMMITTEE CHAIR MTGS	700	-	-	700	0%	292
STAFF MEMBERSHIP DUES	200	-	-	200	0%	83
TOTAL DIRECT EXPENSES:	2,400	35	35	2,365	1%	965
INDIRECT EXPENSES:						
SALARY EXPENSE (2.53 FTE)	169,092	13,833	66,219	102,873	39%	4,236
BENEFITS EXPENSE	67,073	5,432	26,271	40,802	39%	1,676
OTHER INDIRECT EXPENSE	60,745	5,323	27,053	33,692	45%	(1,743)
TOTAL INDIRECT EXPENSES:	296,910	24,588	119,543	177,366	40%	4,169
TOTAL ALL EXPENSES:	299,310	24,623	119,578	179,731	40%	5,134
NET INCOME (LOSS):	(24,310)	5,395	234,278	(258,588)	-964%	244,407

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	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAV	YEAR TO DATE VARIANCE ORABLE/(UNFAVORABLE)
SECTIONS OPERATIONS						
REVENUE:						
SECTION DUES	438,280	47,393	554,174	(115,894)	126%	371,557
SEMINAR PROFIT SHARE	159,700	-	-	159,700	0%	(66,542)
INTEREST INCOME	2,050	-	-	2,050	0%	(854)
PUBLICATIONS REVENUE	1,250	1,865	1,865	(615)	149%	1,344
OTHER	44,203	-	13,325	30,878	30%	(5,093)
TOTAL REVENUE:	645,483	49,258	569,364	76,119	88%	300,413
DIRECT EXPENSES:						
DIRECT EXPENSES OF SECTION ACTIVITIES	759,773	30,763	139,221	620,552	18%	177,351
REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES	280,433	30,018	353,856	(73,424)	126%	(237,009)
REMISERSEMENT TO WEBATOR INDIRECT EATENDED	200,455	50,010	555,650	(75,727)	12070	(237,009)
TOTAL DIRECT EXPENSES:	1,040,206	60,782	493,077	547,129	47%	(59,658)
NET INCOME (LOSS):	(394,722)	(11,523)	76,287	(471,009)	-19%	240,754

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE PRABLE/(UNFAVORABLE)
TECHNOLOGY						
REVENUE:						
TOTAL REVENUE:	<u> </u>	<u> </u>	-			-
DIRECT EXPENSES:						
CONSULTING SERVICES	115,000	11,074	67,005	47,995	58%	(19,088)
STAFF TRAVEL/PARKING	1,000	-	90	910	9%	327
STAFF MEMBERSHIP DUES	300	-	-	300	0%	125
TELEPHONE	90,000	6,940	36,321	53,679	40%	1,179
COMPUTER HARDWARE	66,200	2,884	30,213	35,987	46%	(2,630)
COMPUTER SOFTWARE	530,000	12,084	246,109	283,891	46%	(25,275)
HARDWARE SERVICE & WARRANTIES	50,000	-	21,699	28,301	43%	(865)
SOFTWARE MAINTENANCE & LICENSING	380,000	44,725	159,414	220,586	42%	(1,081)
THIRD PARTY SERVICES	65,000	306	47,595	17,405	73%	(20,512)
CLOUD INFRASTRUCTURE	130,000	-	13,494	116,506	10%	40,673
STAFF CONFERENCE & TRAINING	6,000	-	-	6,000	0%	2,500
TRANSFER TO INDIRECT EXPENSES	(1,433,500)	(78,012)	(621,940)	(811,560)	43%	24,649
TOTAL DIRECT EXPENSES:	-		-			(0)
INDIRECT EXPENSES:						
SALARY EXPENSE (12.00 FTE) **	1,414,575	113,082	587,467	827,108	42%	1,939
BENEFITS EXPENSE **	420,473	31,618	157,964	262,508	38%	17,233
CAPITAL LABOR & OVERHEAD	(75,000)	(15,257)	(49,699)	(25,301)	66%	(18,449)
OTHER INDIRECT EXPENSE	288,120	25,077	127,448	160,672	44%	(7,398)
TOTAL INDIRECT EXPENSES:	2,048,168	154,521	823,180	1,224,987	40%	(6,675)
TOTAL ALL EXPENSES:	2,048,168	154,521	823,180	1,224,987	40%	(6,675)
NET INCOME (LOSS):	(2,048,168)	(154,521)	(823,180)	(1,224,987)	40%	30,223

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Statement of Activities For the Period from February 1, 2025 to February 28, 2025 42% OF YEAR COMPLETE

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE DRABLE/(UNFAVORABLE)
VOLUNTEER ENGAGEMENT						
REVENUE:						
TOTAL REVENUE:			<u> </u>	<u> </u>		<u> </u>
DIRECT EXPENSES:						
POSTAGE	600	-	468	132	78%	(218)
STAFF MEMBERSHIP DUES	450	90	300	150	67%	(113)
STAFF CONFERENCE & TRAINING	5,200	-	-	5,200	0%	2,167
SUBSCRIPTIONS	816	-	358	458	44%	(18)
REGULATORY SCHOOL	45,000	-	5,102	39,898	11%	13,648
ABA DELEGATES	16,000	1,941	1,941	14,059	12%	4,725
TOTAL DIRECT EXPENSES:	68,066	2,031	8,170	59,896	12%	20,191
INDIRECT EXPENSES:						
SALARY EXPENSE (1.70 FTE)	150,680	12,054	50,616	100,063	34%	12,167
BENEFITS EXPENSE	51,454	4,137	18,694	32,761	36%	2,746
OTHER INDIRECT EXPENSE	40,817	3,569	18,140	22,677	44%	(1,133)
TOTAL INDIRECT EXPENSES:	242,951	19,760	87,449	155,502	36%	13,780
TOTAL ALL EXPENSES:	311,017	21,792	95,619	215,398	31%	13,780
NET INCOME (LOSS):	(311,017)	(21,792)	(95,619)	(215,398)	31%	33,971

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET FAVO	YEAR TO DATE VARIANCE DRABLE/(UNFAVORABLE)
INDIRECT EXPENSES:						
SALARIES	14,691,362	1,177,011	5,939,408	8,751,954	40%	181,993
TEMPORARY SALARIES	238,085	49,722	243,003	(4,918)	102%	(143,801)
CAPITAL LABOR & OVERHEAD	(75,000)	(15,257)	(49,699)	(25,301)	66%	18,449
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(83,333)
INSURANCE REBATE	(19,016)		-	(19,016)	0%	(7,923)
EMPLOYEE ASSISTANCE PLAN	4,800	1,200	2,400	2,400	50%	(400)
EMPLOYEE SERVICE AWARDS	2,610	260	1,130	1,480	43%	(43)
FICA (EMPLOYER PORTION)	1,110,604	90,953	441,347	669,257	40%	21,405
L&I INSURANCE	72,277	-	14,945	57,333	21%	15,171
WA STATE FAMILY MEDICAL LEAVE (EMPLOYI	33,182	3,179	13,578	19,604	41%	248
MEDICAL (EMPLOYER PORTION)	2,057,482	172,377	840,002	1,217,480	41%	17,282
RETIREMENT (EMPLOYER PORTION)	1,322,122	106,231	526,655	795,467	40%	24,229
TRANSPORTATION ALLOWANCE	34,000	330	23,235	10,765	68%	(9,068)
UNEMPLOYMENT INSURANCE	71,794	8,132	24,501	47,293	34%	5,413
TOTAL SALARY & BENEFITS EXPENSE:	19,344,303	1,594,138	8,020,506	11,323,797	41%	39,620
	19,011,000	1,00 1,000	0,020,000	11,020,737	11,0	0,,020
WORKPLACE BENEFITS	56,400	962	6,547	49,853	12%	16,953
HUMAN RESOURCES POOLED EXP	111,300	5,645	29,219	82,081	26%	17,156
MEETING SUPPORT EXPENSES	9,950	1,193	3,867	6,083	39%	279
RENT	900,000	156,533	459,362	440,638	51%	(84,362)
MOVE / DOWNSIZE EXPENSES	-	1,415	23,019	(23,019)		(23,019)
PERSONAL PROP TAXES-WSBA	8,400	1,237	2,860	5,540	34%	640
FURNITURE, MAINT, LH IMP	75,617	(2,180)	34,819	40,798	46%	(3,312)
OFFICE SUPPLIES & EQUIPMENT	22,164	2,058	8,385	13,779	38%	850
FURN & OFFICE EQUIP DEPRECIATION	112,375	9,616	47,440	64,935	42%	(617)
COMPUTER HARDWARE DEPRECIATION **	42,000	3,388	15,881	26,119	38%	1,619
COMPUTER SOFTWARE DEPRECIATION	18,067	3,717	21,372	(3,305)	118%	(13,844)
INSURANCE	288,200	21,710	108,550	179,650	38%	11,533
WORK HOME FURNITURE & EQUIP	14,000	-	1,030	12,970	7%	4,803
PROFESSIONAL FEES-AUDIT	41,000	-	36,577	4,423	89%	(19,493)
PROFESSIONAL FEES-LEGAL	200,000	6,432	44,913	155,087	22%	38,420
ONLINE LEGAL RESEARCH	77,900	6,305	39,421	38,479	51%	(6,963)
ACCOMODATIONS FUND	6,500	_	_	6,500	0%	2,708
TRANSLATION SERVICES	12,000	288	2,548	9,452	21%	2,452
TELEPHONE & INTERNET	33,600	2,740	13,560	20,040	40%	440
POSTAGE - GENERAL	15,500	289	2,457	13,043	16%	4,001
RECORDS STORAGE	10,000	5,175	18,850	(8,850)	189%	(14,684)
BANK FEES	40,000	3,199	16,865	23,135	42%	(198)
PRODUCTION MAINTENANCE & SUPPLIES	13,000	(34)	4,290	8,710	33%	1,126
COMPUTER POOLED EXPENSES	1,433,500	78,012	621,940	811,560	43%	(24,649)
TOTAL OTHER INDIRECT EXPENSES:	3,541,473	307,699	1,563,775	1,977,698	44%	(88,161)
TOTAL INDIRECT EXPENSES:	22,885,776	1,901,837	9,584,280	13,301,495	42%	(48,540)

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

	FISCAL 2025 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE
SUMMARY PAGE				
ACCESS TO JUSTICE	(390,330)	(33,349)	(170,472)	(219,858)
ADMISSIONS/BAR EXAM	93,849	80,608	301,582	(207,734)
ADVANCEMENT FTE	(389,588)	(31,671)	(158,723)	(230,865)
BAR NEWS	(124,336)	(4,138)	(65,190)	(59,146)
BOARD OF GOVERNORS	(582,745)	(31,128)	(174,403)	(408,342)
CLE - PRODUCTS	699,820	9,686	446,939	252,881
CLE - SEMINARS	(433,917)	(42,625)	(190,231)	(243,686)
CLIENT PROTECTION FUND	241,176	87,848	876,969	(635,794)
CHARACTER & FITNESS BOARD	(173,905)	(11,730)	(65,281)	(108,624)
COMMUNICATIONS	(890,013)	(53,462)	(274,648)	(615,365)
COMMUNICATIONS FTE	(249,012)	(24,515)	(108,879)	(140,133)
DESKBOOKS	(200,902)	(2,694)	(122,064)	(78,838)
DISCIPLINE	(6,402,254)	(517,969)	(2,600,055)	(3,802,199)
DIVERSITY	(307,805)	8,726	(117,872)	(189,933)
FINANCE	(559,713)	(33,332)	(214,638)	(345,075)
FOUNDATION	(183,526)	(13,950)	(73,666)	(109,860)
HUMAN RESOURCES	(574,952)	(67,307)	(344,709)	(230,243)
LAW CLERK PROGRAM	(22,492)	20,736	155,918	(178,410)
LEGISLATIVE	(280,573)	(24,263)	(117,362)	(163,210)
LEGAL LUNCHBOX	(4,917)	1,192	3,667	(8,584)
LICENSE FEES	17,492,616	1,851,539	7,195,708	10,296,908
LICENSING AND MEMBERSHIP	(376,058)	(28,879)	(135,076)	(240,982)
LIMITED LICENSE LEGAL TECHNICIAN	(90,557)	(6,978)	(28,843)	(61,714)
LIMITED PRACTICE OFFICERS	45,433	6,412	28,152	17,280
MANDATORY CLE ADMINISTRATION	428,720	158,023	372,909	55,811
MEMBER WELLNESS PROGRAM	(229,651)	(19,206)	(95,639)	(134,012)
MINI CLE	(119,503)	(9,906)	(49,922)	(69,582)
MEMBER SERVICES & ENGAGEMENT	(395,069)	(25,205)	(114,191)	(280,878)
NEW MEMBER EDUCATION	(20,818)	4,778	64,467	(85,286)
OFFICE OF GENERAL COUNSEL	(1,028,445)	(83,903)	(428,472)	(599,973)
OFFICE OF THE EXECUTIVE DIRECTOR	(1,023,618)	(78,865)	(466,550)	(557,068)
OGC-DISCIPLINARY BOARD	(326,545)	(25,096)	(127,167)	(199,378)
PRACTICE OF LAW BOARD	(92,989)	(6,384)	(32,234)	(60,755)
PRACTICE MANAGEMENT ASSISTANCE	(173,653)	4,530	(114,123)	(59,529)
PROFESSIONAL RESPONSIBILITY PROGRAM	(215,119)	(17,344)	(88,788)	(126,331)
PUBLIC SERVICE PROGRAMS	(401,974)	(2,950)	(155,854)	(246,120)
PUBLICATION & DESIGN SERVICES	(129,220)	(10,797)	(58,900)	(70,319)
REGULATORY SERVICES FTE	(449,371)	(36,816)	(185,018)	(264,353)
REGULATORY REFORM	(199,962)	(13,398)	(69,370)	(130,592)
SECTIONS ADMINISTRATION	(24,310)	5,395	234,278	(258,588)
SECTIONS OPERATIONS	(394,722)	(11,523)	76,287	(471,009)
SERVICE CENTER	(729,227)	(62,160)	(303,387)	(425,839)
TECHNOLOGY	(2,048,168)	(154,521)	(823,180)	(1,224,987)
VOLUNTEER EDUCATION	(311,017)	(21,792)	(95,619)	(215,398)
INDIRECT EXPENSES	22,885,776	1,901,837	9,584,280	13,301,495
TOTAL OF ALL	(21,336,416)	(2,633,456)	(11,170,630)	(10,165,785)
NET INCOME (LOSS)	(1,549,360)	731,620	1,586,350	(3,135,710)

WASHINGTON STATE BAR ASSOCIATION

WSBA MISSION

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

WSBA GUIDING PRINCIPLES

The WSBA will operate a well-managed association that supports its members and advances and promotes:

Access to the justice system.
 Focus: Brouida training and lowerage community partnership

Focus: Provide training and leverage community partnerships in order to enhance a culture of service for legal professionals to give back to their communities, with a particular focus on services to underserved low and moderate income people.

- Diversity, equality, and cultural understanding throughout the legal community. Focus: Work to understand the lay of the land of our legal community and provide tools to members and employers in order to enhance the retention of minority legal professionals in our community.
- The public's understanding of the rule of law and its confidence in the legal system. Focus: Educate youth and adult audiences about the importance of the three branches of government and how they work together.
- A fair and impartial judiciary.
- The ethics, civility, professionalism, and competence of the Bar.

MISSION FOCUS AREAS	PROGRAM CRITERIA
 Ensuring Competent and Qualified Legal Professionals Cradle to Grave Regulation and Assistance 	 Does the Program further either or both of WSBA's mission-focus areas? Does WSBA have the competency to operate the Program? As the mandatory bar, how is WSBA uniquely positioned to successfully operate the Program?
 Promoting the Role of Legal Professionals in Society Service Professionalism 	 Is statewide leadership required in order to achieve the mission of the Program? Does the Program's design optimize the expenditure of WSBA resources devoted to the Program, including the balance between volunteer and staff involvement, the number of people served, the cost per person, etc?

2016 - 2018 STRATEGIC GOALS

- Equip members with skills for the changing profession
- Promote equitable conditions for members from historically marginalized or underrepresented backgrounds to enter, stay and thrive in the profession
- Explore and pursue regulatory innovation and advocate to enhance the public's access to legal services

GR 12 REGULATION OF THE PRACTICE OF LAW

The Washington Supreme Court has inherent and plenary authority to regulate the practice of law in Washington. The legal profession serves clients, courts, and the public, and has special responsibilities for the quality of justice administered in our legal system. The Court ensures the integrity of the legal profession and protects the public by adopting rules for the regulation of the practice of law and actively supervising persons and entities acting under the Supreme Court's authority.

[Adopted effective September 1, 2017.]

GR 12.1 REGULATORY OBJECTIVES

Legal services providers must be regulated in the public interest. In regulating the practice of law in Washington, the Washington Supreme Court's objectives include: protection of the public; advancement of the administration of justice and the rule of law; meaningful access to justice and information about the law, legal issues, and the civil and criminal justice systems;

(a) transparency regarding the nature and scope of legal services To be provided, the credentials of those who provide them, and the availability of regulatory protections;

- (b) delivery of affordable and accessible legal services;
- (c) efficient, competent, and ethical delivery of legal services;
- (d) protection of privileged and confidential information;
- (e) independence of professional judgment;

(f) Accessible civil remedies for negligence and breach of other duties owed, disciplinary sanctions for misconduct, and advancement of appropriate preventive or wellness programs;

(g) Diversity and inclusion among legal services providers and freedom from discrimination for those receiving legal services and in the justice system.

[Adopted effective September 1, 2017.]

GR 12.2 WASHINGTON STATE BAR ASSOCIATION: PURPOSES, AUTHORIZED ACTIVITIES, AND PROHIBITED ACTIVITIES

In the exercise of its inherent and plenary authority to regulate the practice of law in Washington, the Supreme Court authorizes and supervises the Washington State Bar Association's activities. The Washington State Bar Association carries out the administrative responsibilities and functions expressly delegated to it by this rule and other Supreme Court rules and orders enacted or adopted to regulate the practice of law, including the purposes and authorized activities set forth below.

(a) Purposes: In General. In general, the Washington State Bar Association strives to:

- (1) Promote independence of the judiciary and the legal profession.
- (2) Promote an effective legal system, accessible to all.
- (3) Provide services to its members and the public.
- (4) Foster and maintain high standards of competence, professionalism, and ethics among its members.
- (5) Foster collegiality among its members and goodwill between the legal profession and the public.
- (6) Promote diversity and equality in the courts and the legal profession.

(7) Administer admission, regulation, and discipline of its members in a manner that protects the public and respects the rights of the applicant or member.

(8) Administer programs of legal education.

(9) Promote understanding of and respect for our legal system and the law.

(10) Operate a well-managed and financially sound association, with a positive work environment for its employees.

(11) Serve as a statewide voice to the public and to the branches of government on matters relating to these purposes and the activities of the association and the legal profession.

(b) Specific Activities Authorized. In pursuit of these purposes, the Washington State Bar Association may:

(1) Sponsor and maintain committees and sections, whose activities further these purposes;

(2) Support the judiciary in maintaining the integrity and fiscal stability of an independent and effective judicial system;

(3) Provide periodic reviews and recommendations concerning court rules and procedures;

(4) Administer examinations and review applicants' character and fitness to practice law;

(5) Inform and advise its members regarding their ethical obligations;

(6) Administer an effective system of discipline of its members, including receiving and investigating complaints of misconduct by legal professionals, taking and recommending appropriate punitive and remedial measures, and diverting less serious misconduct to alternatives outside the formal discipline system;

(7) Maintain a program, pursuant to court rule, requiring members to submit fee disputes to arbitration;

(8) Maintain a program for mediation of disputes between members and others;

(9) Maintain a program for legal professional practice assistance;

(10) Sponsor, conduct, and assist in producing programs and products of continuing legal education; 599

(11) Maintain a system for accrediting programs of continuing legal education;

(12) Conduct examinations of legal professionals' trust accounts;

(13) Maintain a fund for client protection in accordance with the Admission and Practice Rules;

(14) Maintain a program for the aid and rehabilitation of impaired members;

(15) Disseminate information about the organization's activities, interests, and positions;

(16) Monitor, report on, and advise public officials about matters of interest to the organization and the legal profession;

(17) Maintain a legislative presence to inform members of new and proposed laws and to inform public officials about the organization's positions and concerns;

(18) Encourage public service by members and support programs providing legal services to those in need;

(19) Maintain and foster programs of public information and education about the law and the legal system;

(20) Provide, sponsor, and participate in services to its members;

(21) Hire and retain employees to facilitate and support its mission, purposes, and activities, including in the organization's discretion, authorizing collective bargaining;

(22) Establish the amount of all license, application, investigation, and other related fees, as well as charges for services provided by the Washington State Bar Association, and collect, allocate, invest, and disburse funds so that its mission, purposes, and activities may be effectively and efficiently discharged. The amount of any license fee is subject to review by the Supreme Court for reasonableness and may be modified by order of the Court if the Court determines that it is not reasonable;

(23) Administer Supreme-Court-created boards in accordance with General Rule 12.3.

(c) Activities Not Authorized. The Washington State Bar Association will not:

(1)) Take positions on issues concerning the politics or social positions of foreign nations;

(2)) Take positions on political or social issues which do not relate to or affect the practice of law or the administration of justice; or

(3) Support or oppose, in an election, candidates for public office.

[Adopted effective July 17, 1987; amended effective December 10, 1993; September 1, 1997; September 1, 2007; September 1, 2013; September 1, 2017.]

GR 12.3

WASHINGTON STATE BAR ASSOCIATION ADMINISTRATION OF SUPREME COURT-CREATED BOARDS AND COMMITTEES

The Supreme Court has delegated to the Washington State Bar Association the authority and responsibility to administer certain boards and committees established by court rule or order. This delegation of authority includes providing and managing staff, overseeing the boards and committees to monitor their compliance with the rules and orders that authorize and regulate them, paying expenses reasonably and necessarily incurred pursuant to a budget approved by the Board of Governors, performing other functions and taking other actions as provided in court rule or order or delegated by the Supreme Court, or taking other actions as are necessary and proper to enable the board or committee to carry out its duties or functions.

[Adopted effective September 1, 2007; amended effective September 1, 2017.]

GR 12.4 WASHINGTON STATE BAR ASSOCIATION ACCESS TO RECORDS

(a) Policy and Purpose. It is the policy of the Washington State Bar Association to facilitate access to Bar records. A presumption of public access exists for Bar records, but public access to Bar records is not absolute and shall be consistent with reasonable expectations of personal privacy, restrictions in statutes, restrictions in court rules, or as provided in court orders or protective orders issued under court rules. Access shall not unduly burden the business of the Bar.

(b) Scope. This rule governs the right of public access to Bar records. This rule applies to the Washington State Bar Association and its subgroups operated by the Bar including the Board of Governors, committees, task forces, commissions, boards, offices, councils, divisions, sections, and departments. This rule also applies to boards and committees under GR 12.3 administered by the Bar. A person or entity entrusted by the

Bar with the storage and maintenance of Bar records is not subject to this rule and may not respond to a request for access to Bar records, absent express written authority from the Bar or separate authority in rule or statute to grant access to the documents.

(c) Definitions.

(1)) "Access" means the ability to view or obtain a copy of a Bar record.

(2)) "Bar record" means any writing containing information relating to the conduct of any Bar function prepared, owned, used, or retained by the Bar regardless of physical form or characteristics. Bar records include only those records in the possession of the Bar and its staff or stored under Bar ownership and control in facilities or servers. Records solely in the possession of hearing officers, non-Bar staff members of boards, committees, task forces, commissions, sections, councils, or divisions that were prepared by the hearing officers or the members and in their sole possession, including private notes and working papers, are not Bar records and are not subject to public access under this rule. Nothing in this rule requires the Bar to create a record that is not currently in possession of the Bar at the time of the request.

(3) "Writing" means handwriting, typewriting, printing, photostating, photographing, and every other means of recording any form of communication or representation in paper, digital, or other format.

(d) Bar Records--Right of Access.

(1) The Bar shall make available for inspection and copying all Bar records, unless the record falls within the specific exemptions of this rule, or any other state statute (including the Public Records Act, chapter 42.56 RCW) or federal statute or rule as they would be applied to a public agency, or is made confidential by the Rules of Professional Conduct, the Rules for Enforcement of Lawyer Conduct, the Admission to Practice Rules and associated regulations, the Rules for Enforcement of Limited Practice Officer Conduct, General Rule 25, court orders or protective orders issued under those rules, or any other state or federal statute or rule. To the extent required to prevent an unreasonable invasion of personal privacy interests or threat to safety or by the above-referenced rules, statutes, or orders, the Bar shall delete identifying details in a manner consistent with those rules, statutes, or orders when it makes available or publishes any Bar record; however, in each case, the justification for the deletion shall be explained in writing.

(2) In addition to exemptions referenced above, the following categories of Bar records are exempt from public access except as may expressly be made public by court rule:

(A) Records of the personnel committee, and personal information in Bar records for employees, appointees, members, or volunteers of the Bar to the extent that disclosure would violate their right to privacy, including home contact information (unless such information is their address of record), Social Security numbers, driver's license numbers, identification or security photographs held in Bar records, and personal data including ethnicity, race, disability status, gender, and sexual orientation. Membership class and status, bar number, dates of admission or licensing, addresses of record, and business telephone

numbers, facsimile numbers, and electronic mail addresses (unless there has been a request that electronic mail addresses not be made public) shall not be exempt, provided that any such information shall be exempt if the Executive Director approves the confidentiality of that information for reasons of personal security or other compelling reason, which approval must be reviewed annually.

(B) Specific information and records regarding

(i) internal policies, guidelines, procedures, or techniques, the disclosure of which would reasonably be expected to compromise the conduct of disciplinary or regulatory functions, investigations, or examinations;

(ii) application, investigation, and hearing or proceeding records relating to lawyer, Limited Practice Officer, or Limited License Legal Technician admissions, licensing, or discipline, or that relate to the work of ELC 2.5 hearing officers, the Board of Bar Examiners, the Character and Fitness Board, the Law Clerk

Board, the Limited Practice Board, the MCLE Board, the Limited License Legal Technician Board, the Practice of Law Board, or the Disciplinary Board in conducting investigations, hearings or proceedings; and

(iii) the work of the Judicial Recommendation Committee and the Hearing Officer selection panel, unless such records are expressly categorized as public information by court rule.

(C) Valuable formulae, designs, drawings, computer source code or object code, and research data created or obtained by the Bar.

(D) Information regarding the infrastructure, integrity, and security of computer and telecommunication networks, databases, and systems.

(E) Applications for licensure by the Bar and annual licensing forms and related records, including applications for license fee hardship waivers and any decision or determinations on the hardship waiver applications.

(F) Requests by members for ethics opinions to the extent that they contain information identifying the member or a party to the inquiry.

Information covered by exemptions will be redacted from the specific records sought. Statistical information not descriptive of any readily identifiable person or persons may be disclosed.

(3) Persons Who Are Subjects of Records.

(A) Unless otherwise required or prohibited by law, the Bar has the option to give notice of any records request to any member or third party whose records would be included in the Bar's response.

(B) Any person who is named in a record, or to whom a record specifically pertains, may present information opposing the disclosure to the applicable decision maker.

(C) If the Bar decides to allow access to a requested record, a person who is named in that record, or to whom the records specifically pertains, has a right to initiate review or to participate as a party to any review initiated by a requester. The deadlines that apply to a requester apply as well to a person who is a subject of a record.

(e) Bar Records--Procedures for Access.

(1) General Procedures. The Bar Executive Director shall appoint a Bar staff member to serve as the public records officer to whom all records requests shall be submitted. Records requests must be in writing and delivered to the Bar public records officer, who shall respond to such requests within 30 days of receipt. The Washington State Bar Association must implement this rule and adopt and publish on its website the public records officer's work mailing address, telephone number, fax number, and e-mail address, and the procedures and fee schedules for accepting and responding to records requests by the effective date of this rule. The Bar shall acknowledge receipt of the request within 14 days of receipt, and shall communicate with the requester as necessary to clarify any ambiguities as to the records being requested. Records requests shall not be directed to other Bar staff or to volunteers serving on boards, committees, task forces, commissions, sections, councils, or divisions.

(2) Charging of Fees.

(A) A fee may not be charged to view Bar records.

(B) A fee may be charged for the photocopying or scanning of Bar records according to the fee schedule established by the Bar and published on its web site.

(C) A fee not to exceed \$30 per hour may be charged for research services required to fulfill a request taking longer than one hour. The fee shall be assessed from the second hour onward.

(f) Extraordinary Requests Limited by Resource Constraints. If a particular request is of a magnitude or burden on resources that the Bar cannot fully comply within 30 days due to constraints on time, resources, and personnel, the Bar shall communicate this information to the requester along with a good faith estimate of the time needed to complete the Bar's response. The Bar must attempt to reach

agreement with the requester as to narrowing the request to a more manageable scope and as to a timeframe for the Bar's response, which may include a schedule of installment responses. If the Bar and requester are unable to reach agreement, the Bar shall respond to the extent practicable, clarify how and why the response differs from the request, and inform the requester that it has completed its response.

(g) Denials. Denials must be in writing and shall identify the applicable exemptions or other bases for denial as well as a written summary of the procedures under which the requesting party may seek further review.

(h) Review of Records Decisions.

(1) Internal Review. A person who objects to a record decision or other action by the Bar's public records officer may request review by the Bar's Executive Director.

(A) A record requester's petition for internal review must be submitted within 90 days of the Bar's public records officer's decision, on such form as the Bar shall designate and make available.

(B) The review proceeding is informal, summary, and on the record.

(C) The review proceeding shall be held within five working days. If that is not reasonably possible, then within five working days the review shall be scheduled for the earliest practical date.

(2) External Review. A person who objects to a records review decision by the Bar's Executive Director may request review by the Records Request Appeals Officer (RRAO) for the Bar.

(A) The requesting party's request for review of the Executive Director's decision must be deposited in the mail and postmarked or delivered to the Bar not later than 30 days after the issuance of the decision, and must be on such form as the Bar shall designate and make available.

(B)) The review will be informal and summary, but in the sole discretion of the RRAO may include the submission of briefs no more than 20 pages long and of oral arguments no more than 15 minutes long.

(C) Decisions of the RRAO are final unless, within 30 days of the issuance of the decision, a request for discretionary review of the decision is filed with the Supreme Court. If review is granted, review is conducted by the Chief Justice of the Washington Supreme Court or his or her designee in accordance with procedures established by the Supreme Court. A designee of the Chief Justice shall be a current or former elected judge. The review proceeding shall be on the record, without additional briefing or argument unless such is ordered by the Chief Justice or his or her designee.

(D) The RRAO shall be appointed by the Board of Governors. The Bar may reimburse the RRAO for all necessary and reasonable expenses incurred in the completion of these duties, and may provide compensation for the time necessary for these reviews at a level established by the Board of Governors.

(i) Monetary Awards Not Allowed. Attorney fees, costs, civil penalties, or fines may not be awarded under this rule.

(j) Effective Date of Rule.

(1) This rule goes into effect on July 1, 2014, and applies to records that are created on or after that date.

(2) Public access to records that are created before that date are to be analyzed according to other court rules, applicable statutes, and the common law balancing test; the Public Records Act, chapter 42.56 RCW, does not apply to such Bar records, but it may be used for nonbinding guidance.

[Adopted effective July 1, 2014; amended effective September 1, 2017.]

GR 12.5 IMMUNITY

All boards, committees, or other entities, and their members and personnel, and all personnel and employees of the Washington State Bar Association, acting on behalf of the Supreme Court under the Admission and Practice Rules, the Rules for Enforcement of Lawyer Conduct, or the disciplinary rules for limited practice officers and limited license legal technicians, shall enjoy quasi-judicial immunity if the Supreme Court would have immunity in performing the same functions.

[Adopted effective January 2, 2008; amended effective September 1, 2017.]

WASHINGTON STATE BAR ASSOCIATION

2024-2025 WSBA BOARD OF GOVERNORS MEETING SCHEDULE

MEETING DATE	LOCATION	DESCRIPTION	EXECUTIVE COMMITTEE MEETING	MATERIALS DEADLINE
October 18-19, 2024	Semiahmoo Resort Blaine, WA	Team Building Retreat		n/a
November 7-8, 2024	WSBA Conference Center Seattle, WA	BOG Meeting	October 16, 2024	October 8, 2024
January 17-18, 2025	WSBA Conference Center Seattle, WA	BOG Meeting KCBA MLK Luncheon Jan. 17	December 18, 2024	December 10, 2024
March 21-22, 2025	Great Wolf Lodge Conference Center Grand Mound, WA	BOG Meeting	February 26, 2025	February 18, 2025
May 2-3, 2025	Red Lion Hotel Port Angeles Harbor Port Angeles, WA	BOG Meeting	April 16, 2025	April 8, 2025
July 17 - 18, 2025 July 19, 2025	The Marcus Whitman Hotel and Conference Center Walla Walla, WA	BOG Meeting BOG Planning Retreat	June 25, 2025	June 17, 2025
September 26-27, 2025	WSBA Offices Seattle, WA	BOG Meeting	September 3, 2025	August 26, 2025

All proposed agenda items and materials must be submitted by the deadline stated above. Materials can be submitted through 1) a staff liaison, 2) staff supervisor or department director, 3) staff member identified by the Office of the Executive Director or, if none of those are applicable, 4) directly to the Executive Director (terran@wsba.org). Submitters will be notified of the status of their request after the materials deadline. All meeting materials will be published appx. two weeks prior to the meeting.

Materials should include: 1) a cover memo, 2) additional/supplemental materials, 3) be inclusive of all WSBA analyses, if relevant and, 4) be in final form suitable for publication. Click <u>here</u> for more information.

BASIC CHARACTERISTICS OF MOTIONS From: The Complete Idiot's Guide to Robert's Rules

The Guerilla Guide to Robert's Rules

MOTION	PURPOSE	INTERRUPT SPEAKER?	SECOND NEEDED?	DEBATABLE?	AMENDABLE?	VOTE NEEDED
1. Fix the time to which to adjourn	Sets the time for a continued meeting	No	Yes	No ¹	Yes	Majority
2. Adjourn	Closes the meeting	Νο	Yes	No	No	Majority
3. Recess	Establishes a brief break	No	Yes	No²	Yes	Majority
4. Raise a Question of Privilege	Asks urgent question regarding to rights	Yes	No	No	No	Rules by Chair
5. Call for orders of the day	Requires that the meeting follow the agenda	Yes	Νο	Νο	No	One member
5. Lay on the table	Puts the motion aside for later consideration	No	Yes	No	No	Majority
7. Previous question	Ends debate and moves directly to the vote	No	Yes	No	No	Two-thirds
3. Limit or extend limits of debate	Changes the debate limits	Νο	Yes	No	Yes	Two-thirds
). Postpone to a certain time	Puts off the motion to a specific time	Νο	Yes	Yes	Yes	Majority ³
10. Commit or refer	Refers the motion to a committee	No	Yes	Yes	Yes	Majority
11. Amend an amendment (secondary amendment)	Proposes a change to an amendments	No	Yes	Yes⁴	Νο	Majority
12. Amend a motion or resolution (primary amendment)	Proposes a change to a main motion	No	Yes	Yes⁴	Yes	Majority
13. Postpone indefinitely	Kills the motion	No	Yes	Yes	No	Majority
14. Main motion	Brings business before the assembly	No	Yes	Yes	Yes	Majority

1 Is debatable when another meeting is scheduled for the same or next day, or if the motion is made while no question Is pending

2 Unless no question is pending

3 Majority, unless it makes question a special order

4 If the motion it is being applied to is debatable



Discussion Protocols Board of Governors Meetings

Philosophical Statement:

"We take serious our representational responsibilities and will try to inform ourselves on the subject matter before us by contact with constituents, stakeholders, WSBA staff and committees when possible and appropriate. In all deliberations and actions we will be courageous and keep in mind the need to represent and lead our membership and safeguard the public. In our actions, we will be mindful of both the call to action and the constraints placed upon the WSBA by GR 12 and other standards."

Governor's Commitments:

- 1. Tackle the problems presented; don't make up new ones.
- 2. Keep perspective on long-term goals.
- 3. Actively listen to understand the issues and perspective of others before making the final decision or lobbying for an absolute.
- 4. Respect the speaker, the input and the Board's decision.
- 5. Collect your thoughts and speak to the point sparingly!
- 6. Foster interpersonal relationships between Board members outside Board events.
- 7. Listen and be courteous to speakers.
- 8. Speak only if you can shed light on the subject, don't be repetitive.
- 9. Consider, respect and trust committee work but exercise the Board's obligation to establish policy and insure that the committee work is consistent with that policy and the Board's responsibility to the WSBA's mission.
- 10. Seek the best decision through quality discussion and ample time (listen, don't make assumptions, avoid sidebars, speak frankly, allow time before and during meetings to discuss important matters).
- 11. Don't repeat points already made.
- 12. Everyone should have a chance to weigh in on discussion topics before persons are given a second opportunity.
- 13. No governor should commit the board to actions, opinions, or projects without consultation with the whole Board.
- 14. Use caution with e-mail: it can be a useful tool for debating, but e-mail is not confidential and does not easily involve all interests.
- 15. Maintain the strict confidentiality of executive session discussions and matters.



Discussion Protocols Board of Governors Meetings

Philosophical Statement:

"We take serious our representational responsibilities and will try to inform ourselves on the subject matter before us by contact with constituents, stakeholders, WSBA staff and committees when possible and appropriate. In all deliberations and actions we will be courageous and keep in mind the need to represent and lead our membership and safeguard the public. In our actions, we will be mindful of both the call to action and the constraints placed upon the WSBA by GR 12 and other standards."

Governor's Commitments:

- 1. Tackle the problems presented; don't make up new ones.
- 2. Keep perspective on long-term goals.
- 3. Actively listen to understand the issues and perspective of others before making the final decision or lobbying for an absolute.
- 4. Respect the speaker, the input and the Board's decision.
- 5. Collect your thoughts and speak to the point sparingly!
- 6. Foster interpersonal relationships between Board members outside Board events.
- 7. Listen and be courteous to speakers.
- 8. Speak only if you can shed light on the subject, don't be repetitive.
- 9. Consider, respect and trust committee work but exercise the Board's obligation to establish policy and insure that the committee work is consistent with that policy and the Board's responsibility to the WSBA's mission.
- 10. Seek the best decision through quality discussion and ample time (listen, don't make assumptions, avoid sidebars, speak frankly, allow time before and during meetings to discuss important matters).
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BOARD OF GOVERNORS

WSBA VALUES

Through a collaborative process, the WSBA Board of Governors and Staff have identified these core values that shall be considered by the Board, Staff, and WSBA volunteers (collectively, the "WSBA Community") in all that we do.

To serve the public and our members and to promote justice, the WSBA Community values the following:

- Trust and respect between and among Board, Staff, Volunteers, Members, and the public
- Open and effective communication
- Individual responsibility, initiative, and creativity
- Teamwork and cooperation
- Ethical and moral principles
- Quality customer-service, with member and public focus
- Confidentiality, where required
- Diversity and inclusion
- Organizational history, knowledge, and context
- Open exchanges of information



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BOARD OF GOVERNORS

GUIDING COMMUNICATION PRINCIPLES

In each communication, I will assume the good intent of my fellow colleagues; earnestly and actively listen; encourage the expression of and seek to affirm the value of their differing perspectives, even where I may disagree; share my ideas and thoughts with compassion, clarity, and where appropriate confidentiality; and commit myself to the unwavering recognition, appreciation, and celebration of the humanity, skills, and talents that each of my fellow colleagues bring in the spirt and effort to work for the mission of the WSBA. Therefore, I commit myself to operating with the following norms:

- I will treat each person with courtesy and respect, valuing each individual.
- I will strive to be nonjudgmental, open-minded, and receptive to the ideas of others.
- I will assume the good intent of others.
- I will speak in ways that encourage others to speak.
- I will respect others' time, workload, and priorities.
- I will aspire to be honest and open in all communications.
- I will aim for clarity; be complete, yet concise.
- I will practice "active" listening and ask questions if I don't understand.
- I will use the appropriate communication method (face-to-face, email, phone, voicemail) for the message and situation.
- When dealing with material of a sensitive or confidential nature, I will seek and confirm that there is mutual agreement to the ground rules of confidentiality at the outset of the communication.
- I will avoid triangulation and go directly to the person with whom I need to communicate. (If there is a problem, I will go to the source for resolution rather than discussing it with or complaining to others.)
- I will focus on reaching understanding and finding solutions to problems.
- I will be mindful of information that affects, or might be of interest or value to, others, and pass it along; err on the side of over-communication.
- I will maintain a sense of perspective and respectful humor.



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BOARD OF GOVERNORS

Anthony David Gipe President phone: 206.386.4721 e-mail: adgipeWSBA@gmail.com

November 2014

BEST PRACTICES AND EXPECTATIONS

✤ Attributes of the Board

- > Competence
- ➢ Respect
- > Trust
- Commitment
- > Humor

Accountability by Individual Governors

- Assume Good Intent
- Participation/Preparation
- Communication
- Relevancy and Reporting

Team of Professionals

- Foster an atmosphere of teamwork
 - o Between Board Members
 - o The Board with the Officers
 - o The Board and Officers with the Staff
 - \circ The Board, Officers, and Staff with the Volunteers
- ➢ We all have common loyalty to the success of WSBA

Work Hard and Have Fun Doing It



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Work Hard and Have Fun Doing It

WASHINGTON STATE BAR ASSOCIATION

TO: WSBA President Sunitha Anjilvel, WSBA Officers, Board of Governors, and Executive Director Terra Nevitt
FROM: Laurie A. Powers, General Counsel; Nina Crosby, Assistant General Counsel
DATE: April 25, 2025

RE: Amicus Curiae Request from King County Department of Public Defense

ACTION: Determine whether to authorize WSBA to file an amicus brief in a pending appeal to the WA Supreme Court of a King County Superior Court order requiring King County Department of Public Defense to handle cases in excess of the Washington State standards.

On April 14, 2025, WSBA's Help Desk received an amicus request (attached) from Toby Marshall of Terrell Marshall Law Group PLLC who is representing the King County Department of Public Defense (DPD) in a case pending before the Washington Supreme Court, *In re Detention of M.E.* Pursuant to section V of the <u>Amicus Curiae Brief Policy</u> approved by the Board of Governors on September 29, 2017, the President and the Executive Director are authorized to determine if there has been substantial compliance with the procedure to request amicus participation. The President and Executive Director determined that the request does substantially comply as to the procedural elements and now refer this matter to the Board of Governors for review and determination of whether to authorize the filing of the requested amicus. Although section IV of the Amicus Policy directs that amicus requests that have met the procedural requirements go to the Executive Committee for review and recommendation to the BOG, it is recognized that a primary purpose of the BOG is to act in-between scheduled meetings of the BOG. Given that the BOG is meeting this week, this matter is being referred directly to the BOG for review to avoid the need to schedule special meetings in the near future. It is anticipated that amicus briefs will be due in mid-to-late July, with oral argument in September 2025.

Analysis

This memorandum evaluates whether WSBA should file an amicus curiae brief in *In Re Detention of M.E.*, a case pending before the Washington Supreme Court. The King County Department of Public Defense (DPD) is challenging a King County Superior Court (Superior Court) order compelling DPD to assign counsel in Involuntary Treatment Act ¹(ITA) cases, despite attorneys being at maximum caseload capacity. This case presents issues regarding judicial overreach, ethical and constitutional obligations of public defenders, and the independence of public defense agencies.

DPD's opening brief (see attachment) thoroughly argues that the Superior Court exceeded its authority and that forcing attorneys to take on excess cases undermines ethical standards and the right to effective assistance of counsel. The BOG must assess whether an amicus brief from WSBA would offer a distinct contribution.

Overview of Case:

¹ Chapter 71.05 RCW

DPD is charged with managing and overseeing public defense services in the superior and district courts for King County, which includes representing respondents in commitment proceedings brought under the ITA. The King County code requires DPD to follow the "Washington State Standards for Indigent Defense²." DPD informed the Superior Court that its attorneys had reached their maximum caseload capacity for ITA cases³ and could not take additional assignments. Despite undisputed evidence of a lack of capacity, the Superior Court ordered DPD to appoint counsel in multiple cases, including that of respondent M.E. DPD now challenges the lawfulness of that order.

DPD argues this order improperly intrudes on its management authority, goes against WSBA Standards and ABA principles, and jeopardizes the constitutional right to effective assistance of counsel by requiring case assignments despite being at caseload capacity. The WSBA Standards limit caseloads to ensure effective representation and bar judicial management or oversight of public defense agencies. The Standards recognize that public defense providers, rather than courts, are best positioned to determine when workloads compromise ethical and constitutional obligations.

This case centers on whether a court may compel a public defense agency to assign attorneys to new cases even after the agency has documented that its attorneys are at capacity.⁴ DPD argues that this impedes:

- WSBA Standards for Indigent Defense Services, particularly those barring judicial management or oversight of public defense offices (Standard 3)
- Ethical rules governing professional obligations and limits on attorney workload
- Constitutional rights, including the Sixth Amendment guarantee of effective counsel

DPD is asking the Court to order lower courts not to interfere with the caseload management decisions of public defense attorneys. DPD petitioned for discretionary review. The Washington Supreme Court granted the petition and agreed to take the matter directly. While a date for oral argument has not yet been set, it is estimated that the argument will take place in September 2025, which would put the **amicus brief deadline in mid-to-late July**. *See* RAP 10.2(f)(1) (noting amicus briefs are due no later than 45 days before oral argument).

² King Cnty. Code § 2.60.026(A)(5) says: "The department of public defense shall be directed by the county public defender, whose duties include: **Following the Washington State Standards for Indigent Defense Services**." (emphasis added). It is unclear whether the King County Code is referencing the WSBA Standards for Indigent Defense Services or the Washington Court Standards for Indigent Defense. The King County Code may be referencing either one or both. Thus, DPD may not necessarily be misstating that they must comply with WSBA Standards, but rather overstating.

³ WSBA Standards and Court Standards both state that the maximum civil commitment caseload is 250 cases per year. See WSBA Standards 3.k; CrR Standard 3.4. This caseload limit has been in effect since at least 1989.

⁴ The issues raised in the brief are: 1) Whether the Superior Court exceeded its authority by interfering with DPD's independent power to manage and oversee public defense services, and 2) whether the Superior Court violated GR 42 by overriding DPD's public defense management and oversight decisions?

Criteria for Amicus Participation:

Per WSBA's Amicus policy, an amicus brief should meet several criteria:

A. Substantial Interest to the Bar

Before the Bar will participate as amicus curiae, the case must concern issues of substantial interest to the Bar. Cases are considered to be in an area of substantial interest to the Bar when issues in the case:

(1) concern the independence or integrity of the judiciary or the Bar; (2) concern the effectiveness or accessibility of the legal system; (3) concern the practice or business of law; (4) concern diversity or equality in the legal profession; or (5) are determined by 75% of the total membership of a section or other Bar entity to be of substantial interest to the Bar. This brief arguably touches on the first three factors.

Here, the case first raises questions about whether courts may override the judgments of public defense agencies regarding attorney workload. If courts can compel attorneys to disregard WSBA caseload limit guidelines, it potentially undermines the WSBA Standards. Second, the case raises concerns about the effectiveness and accessibility of the legal system, as the outcome may affect the ability to obtain competent representation. Third, the case directly affects the practice of law as it involves attorneys' ability to comply with professional and ethical standards. By ordering attorneys to take on cases beyond their capacity, public defenders must balance such court orders against their ethic obligations under the Rules of Professional Conduct (RPC). RPC violations directly impact WSBA's role in regulating the legal profession. For these reasons, the case is of substantial interest for WSBA.

B. Necessity of Amicus Brief

The second consideration for participation is the necessity of an amicus brief. WSBA will consider whether filed briefs provide the court with a complete picture of how the issue will impact WSBA's interests. WSBA will generally decline to participate as amicus curiae where the issues of concern to WSBA are already fully developed. This element essentially asks whether an amicus brief would be of value.

i. What the brief already touches on.

The brief first argues that the Superior Court exceeded its authority by overstepping DPD's power to manage and oversee public defense services. Within this argument, the brief notes that the DPD, tasked with managing public defense services, "must comply with the WSBA Standards." *See* Brief at pp. 37-39. Specifically, WSBA Standards establish a maximum number of cases per year to ensure effective representation. *See* WSBA Standards, Standard 3. Further, the brief notes that WSBA Standards specifically state that judges shall not manage or oversee public defense offices, which includes monitoring attorney caseload limits." WSBA Standards, Standard 19.

Moreover, the brief also argues that requiring public defenders to exceed caseload limits raises ethical and constitutional concerns, citing various WSBA Standards and RPCs. *See* Brief at pp. 56-64. Namely, the brief notes

that excessive caseloads impact professional conduct obligations to provide competent, diligent, and conflict-free representation. The brief also notes that an excessive caseload impacts the right to effective assistance of counsel.

ii. Areas WSBA could expand on.

The brief, while noting the ethical and professional concerns, leaves room to expand on the implications the issue will have on public defenders' ethical obligations. Specifically, an amicus brief could highlight that such orders compelling representation may lead to an increased risk of violating the Rules of Professional Conduct.

Further, an amicus can provide an overview of *why* the Standards were adopted. Specifically, the amicus can go into detail about the March 8, 2024, adoption of these new Standards limiting caseloads and details about what the BOG discussed, data collected, and why WSBA engaged in such efforts. This will highlight that WSBA's Standards reflect a consensus, informed by data, that ensures public defenders do not go over caseload capacities to ensure effective representation.

C. Other Considerations

- 1. The timeline to meet the mid-to-late July filing deadlines needs to be considered in terms of whether the issues of impact to the Bar can be adequately fleshed out and a high-quality brief prepared within that timeframe.
- 2. Also, when a private party brings a request for an amicus curiae brief to the Bar, the Policy calls for the Executive Committee to attempt to notify all parties of the receipt of the request prior to Committee action, to the extent practicable. Notice is also be posted on the Bar's website and sent to appropriate Bar sections and committees, to the extent practicable. Such notice will invite comment on whether the request meets the criteria set out in this policy and any deadline for comment, provided that the Executive Committee may make its recommendation to the BOG prior to receipt of comment by parties or others. Notably, posting of the request as described is not required prior to the BOG receiving a recommendation from the Executive Committee, which reasonably means that the BOG can act without receiving outside comment. Should the BOG wish to invite comment, notice could be posted, comments had been considered.

WSBA RISK ANALYSIS: This section is to be completed by the Office of General Counsel, with input from the proposing entity or individual.

See confidential materials in Box.

WSBA FISCAL ANALYSIS: This section is to be completed by the Finance Department, with input from the proposing entity or individual.

The fiscal impact of the proposal would primarily be to hiring outside counsel to assist with drafting the brief. The estimated cost is up to \$15,000, which could be supported through existing funds in the "Professional Fees-Legal" budget. Additionally, a minimal amount of staff time would be used to work with outside counsel and handle administrative matters related to the proposal. The staff time that would be allocated to this work is included in the overall duties of existing WSBA staff and would not require additional staff or allocation of resources from other internal sources.

WSBA EQUITY ANALYSIS: This section is to be completed by the Equity and Justice Team, with input from the proposing entity or individual.

The purpose of the equity analysis is to understand how entities incorporated an equity lens into the action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted by decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all. It appears that the people and communities most impacted include people who are entitled to competent, diligent, and conflict-free representation, public defenders who must abide by the Rules of Professional Conduct, and public defense agencies who must comply with the Standards. Seeking their input now could inform whether to submit an amicus brief; however, their perspectives and relevant data were considered in the drafting and approval of the Standards which may be referenced in deciding whether to submit an amicus.

Attachments

Amicus Brief Request King County Department of Public Defense's Opening Brief

From:	Toby Marshall
То:	Questions
Subject:	[External]Amicus Request In re Detention of M.E., Wash. Supreme Court Case No. 1032528
Date:	Monday, April 14, 2025 11:22:36 AM
Attachments:	King County Department of Public Defense"s Opening Brief.pdf.pdf

You don't often get email from tmarshall@terrellmarshall.com. Learn why this is important

Dear Amicus Curiae Brief Committee:

My name is Toby Marshall, and I represent the King County Department of Public Defense (DPD) in a case pending before the Washington Supreme Court: *In re Detention of M.E.* I'm writing to respectfully ask whether the WSBA will consider authoring or signing on to an amicus brief in support of DPD's positions. Under RAP 10.2(f)(1), amicus briefs are due no later than 45 days before oral argument, but that date has not yet been set. I estimate argument will take place in September 2025, which would put the amicus brief deadline in mid-to-late July.

Like many public defense agencies in Washington, DPD has faced difficulty recruiting and retaining attorneys. This is especially true as to attorneys who represent respondents in proceedings under the Involuntary Treatment Act (ITA), chapter 71.05 RCW. Over the course of several months in 2024, all attorneys in DPD's ITA unit reached their caseload capacities under the WSBA's Standards for Indigent Defense Services. When this happened, DPD informed the King County Superior Court that it could not take new assignments for a period of time. Though DPD provided the superior court with ample, and undisputed, evidence that its ITA attorneys had reached caseload limits, the court nevertheless ordered DPD to take on dozens of additional ITA cases.

DPD petitioned for discretionary review in one of those cases, and the Washington Supreme Court granted the petition and agreed to take the matter directly. In its opening brief, which is attached, DPD presents two issues for the Court's review: (1) Did the superior court exceed its authority by interfering with DPD's independent power to manage and oversee public defense services? (2) Did the superior court violate GR 42 by overriding DPD's public defense management and oversight decisions? DPD is asking the Court to answer both questions in the affirmative, making clear that lower courts cannot interfere with the reasoned and supported caseload management decisions of public defense attorneys. This includes the decision to decline additional case assignments when there is no capacity under applicable standards, including the WSBA's Standards for Indigent Defense Services.

DPD would greatly appreciate any support that the WSBA is willing to provide as amicus curiae in this matter. If you need further information or want to discuss anything, please let me know.

We thank you for your consideration and look forward to your response.

Best regards,

Toby

Toby J. Marshall (he, him, his)

Terrell | Marshall Law Group PLLC

936 N 34th Street, Suite 300 | Seattle, WA 98103 T 206.816.6603 | F 206.319.5450 terrellmarshall.com FILED SUPREME COURT STATE OF WASHINGTON 3/26/2025 11:45 AM BY SARAH R. PENDLETON CLERK

No. 1032528

IN THE SUPREME COURT OF THE STATE OF WASHINGTON

IN RE DETENTION OF M.E.,

PETITIONER KING COUNTY DEPARTMENT OF PUBLIC DEFENSE'S OPENING BRIEF

Toby J. Marshall TERRELL MARSHALL LAW GROUP PLLC 936 North 34th Street, Suite 300 Seattle, Washington 98103 Telephone: (206) 816-6603 Facsimile: (206) 319-5450

Attorneys for Petitioner King County Department of Public Defense

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I. INTRODUCTION

The right to assistance of counsel is a fundamental principle in our system of justice. To satisfy that right, the representation provided must be effective. And to be effective, the representation must be ethical. The formal appointment of an attorney who lacks the capacity to competently and diligently defend a client will not suffice.

The Washington State Bar Association (WSBA) and this Court have developed standards aimed at ensuring that public defense attorneys can give each client the time and effort necessary for effective representation. Two of these standards are critical to achieving that goal. The first involves maximum caseload limits. The second involves independence from judicial influence and control.

Petitioner King County Department of Public Defense (DPD) is charged with managing and overseeing public defense services in the superior and district courts for King County. DPD's

responsibilities include tracking the caseloads of staff attorneys, evaluating their work, and monitoring compliance with standards, policies, and contractual obligations. If the number of cases coming into the Department exceeds the overall capacity of its attorneys, DPD must inform the court that the Department is unable to take additional assignments until further notice.

Like other public defense agencies in this state (and, indeed, across the country), DPD has struggled to retain attorneys and replace those who depart. The Department engages in extensive recruitment efforts, seeking both to hire internally and to secure contracts with external "capacity" counsel, but the shortage of attorneys continues.

Among its clientele, DPD represents respondents in commitment proceedings brought under the Involuntary Treatment Act (ITA), chapter 71.05 RCW. The ITA court in King County is a busy one, with approximately 5,000 cases per year on average. In April 2024, DPD determined that the attorneys in its

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ITA unit, both internal and external, had reached their monthly caseload capacities a week before the month ended. Accordingly, DPD informed the superior court that it could not take further case assignments until May 1.

With a week remaining in May, DPD once again found its ITA attorneys had reached their monthly caseload capacities. When DPD informed the superior court that further case assignments would be declined, a commissioner of the court ordered the Department to "promptly appoint counsel" for respondents in more than 40 cases.

Because this issue was certain to recur, the superior court ordered an evidentiary hearing regarding DPD's capacity to represent ITA respondents. DPD submitted several declarations and supporting documents, detailing its duties under applicable standards, its methods for monitoring attorneys and tracking caseloads, its capacity contracts, and its recruitment efforts. The court took briefing and heard argument on June 28, 2024.

A few hours before the hearing, DPD informed the court that it had again reached maximum capacity and would be unable to cover 14 pending ITA cases. M.E.'s case was one of them. Though the evidence regarding DPD's lack of capacity was undisputed, the court ordered DPD to assign an attorney to represent M.E.

DPD challenges the lawfulness of that order.

II. ASSIGNMENT OF ERROR AND ISSUES

A. Assignment of error.

The superior court erred by ordering DPD to assign an attorney to represent M.E.

B. Issues pertaining to assignment of error.

 Did the superior court exceed its authority by interfering with DPD's independent power to manage and oversee public defense services? Yes.

2. Did the superior court violate GR 42 by overriding DPD's public defense management and oversight decisions? **Yes.**

III. STATEMENT OF THE CASE

A. DPD is responsible for managing and overseeing public defense services in King County.

The Washington legislature has determined "that effective legal representation must be provided for indigent persons . . . consistent with the constitutional requirements of fairness, equal protection, and due process in all cases where the right to counsel attaches." RCW 10.101.005. A person qualifies as "indigent"—and the right to counsel attaches—if they are "[i]nvoluntarily committed to a public mental health facility." RCW 10.101.010(3)(b); see also, e.g., RCW 71.05.148(6)(d) ("respondent shall be represented by counsel"); RCW 71.05.230(6) (court must "appoint[] counsel to represent [detaind] person" before probable cause hearing); RCW 71.05.300(2) ("court shall immediately appoint an attorney to represent him or her").

To ensure that effective representation is provided in all cases, the legislature requires each county to "adopt standards for the delivery of public defense services," including standards addressing "duties and responsibilities of counsel, case load limits and types of cases," and "monitoring and evaluation of attorneys." RCW 10.101.030. "The legislature recommends that the standards governing indigent public defense promulgated by the Washington State Bar Association (WSBA) should serve as guidelines to local authorities in adopting their own standards." *Davison v. State*, 196 Wn.3d 285, 297 (2020) (citing RCW 10.101.030).

In 2013, the King County Council established DPD as an executive department "responsible for managing . . . the provision of public defense services" in the county's superior and district courts. King Cnty. Code § 2.60.020(A); *see also* King Cnty. Charter § 350.20.60 ("Additional duties may be prescribed by ordinance."). This includes defense services provided to respondents in judicial proceedings brought under the Involuntary Treatment Act, chapter 71.05 RCW. *See* King Cnty. Code § 2.60.050(A) ("commitment proceedings"); RCW 10.101.020(1).

DPD must "assign counsel in a manner that avoids conflicts of interest." King Cnty. Code § 2.60.035(A). And it must render services "in an efficient manner that ensures effective representation." King Cnty. Code § 2.60.020(B)(2).

DPD is "directed by the county public defender." King Cnty. Code § 2.60.026(A); *see also* King Cnty. Charter § 350.20.61. In carrying out her duties, the county public defender is obligated to follow the WSBA State Standards for Indigent Defense Services (the "WSBA Standards"). King Cnty. Code § 2.60.026(A)(5). The county public defender is also obligated to ensure that the American Bar Association Ten Principles for a Public Defense Delivery System "guide the management of the department and development of department standards for legal defense

representation." King Cnty. Code § 2.60.026(A)(4).

- B. DPD attorneys are limited to a maximum of 250 ITA cases annually on a full-time basis, and DPD must ensure an even distribution of those cases throughout the year.
 - 1. <u>The maximum annual ITA caseload is 250 cases</u>.
 - a. The WSBA Standards

"The WSBA Standards detail the minimum requirements for attorneys representing individual clients and for state and local administrators," like the county public defender, "who 'manage and oversee' public defense services." *Standards for Indigent Defense Services* (Wash. State Bar Ass'n Mar. 8, 2024) (*WSBA Standards*), Introduction. These minimums are "necessary to ensure [that] legal representation for clients represented by a public defense attorney meets constitutional, statutory, and ethical requirements." *Id*.

Under the WSBA Standards, every "contract or other employment agreement or government budget" for public defense services "shall specify the types of cases for which representation shall be provided and the maximum number" of cases per type. *Id.*, Standard 3.A. The maximum number "assume[s] [that] an attorney's public defense work is . . . fulltime (exclusively public defense)" and that the cases being handled are "of average complexity and effort" and "reasonably distributed throughout the year." *Id.*, Standard 3.D.

For an attorney handling civil commitments, the maximum caseload is 250 cases per year. *Id.*, Standard 3.K. A "case" is defined as "a new court filing or action that names a person who is eligible for appointment of a public defense attorney." *Id.*, Definitions. For cases brought under chapter 71.05 RCW, this is the civil commitment petition. *Id*.

b. The Court Standards

In addition to the WSBA Standards, DPD and its attorneys are bound by the Court's Standards for Indigent Defense (the "Court Standards"), which are set forth in CrR 3.1, CrRLJ 3.1, JuCR

9.2, and MPR 2.1. Like the WSBA Standards, the Court Standards"address certain basic elements of public defense practicerelated to the effective assistance of counsel." MPR 2.1Standards, Preamble.

Under the Court Standards, each public defense contract or other employment agreement "shall specify the types of cases for which representation shall be provided and the maximum number of cases which each attorney shall be expected to handle." *Id.*, Standard 3.1. These limits "reflect the maximum caseloads for fully supported full-time defense attorneys for cases of average complexity and effort in each case type specified." *Id.*, Standard 3.3. "Caseload limits assume a reasonably even distribution of cases through the year." *Id*.

For DPD's ITA attorneys, the caseload limit is "250 Civil Commitment cases per attorney per year." *Id.*, Standard 3.4. "A case is defined as the filing of a document with the court naming a person as . . . respondent, to which an attorney is appointed in order to provide representation." *Id.*, Standard 3.3.

The Court Standards "require attorneys to certify to the courts that they comply with caseload limits" *Davison*, 196 Wn.2d at 299. Each attorney must file this certification "on a quarterly basis in each court in which the attorney has been appointed as counsel." MPR 2.1 Standards, Certification of Compliance.

c. DPD's contractual obligations

In the labor agreement that applies to its line attorneys, DPD is obligated to adhere to both the WSBA Standards and the Court Standards, including the limitation in each of 250 ITA cases per attorney per year. CP 55-57, 65, 114-15, 142; *see also* MPR 2.1 Standards, Standard 3.1; *WSBA Standards*, Standard 3.K. "DPD recognizes" in the agreement "that caseloads must be limited to ensure King County public defenders are able to provide high quality representation to their clients." CP 115. If DPD were to violate the applicable standards—for example, by assigning ITA cases to line attorneys that exceed the limit—the union representing the attorneys "would be required to take action on behalf of its attorney members, including at a minimum, commencement of the grievance procedures laid out in [the labor agreement]." CP 58. The union could also "initiate a separate cause of action against [DPD] for a violation of the [labor agreement] and for forcing attorneys to choose between accepting cases over the established caseload maximums (and violating their ethical obligations) or potentially ending their employment." CP 59, 65.

2. <u>DPD monitors caseload capacities monthly</u>.

As noted above, "[c]aseload limits require a reasonably even number of case appointments each month, based on the number of cases appointed in prior months." *WSBA Standards*, Standard 3.L; *see also* MPR 2.1 Standards, Standard 3.3. To meet this requirement, DPD works to ensure that ITA attorneys "average no more than 20.8 cases per month" or "62.5 cases per quarter." CP 66. DPD determines the monthly capacity for each attorney "by summing the number of cases [that] attorney was assigned in the prior 11 months and subtracting that number from 250." *Id*. For example, an ITA attorney "who received 230 cases from June 2023 through April 2024 can be assigned 20 cases in May 2024." *Id*. At that point, the attorney will have been assigned the maximum of 250 ITA cases for the year June 1, 2023, to May 31, 2024. *Id*.¹

¹ If an attorney transfers into DPD's ITA unit from a different practice area, "credits from that prior practice area are converted into ITA credits so that the attorney maintains a yearly rolling total consistent with the caseload limit of their current practice area." CP 66-67; *see also WSBA Standards*, Standard 3.E ("If a public defense attorney accepts appointment to cases from more than one case type, this standard should be applied proportionately to determine a maximum full caseload."); MPR 2.1 Standards, Standard 3.3 ("If a defender . . . is carrying a mixed caseload . . . these standards should be applied proportionately to determine a full caseload.").

If DPD assigns more than 20.8 ITA cases to a full-time attorney in one or more months, it must compensate in subsequent months by assigning fewer cases to that attorney. CP 67. Otherwise, the attorney would reach the annual maximum of 250 cases in fewer than 12 months and would "face the possibility of sitting idle for however long it takes for the prior over-assignment months to 'drop off'" such that the total count over the 11-month-lookback period is fewer than 250. *Id*.

C. DPD's ITA attorneys regularly work at maximum caseload capacity.

King County has a very busy ITA court. *See* CP 67, 72. From July 2023 to June 2024, DPD assigned attorneys to represent respondents in approximately 4,900 ITA cases. CP 67. The court reached a high of 5,600 ITA cases in 2022. CP 342.

These figures exceed DPD's capacity for representation. *See* CP 66-72. As of June 2024, DPD had 14 attorneys and two supervisors in its ITA practice area. CP 70. Because those supervisors were each managing at least seven attorneys, their supervisory duties were considered "a full-time assignment" that "normally" precluded them from taking cases. CP 70, 142. DPD nevertheless assigned some cases to the supervisors, though it was contractually obligated to limit those assignments to "unusual overflow situations." *Id*. The supervision of one attorney is deemed to be "equivalent to 10% of the caseload limits"; thus, DPD could not assign more than 6.25 cases per month to supervisors when they were representing respondents. CP 142.

In June 2024, DPD had three contracts with private attorneys to handle a total of 55 ITA cases per month. CP 70. DPD began entering contracts like this while facing a capacity crisis in 2023. CP 69. These contracts, which are allowed by ordinance, comply with WSBA guidelines. *Id*. (citing King Cnty. Code § 2.60.035(B)).

As shown by the above data, DPD's capacity for ITA cases was substantially below the number of cases being filed in King County during 2024. Fourteen attorneys working on a full-time basis could cover a maximum of 3,500 ITA cases per year.² Two supervisors handling ITA cases on a 30-percent basis could ostensibly cover a maximum of 150 additional ITA cases per year,³ though such case assignments are supposed to be "temporar[y]." CP 142. The private attorneys with whom DPD contracted could cover a maximum of 660 ITA cases per year.⁴

DPD's annual capacity in 2024 was thus no more than 4,310 ITA cases,⁵ a figure substantially below the range of 4,900 to 5,600 seen in recent years. *See* 67, 342. This shortfall is

- ³ The formula for this calculation is 250 * 0.3 * 2 = 150.
- ⁴ The formula for this calculation is 55 * 12 = 660.
- ⁵ The formula for this calculation is 3,500 + 150 + 660 = 4,310.

² The formula for this calculation is 14 * 250 = 3,500.

expected to "be ongoing and worsening," as King County "will continue to expand" ITA case filings "through the coming years with the [introduction of] additional ITA beds." CP 72.

D. DPD makes good-faith efforts to hire attorneys internally and secure additional contracts with external counsel, but those efforts have thus far proved unsuccessful.

DPD works hard to recruit qualified attorneys for internal hiring as well as external contracting. CP 47-49, 70-71. Despite these efforts, DPD has been unable to fill its vacancies or obtain contracts sufficient to cover all ITA cases. CP 48, 70, 312.

1. <u>DPD's efforts to hire internally</u>.

DPD continuously posts employment opportunities with organizations like the Washington Defender Association, the WSBA, the King County Bar Association, and Idealist, a socialimpact job board. CP 70. DPD also advertises available positions on LinkedIn. *Id*.

DPD engages in various outreach efforts to boost its profile in the labor market. *Id*. For example, staff members speak at law schools and attend job fairs in Washington and around the country. *Id*. DPD cultivates relationships with law professors, especially clinical professors, to encourage a pipeline of interested candidates. *Id*. And DPD undertakes advocacy work and high-profile litigation, which it believes helps to create visibility with people interested in racial and social justice. CP 71.

For the past two years, DPD has offered higher attorney salaries to make the organization more attractive to prospective employees. *Id*. DPD has done this by starting new attorneys at the second step of the salary scale and by offering lateral attorneys more credit for prior experience. *Id*. DPD has also worked with the unions to obtain a retention bonus for attorneys qualified to take Class A cases, which DPD hopes will help the Department retain as well as recruit employees. *Id*.

2. <u>DPD's efforts to contract with outside counsel</u>.

Since 2020, DPD has been soliciting and signing "capacity contracts" without private attorneys. CP 47. The purpose of

these contracts is to ensure that representation is provided "in cases where DPD determines it cannot assign an attorney from within a given Department division for reasons other than a conflict of interest."⁶ CP 47-48. DPD "use[s] capacity counsel primarily in situations where a division [of DPD] lacks the operational capacity to accommodate the cases." CP 48. This includes ITA cases. CP 69.

DPD has solicited proposals for capacity contracts from qualified law firms, non-profit organizations, and solo practitioners. CP 48-49. DPD has also cold-called attorneys in surrounding counties and contacted former DPD employees to get them to engage in capacity coverage. *Id*. DPD struggles to find sufficient contractors for all practice areas, but "[t]he number of

⁶ DPD has a separate "Conflict Counsel Panel" of private attorneys who may be willing to accept cases where a conflict of interest prevents DPD from engaging in representation. CP 47. But these attorneys do not sign "formal contracts for an agreed set volume of work." *Id*.

attorneys willing and able to provide representation in ITA cases is extremely limited." *Id*.

As of June 2024, DPD was able to maintain only three ITA capacity contracts. CP 48. Two of those contracts were for 20 cases each per month, and one was for 15 cases per month. *Id*.

3. <u>DPD has been unable to fill the void</u>.

Despite its efforts, DPD has been unable to reach the internal and external staffing levels necessary to cover all the ITA cases filed in King County. CP 49, 70.

DPD is not alone. CP 49, 53, 312. As stated in a press release from Washington Courts last summer, public defense providers throughout the state are "facing a crisis of attrition and an inability to recruit staff brought about by excessive workloads and poor compensation." Press Release, Wash. Courts, Proposed Changes to Wash. Supreme Court Pub. Defense Standards Open for Pub. Comment by Oct. 31 (July 17, 2024) (quoting Washington State Bar Association and Counsel on Public Defense).⁷ Indeed, "more than 87 percent of Washington counties [have] reported facing challenges in recruiting and retaining a sufficient pool of defense attorneys." CP 71.

E. As it was obligated to do, DPD began declining assignments when its ITA attorneys reached caseload capacity.

The purpose of caseload limits is to ensure that public defense attorneys have the ability "to give each client the time and effort necessary to ensure effective representation." *WSBA Standards*, Standard 3.B; MPR 2.1 Standards, Standard 3.2. Accordingly, when DPD's line attorneys have reached their caseload capacities and contract attorneys are unable to handle the overflow, DPD "must notify courts and appointing authorities that [the Department] is unavailable to accept additional assignments and must decline to accept additional cases." *WSBA*

⁷ Available at

https://www.courts.wa.gov/newsinfo/?fa=newsinfo.pressdetail& newsid=50456.

Standards, Standard 3.B; see also MPR 2.1 Standards, Standard 3.2 ("Neither defender organizations, county offices, contract attorneys, nor assigned counsel should accept workloads that, by reason of their excessive size, interfere with the rendering of quality representation."); *Ten Principles of a Public Defense Delivery System*, Principle 3 (Am. Bar Ass'n 2023) (*ABA Ten Principles*) ("If workloads become excessive, Public Defense Providers are obligated to take steps necessary to address [the issue], which can include notifying the court or other appointing authority that the Provider is unavailable to accept additional appointments").

In April 2024, DPD determined that it had "reached capacity" with respect to ITA cases. CP 323. As a result, DPD informed the superior court that the Department would be ceasing case assignments for the remainder of the month:

> We can accept 2 more cases internally, and, pursuant to contracts entered with private attorneys, we will be able to assign three cases

via that route on Friday, Monday, and Tuesday. DPD will assign those cases in the order they appear on the whiteboard. DPD will otherwise not assign attorneys to cases until May 1st.

Id. In support of this decision, DPD cited Standards 3.3 and 3.4 of the Court Standards, King County Code Section 2.60,026(A)(5), the WSBA Standards, "and DPD's labor contracts." CP 322-23.

DPD agreed to keep the superior court informed regarding the Department's capacity moving forward. CP 322. On May 16, 2024, for example, DPD provided a status update for the month: "We believe we have the capacity to take approximately 115 more cases in DPD, and to assign approximately 3 cases per day to assigned counsel." CP 322.

The following week, DPD wrote the court to state that its ITA capacity was down to "approximately 30 more cases." CP 321. DPD supported this assertion with a declaration from the Department's Deputy Director, who outlined DPD's process for determining capacity. *Id.; see also* CP 63. The email concluded:

"[We] do not believe [that] we will have enough capacity to assign all respondents counsel this month. [We] will email the court when [we] have more precise information regarding when DPD will run out of capacity." CP 321.

Two days later, DPD sent the following email to the

superior court:

DPD assigned 12 cases internally on Thursday and will assign 10 cases today. Next week, DPD will reach capacity under Standards 3.3 and 3.4 of CrR 3.1, and, <u>without an order of the court</u> <u>directing DPD to make assignments in excess of</u> <u>court rule maximum</u>, will not be able to assign all the cases referred to us on Tuesday 5/28— Friday 5/31.

CP 320-21 (emphasis in original).

On May 28, 2024, "DPD was able to assign counsel to only

11 more ITA respondents." CP 72. DPD informed the court that

the Department was unable to represent the remaining

respondents because all ITA attorneys "had reached their

caseload limit." *Id.; see also* CP 544.

F. The superior court ordered DPD to appoint counsel to dozens of respondents even though DPD lacked capacity.

On May 29, 2024, a commissioner of the superior court entered 37 orders directing DPD to "promptly appoint counsel for respondent in the above captioned case, without delay." CP 163-277. The following day, the commissioner entered six more of these orders. CP 278-95.

All 43 orders were identical save for the case number, the name of the respondent, and the location of the respondent's custody. *See generally* CP 163-295. Each began with four findings. *See, e.g.,* CP 166-67. The superior court first found that DPD "is charged with providing attorneys to those individuals involuntarily detained under the Involuntary Treatment Act (ITA) in order to protect their state and federal constitutional rights." CP 166. In the next two findings, the Court summarized DPD's efforts in April and May 2024 to communicate that the Department "had reached maximum caseload limits for the

attorneys who are currently assigned to represent ITA patients."

Id. Finally, the court found that "DPD has not assigned an

attorney to represent the respondent herein." CP 167.

Each order also contained the following six conclusions of

law:

- 1. It is the King County Prosecuting Attorney's Office (KCPAO) duty to represent individuals or agencies petitioning for involuntary treatment or detention.
- 2. It is the Court's statutory and constitutional obligation to ensure that counsel is provided to ITA respondents.
- 3. It is the DPD's obligation to provide counsel to ITA patients as provided by contract with the King County Executive and as ordered by the Court.
- 4. It is the Court's obligation to ensure that ITA respondents have access to court hearings in a timely manner, as is required by the ITA and our state and federal constitution.
- 5. It is also the Court's obligation to ensure that ITA respondents do not languish in hospitals or flood emergency rooms as a result of a failure to have their cases litigated.

 The Court has considered and balanced the needs of DPD attorneys to handle manageable caseloads against the constitutional rights of those involuntarily detained pursuant to RCW 71.05 and/or RCW 71.34.

Id.

In every order, the commissioner of the superior court set "a tentative Show Cause Hearing" for June 14, 2024. CP 490; *see also generally* CP 163-295. The hearing was contingent on DPD being "unwilling or unable to comply" with the court's instruction to appoint counsel. CP 168.

On May 31, 2024, the Director of DPD filed with this Court a petition against the superior court commissioner, seeking a writ of review or, in the alternative, prohibition. *See* CP 4, 490.⁸ Shortly thereafter, the judge overseeing the ITA court ordered DPD to appear at a show-cause hearing on June 14, 2024. CP 490. DPD amended its petition to this Court to substitute the judge in

⁸ The petition was assigned Washington Supreme Court Case No. 103134-3. DPD eventually withdrew it.

place of the commissioner. *Id*. DPD then moved to continue the show-cause hearing. *Id*.

The superior court struck the June 14 show-cause hearing and scheduled an evidentiary hearing for June 28, 2024. CP 491. In the order, the court wrote that it was obligated "to ensure that counsel is provided to ITA respondents . . . that ITA respondents have access to court hearings in a timely manner . . . [and] that ITA respondents do not languish in hospitals or flood emergency rooms as a result of a failure to have their cases litigated." CP 490. The court also stated that it was obligated "to create a full and accurate record for appellate purposes and to document the factors the Court considered in arriving at its decision" in each of the 43 orders of May 29 and 30, 2024. *Id*.

"To fulfill the above obligations," the court required DPD to produce "documented evidence relating to efforts by . . . DPD to ensure that ITA respondents have representation." CP 491. The court wrote that "[s]uch evidence shall include, at a

minimum" labor agreements involving DPD personnel; information on DPD's efforts to hire internally; documents showing "the mechanism by which the Executive has designated DPD as the entity responsible for securing agreements with non-DPD attorneys to perform ITA work"; information relating to efforts to secure such agreements; the standards by which DPD determines caseloads; and "[i]nformation showing how the time and effort required for a particular ITA case are measured." *Id*.

On June 14, 2024, DPD complied with the superior court's order, submitting three declarations that outlined DPD's jurisdiction, labor relations, caseload policies and practices, management of ITA attorneys, and efforts to hire internally as well as contract with private counsel for the representation of ITA respondents. CP 47-300. DPD also filed a brief in which it argued that the court "lacks the authority to order DPD to appoint attorneys to represent respondents when doing so will

result in those attorneys exceeding the caseload limits" CP

37; see also CP 47-300.

G. The superior court continued ordering DPD to represent ITA respondents despite the Department's lack of capacity, and DPD sought discretionary review.

On June 24, 2024, DPD once again informed the superior court that the Department was facing capacity issues with respect to ITA cases. CP 320. Four days later, DPD listed 14 ITA cases by case number and wrote, "DPD will not be assigning counsel" to these cases "absent a court order." CP 317. M.E. was the respondent in one of those cases. *Id.; see also* CP 1, 4.

Later that day, the superior court held its evidentiary hearing on DPD's capacity to represent ITA respondents. *See* CP 397-447. After the hearing, the court entered an Order Requiring DPD to Appoint Counsel in M.E.'s case. CP 1-3. The court's order referenced communications from April, May, and June regarding DPD's lack of capacity and set forth the same conclusions of law that were included in each of the 43 May orders. *Id*. DPD complied with the order and assigned an attorney to represent M.E. CP 5.

Eleven days later, the superior court entered an Amended Order Requiring DPD to Appoint Counsel in M.E.'s case, which is the order before this Court on review. CP 4-9, 12-21. In the amended order, the superior court stated that it had requested an evidentiary hearing, in part, "because DPD had informed the [c]ourt that [the Department's lack of capacity for ITA cases] would be an ongoing issue." CP 4; see also CP 330. The court also stated that "[t]he briefing submitted in response to the June 7 Order for Supplemental Briefing and Setting of Evidentiary Hearing and the facts and arguments presented at the June 28 hearing are as relevant to the initial group of 43 cases as they are to [M.E.'s] case." CP 5. Accordingly, the court incorporated by reference the briefing, declarations, and arguments. CP 4.

In its conclusions, the court acknowledged that the "Executive Branch" of King County "elected to have DPD provide

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counsel to ITA respondents as required by the Revised Code of Washington (RCW), the King County Code (KCC), the King County Charter, and the Washington State Constitution." CP 6. The court also acknowledged that the Executive "understand[s] Court Rules and County Ordinance prohibit [the Executive's] involvement in DPD operations except for budgetary issues." *Id.; see also ABA Ten Principles*, Principle 1 ("Public Defense Providers and their lawyers should be independent of political influence");⁹ *American Bar Association Eight Guidelines of Public Defense Related to Excessive Workloads*, Guideline 7 cmt. (Am. Bar Ass'n 2009) (*ABA Eight Guidelines*) ("defense services should be independent of the ... executive branches of government");¹⁰ King Cnty. Code

⁹ In the Court Standards, these principles are cited as one of several "Related Standards." *See* MPR 2.1 Standards, Standard 3.

¹⁰ These guidelines are also cited in the Court Standards as one of several "Related Standards." *See* MPR 2.1 Standards, Standard 3.

§ 350.20.60 ("Elected officials shall not interfere with the

exercise of the[] duties" of DPD.).

The superior court then turned to DPD's evidence and

arguments regarding ITA caseloads, writing:

Through emails, declarations and filings, the DPD indicated they were at capacity and had reached the case load standard as indicated by the Washington Supreme Court and Washington State Bar Association. They argue that these standards are mandatory and that they cannot exceed them. They have also indicated that there are shortages of attorneys in their office and that they are unable to fill these positions despite intense and frequent recruitment. The DPD has also indicated that there are no budgetary reasons why they do not have attorneys, but rather, they simply cannot find attorneys to fill these positions. As a result, the attorneys DPD assigned to their ITA unit were at capacity per the case standards as of June 28, 2024 [the day that the court ordered DPD to represent M.E.].

CP 6.

As with the initial 43 orders, the superior court stated that

it has an obligation "to ensure that ITA respondents have access

to counsel," that "all rights of ITA respondents are protected," and that "timely court hearings [occur] so the merits of the litigation may be heard." *Id*. The court then wrote that it "has inherent power to preserve the administration of justice," a "judicial function [that] extends beyond the determination of questions in controversy and includes functions necessary or incidental to the adjudicative role." CP 6-7 (quoting *Matter of Salary of Juvenile Dir.*, 87 Wn.2d 232, 242 (1976)).

Finally, the superior court recognized that "[i]t is solely the DPD's responsibility to manage and allocate attorney resources and determine case assignments." CP 7. Nevertheless, the court held that DPD must "fulfill its statutory and constitutional obligations by providing an attorney to respondent." *Id.* "Who that attorney is and where they come from and what caseloads they carry," the court wrote, "is a decision for . . . DPD." CP 7-8.

DPD moved for discretionary review under RAP 2.3(b)(2) and RAP 2.3(b)(4). DPD simultaneously filed a statement of

grounds for direct review under RAP 4.2(a)(4). On November 6, 2024, the Court granted DPD's motion and retained the case for hearing and decision. The Court consolidated the matter with *In re the Detention of R.S.*, a case that involves a virtually identical assignment order and that was accepted for direct review based on a motion filed by the King County Executive.

IV. ARGUMENT

A. The standard of review is *de novo*.

DPD maintains the superior court exceeded its authority when it ordered DPD to assign an attorney to represent M.E. "Whether a court has exceeded its authority is a question of law reviewed de novo." *State v. Buck*, 2 Wn.3d 806, 812 (2024); *see also Matter of Dependency of A.M.-S.*, 196 Wn.2d 439, 448 (2020) ("The scope of a court's inherent authority is a question of law reviewed de novo.").

DPD also maintains the superior court violated GR 42. "This [C]ourt interprets court rules the same way it interprets statutes, using the tools of statutory construction." *State v. Hawkins*, 181 Wn.2d 170, 183 (2014). Thus, the "application" of a court rule "to a specific set of facts is a question of law reviewed de novo." *Id*.

B. The superior court exceeded its authority by interfering with DPD's independent power to manage and oversee public defense services.

King County has charged DPD with responsibility for managing public defense services in superior and district courts. King Cnty. Code § 2.60.020(A). In carrying out its duties, DPD must comply with the WSBA Standards. King Cnty. Code § 2.60.026(A)(5). To provide public defense attorneys with "the time and effort necessary to ensure effective representation," the WSBA has established an annual maximum of 250 civil commitment cases per year on a full-time basis. *Id.*, Standard 3. These cases must be distributed in a manner that provides "a reasonably even number of case appointments each month, based on the number of cases appointed in prior months." *Id*. The superior court correctly recognized "DPD's responsibility to manage and allocate attorney resources and determine case assignments." CP 7. And the court was aware that DPD's ITA attorneys were all "at or above the caseload limits" set by the WSBA as of June 28, 2024. CP 5-6. Nevertheless, the court ordered DPD to represent M.E. CP 1-9.

The superior court's order was in error. The court exceeded its authority by interfering with DPD's public defense management and oversight powers and overriding DPD's caseload capacity determinations. This conclusion is supported by applicable standards and the decisions of courts in Washington and other states.

1. <u>Applicable standards give DPD the independence to</u> <u>monitor caseloads and decline appointments when</u> <u>attorneys are at capacity</u>.

The WSBA Standards provide that "[j]udges and judicial staff shall not manage [or] oversee public defense offices"; rather, this should be done by "[a]ttorneys with public defense experience" who are "insulated from judicial and political influence." *WSBA Standards*, Standard 19. The terms "manage" and "oversee" include "monitoring attorney caseload limits" and "monitoring compliance with contracts, policies, procedures, and standards." *Id*.

"If a public defense agency or nonprofit's workload exceeds the Director's capacity to provide counsel for newly assigned cases, the Director must notify courts and appointing authorities that the provider is unavailable to accept additional assignments and must decline to accept additional cases." *WSBA Standards*, Standard 3.B. This determination "should be accorded substantial deference because Providers are in the best position to assess the workloads of their lawyers." *ABA Eight Guidelines*, Guideline 7 cmt.¹¹ "While it is appropriate for judges to review

¹¹ The WSBA Standards explicitly cite to the ABA Eight Guidelines of Public Defense Related to Excessive Workloads. *See WSBA Standards*, Standard 3.C n.9 & App. D. As noted above, these

motions asking that assignments be stopped," they "should not undertake to micro-manage the operations of defense programs." *Id*. To the contrary, "the judiciary needs to ensure that Providers and their lawyers are not forced to accept unreasonable numbers of cases." *Id*.

DPD regularly monitors its ITA attorneys and in April, May, and June of last year, DPD determined that all of those attorneys had reached their monthly caseload capacities early. CP 66-67, 160, 316-24, 544. In each instance, DPD appropriately notified the court that the Department could no longer take assignments for the remainder of the month. CP 4-6, 160, 316-24, 544. The court requested that DPD back up these determinations, and DPD provided ample evidence. CP 47-160. That evidence was never disputed. *See* CP 6.

guidelines are also cited in the Court Standards. See note 10, supra.

By ordering DPD to assign counsel to M.E. and other ITA respondents when the Department's attorneys were at capacity, the court usurped DPD's management and oversight functions. This action was beyond the court's authority.

2. <u>Washington's appellate courts have held that judges</u> <u>should not force public defense attorneys to work</u> <u>beyond their caseload limits</u>.

Two appellate decisions from this state demonstrate that the judiciary oversteps when it forces public defense attorneys to exceed their capacity. In *State v. Graham*, a public defense attorney moved for an extension of time to file the opening brief in an appeal from a first-degree murder conviction. 194 Wn.2d 965, 967 (2019). The attorney "explain[ed] that his current workload had prevented him from starting on [the] appeal, which had an extensive record, including 1,300 pages of transcripts." *Id*. The clerk of the Court of Appeals granted the extension but warned "that failure to file the brief by [the new deadline] would result in the imposition of a \$200 sanction." *Id*.

When the deadline arrived, the attorney "filed a second

request for an extension of time." Id. In support of this request,

the attorney asserted, among other things,

that he had worked on the brief as quickly as he could within his constitutional obligations and the Standards for Indigent Defense. He noted that the standards restricted the number of briefs he could write to three a month when the average transcript length is 350 pages, and he believed it would be impossible to comply with these standards and file [the opening] brief within the 63 days he had had since his office received the complete set of transcripts.

Id. at 967-68.

The clerk of the Court of Appeals granted the second extension but also sanctioned the attorney \$200 for not filing the opening brief by the initial extension deadline. *Id*. at 968. The attorney moved to modify the sanction ruling, but the motion was denied. *Id*.

This Court reversed, holding that the Court of Appeals "abused its discretion by sanctioning [the attorney] when he

requested an extension of time in order to fulfill his duty of effective representation." *Id.* at 970-71.¹² In reaching its decision, the Court noted that "[r]ecent cases have highlighted the constitutional importance of maintaining proper caseloads in indigent defense cases." *Id.* at 970 (citing cases). The Court also found that the attorney "was prompt in communicating the constraints placed on him by his current caseload and explaining why another extension was necessary." *Id.* Finally, the record showed no "malfeasance or lack of diligence" on the attorney's part; rather, it "reveal[ed] [his] primary concern with fulfilling his duty of effective representation." *Id.*

The Court concluded that under these circumstances, the imposition of a sanction "was contrary to the policies promoting

¹² Unlike here, where the superior court has no authority to override the management decision of DPD, the Court of Appeals is authorized to sanction counsel for late filings. *See* RAP 10.2(i); RAP 18.9(a). Accordingly, the appropriate standard of review in *Graham* was abuse of discretion.

effective representation of indigent criminal defendants on appeal." *Id.* Indeed, had the sanction been allowed to stand, the attorney would have been placed in the unfair position of either violating the caseload standards that applied to him or being punished for complying with those standards. The lower court erred by forcing this dilemma on the public defender. *See id.*

A similar situation was presented in *City of Mount Vernon v. Weston,* 68 Wn. App. 411 (1992). There three public defenders had represented indigent defendants at trial and during RALJ appeals but moved to withdraw after the defendants filed notices for discretionary review to the Court of Appeals. *Weston*, 68 Wn. App. at 413-14. The basis given was that the attorneys "did not have the time, expertise, and resources to provide representation past the RALJ stage." *Id.* at 414. The superior court denied the motions on the ground "that the local public defender[s] would be able to undertake further appellate

representation at some overall savings to the taxpayers of this state." *Id*.

The Court of Appeals reversed, finding the lower court had abused its discretion because "the undisputed evidence in the record fails to support the . . . stated reasons for denying the motion[s] to withdraw." *Id*.¹³ In particular, "the public defenders here were operating with caseload levels in excess of those endorsed by the ABA, by the Washington State Bar Association, and by the Skagit County Code." *Id*. at 415. As such, "the [s]uperior [c]ourt's assumption that the public defenders had the time to undertake further representation" was an "untenable" basis for denying withdrawal. *Id*. at 416.

¹³ Again, unlike here, the superior court was authorized by an appellate rule to "determine questions relating to the appointment and withdrawal of counsel for an indigent party on review." *Weston*, 68 Wn. App. at 414 (citation omitted). Thus, the standard of review was abuse of discretion. *See id*.

As these cases demonstrate, the purpose of setting a *maximum* caseload is to ensure that the public defender is able "to give each client the time and effort necessary to ensure effective representation." *WSBA Standards*, Standard 3.B. Once a public defender has reached the maximum, a court should no longer assign cases to the attorney until she once again has capacity.

3. <u>The highest courts in other states have held that</u> judges lack authority to require public defense providers to take cases beyond their capacity.

Three state supreme courts have addressed the situation presented in this case, and their decisions are instructive. In *Carrasquillo v. Hampden Cnty. Dist. Courts*, the Massachusetts Supreme Judicial Court took review of a lower court order that required the Springfield public defender division (PDD) of the Committee for Public Counsel Services (CPCS) "to provide counsel to Courtroom I in the Springfield District Court every day who shall accept appointments in all cases as ordered by the Court" 142 N.E.3d 28, 34 (Mass. 2020). Before the lower court issued this order, "the attorney in charge of the Springfield office and CPCS's deputy chief counsel determined . . . that the staff attorneys in the Springfield PDD office had exceeded their caseload capacity" and thus "could not provide effective assistance to any additional clients." *Id.* at 35. "Accordingly . . . the attorney in charge informed the First Justice of the Springfield District Court that CPCS staff attorneys in the Springfield office could not handle any more duty days in that court." *Id.*

The Massachusetts Supreme Judicial Court held that by ordering the attorneys to continue taking cases, the lower court "overstepped the bounds of [its] inherent powers":

> The June 12 order and subsequent appointments of CPCS staff attorneys improperly infringed upon CPCS's statutory authority to control assignments and to limit caseloads for its staff attorneys . . . because the order and the appointments overrode CPCS's determination that the staff attorneys in its

Springfield office had already reached their caseload capacity and could not accept any more cases, without any contrary findings by the [c]ourt that put in doubt the validity of that determination.

Id. at 35, 46.

Like DPD, CPCS "is responsible for planning, overseeing, and coordinating the delivery of criminal and certain noncriminal legal services . . . on behalf of indigent criminal defendants and other litigants who are entitled to counsel," including respondents in "mental health proceedings." *Id*. at 38. The statute that charges CPCS with these duties "requires CPCS to establish standards for these legal services, including caseload limitations, and to monitor compliance with these standards." *Id*. CPCS must "monitor and evaluate compliance with the standards . . . to [e]nsure competent representation of defendants." *Id*. at 46 (internal marks and citation omitted).

Because "CPCS has experience and expertise in managing the caseloads of its attorneys," the Supreme Judicial Court held

that CPCS's "determinations whether individual staff attorneys have exceeded those limitations are entitled to appropriate deference when supported by substantial evidence." *Id.* at 47 (punctuation altered). "The First Justice did not make any findings that put in doubt the validity of that determination." *Id.* Thus, by ordering the Springfield PDD to accept cases beyond the capacity of its attorneys, the lower court "impermissibly overrode . . . CPCS's statutory authority and obligation to control caseloads for its staff attorneys." *Id.*

A similar conclusion was reached in the case of *Lozano v*. *Circuit Court of Sixth Judicial Dist.*, 460 P.3d 721 (Wyo. 2020). There the state public defender had "notified the Circuit Court of the Sixth Judicial District that until further notice, the public defender was not available to take appointments to represent misdemeanor defendants due to an excessive caseload and shortage of attorneys in its Campbell County office." *Lozano*, 460 P.3d at 724. "[T]he circuit court entered orders appointing [the

public defender], or her representative, to represent misdemeanor defendants in two cases. When the local public defender's office declined the appointments, the court held [the public defender] in contempt." *Id*.

The "dispositive issue" on appeal was whether "the circuit court err[ed] in ruling that the public defender must accept all appointments to serve as counsel for indigent defendants unless and until the appointing court rules otherwise." Id. The trial court had based its decision on language in Wyoming's Public Defender Act providing that "[t]he public defender shall represent as counsel any needy person," which the trial court interpreted as "requir[ing] the public defender to accept all court appointments." Id. at 728 (quoting Wyo. Stat. Ann. § 7-6-104(a)). The Supreme Court of Wyoming found this interpretation "flawed," concluding that the section in question merely "describes an indigent defendant's right to representation." Id. at 729. This right, the Court added, "does not establish a [trial]

court's appointment authority or mandate that the public defender accept all appointments." *Id*. at 730.

As for the public defender's availability, the Supreme Court concluded that "[t]he public defender is in the best position to know its resources, including its attorneys, the skills and experience of its attorneys, and the weight and complexity of each office's caseload." Id. at 734. Furthermore, "the public defender's policies on caseloads and excessive caseloads" were "a reasoned implementation of the principles that have been carefully developed by the ABA on a national level." Id. at 725-26 (citation omitted). Under these circumstances, "the circuit court's order mandating that the public defender accept the two misdemeanor appointments was not lawful because it disregarded the public defender's determination that no public defender was available." Id. at 738.

Finally, in *State ex rel. Missouri Pub. Defender Comm'n v. Waters*, a public defender's office "decline[d] additional

appointments" after certifying it had "exceed[ed] its caseload capacity" and thus had "limited availability." 370 S.W.3d 592, 597, 601 (Mo. 2012). The trial court "held an evidentiary hearing at which the public defender presented evidence it had exceeded its caseload capacity," and this evidence was unquestioned. *Id.* at 601. The trial court nevertheless ordered the office to represent an indigent defendant, concluding that it "'had no choice' . . . because to do otherwise would have violated the defendant's Sixth Amendment right to counsel, as the court could identify no other realistic mechanism by which to provide other counsel." *Id.* at 597, 601.

On review, the Supreme Court of Missouri held that "the trial court exceeded its authority by appointing the public defender's office to represent a defendant in contravention of [caseload limits]." *Id.* at 612. The Court reasoned that caseload limits ensure "each district office can be assigned without compromising effective representation," thus "protect[ing] the

constitutional and statutory rights of the accused." Id. at 599. The Court also held that the trial judge "erred" in concluding that there were "no realistic alternative mechanisms for handling the issue of excessive appointments." Id. at 598. The Court noted that trial courts can, among other things, "'triage' cases on their dockets so that those alleging the most serious offenses, those in which defendants are unable to seek or obtain bail, and those that for other reasons need to be given priority" are assigned first, "even if it means that other categories of cases are continued or delayed" Id. at 598. Ultimately, the Supreme Court added, "it is incumbent on judges, prosecutors and public defenders to work cooperatively to develop solutions" to avoid a public defender having limited availability because of excessive caseloads. Id. at 612.

As these authorities demonstrate, public defense providers are empowered to stop accepting assignments once their attorneys are at or above capacity, and it is beyond the authority

of trial courts to require the providers to take more cases under those circumstances.

C. The superior court violated GR 42 by overriding DPD's public defense management and oversight decisions.

On January 1, 2023, this Court enacted General Rule 42, which applies to superior courts and courts of limited jurisdiction. GR 42(b). The purpose of GR 42 "is to safeguard the independence of public defense services from judicial influence or control." GR 42(a); *see also* 2 Elizabeth A. Turner, *Wash. Prac., Rules Practice GR 42* (9th ed. June 2024 Update) (GR 42 "is intended to bring Washington State into alignment with the ABA Ten Principles of a Public Defense Delivery System") (quoting drafters' comment).

Under GR 42, "[j]udges and judicial staff . . . shall neither manage nor oversee public defense services" GR 42(d)(1). This includes a prohibition on judges managing or overseeing a public defense agency's "attorney caseload limits" and "compliance with contracts, policies, procedures and standards."

GR 42(d)(2).

Regarding the assignment of public defense attorneys in

individual cases, "the role of judges and their staff" is limited to

(a) determin[ing] whether a party is eligible for appointment of counsel by making a finding of indigency or other finding that a party is entitled to counsel; or (b) refer[ring] the party for an indigency determination; and (c) refer[ring] the party to a public defense agency or a public defense administrator to designate a qualified attorney.

GR 42(e)(1). If no qualified attorney is available, a judge "shall

appoint an attorney who meets the qualifications in the Supreme

Court Standards for Indigent Defense." GR 42(e)(3).

As explained in detail above, DPD is responsible for

"[p]roviding legal defense services in an efficient manner" that

not only "ensures effective representation" of clients but also

ensures compliance with the WSBA Standards and with the labor

agreement that governs DPD's employment of line attorneys.

King Cnty. Code § 2.60.020(B)(2); *see also* King Cnty. Code § 2.60.026(A)(5); CP 53-59, 95-134. To achieve these objectives, DPD must closely monitor its attorneys and take the steps necessary to control their caseloads. *See* CP 63-69. This includes declining additional case assignments when attorneys are at capacity. *See WSBA Standards*, Standard 3.B; MPR 2.1 Standards, Standard 3.2; *ABA Ten Principles*, Principle 3.

By ordering DPD to assign an attorney to represent M.E., the superior court usurped DPD's management and oversight functions. *See* CP 4-9. Though it acknowledged that DPD is "solely" responsible for managing and allocating attorney resources and determining case assignments, the court substituted its own conclusions in place of DPD's reasoned judgments regarding compliance with contracts, policies, and standards. *See, e.g.*, CP 7. In doing so, the court invalidated DPD's independence in violation of GR 42.

D. Requiring public defenders to exceed caseload limits raises significant ethical and constitutional concerns.

"The right to effective counsel . . . [is] fundamental to, and implicit in, any meaningful modern concept of ordered liberty." State v. A.N.J., 168 Wn.2d 91, 96 (2010); see also Matter of Garcia-Mendoza, 196 Wn.2d 836, 840 (2021) ("The right to effective assistance of counsel is a foundational part of the compact between each of us and our state."). "Compliance with the rules of professional conduct is a basic component of effective assistance." Office of Pub. Advocacy v. Superior Court, First Judicial Dist., ____ P.3d ____, 2025 WL 498790, at *10 (Alaska Feb. 14, 2025) (unpublished); see also WSBA Standards, Standard 2 ("Representation shall be prompt and delivered in a professional, skilled manner consistent with minimum standards set forth by . . . the Washington Rules of Professional Conduct.").

Several authorities have recognized that various "ethical and constitutional pitfalls" arise when public defense attorneys are ordered to take assignments beyond their maximum caseloads. *Carrasquillo*, 142 N.E.3d at 48; *see also*, *e.g.*, *Lozano*, 460 P.3d at 724; *Waters*, 370 S.W.3d at 605-09; ABA Standing Comm. on Ethics & Prof'l Responsibility, Formal Op. 06-441 (2006); Wash. State Bar Ass'n Advisory Op. 1336 (1990). Indeed, it has been said that "public defenders are risking their own professional lives when appointed to an excessive number of cases." *Waters*, 370 S.W.3d at 608 (citation omitted). It has also been said that "a systemic deprivation of the right to [effective] assistance of counsel" is "the natural, foreseeable, and expected result" of excessive caseloads. *Wilbur v. City of Mount Vernon*, 989 F. Supp. 2d 1122, 1124, 1133 (W.D. Wash. 2013).

> 1. <u>The impact of excessive caseloads on professional</u> <u>conduct obligations</u>.

Excessive caseloads risk impeding the ability of public defense attorneys to satisfy at least three of their obligations under the Rules of Professional Conduct. First, a lawyer "shall provide competent representation to a client," which requires the "thoroughness and preparation reasonably necessary for the representation." RPC 1.1. Second, "[a] lawyer shall act with reasonable diligence and promptness in representing a client." RPC 1.3. And third, a lawyer "shall not represent a client if the representation involves a concurrent conflict of interest." RPC 1.7(a). A concurrent conflict of interest exists if "there is a significant risk that the representation of one or more clients will be materially limited by the lawyer's responsibilities to another client" RPC 1.7(a)(2).

"[A] lawyer with an excessive workload cannot provide competent, diligent or conflict free representation." *Lozano*, 460 P.3d at 724. Thus, when a court orders a public defense attorney to take appointments beyond the maximum allowed, the court "risks interfering with [the attorney's] ethical obligations . . . to act with reasonable diligence and promptness in representing [her] clients" *Carrasquillo*, 142 N.E.3d at 35-36. "In addition,

having too many clients and matters at once may create concurrent conflicts of interest . . . if attorneys are then forced to pick and choose between clients who will receive their limited time and attention and others who will necessarily be neglected." Id. at 49; see also Office of Pub. Advocacy, 2025 WL 498790, at *12 ("When an attorney is assigned too many cases, the risk increases that the attorney's ability to represent any one client may be limited by responsibilities to others"); Waters, 370 S.W.3d at 608 ("a conflict of interest is inevitably created when a public defender is compelled by his or her excessive caseload to choose between the rights of the various indigent defendants he or she is representing") (quoting In re Edward S., 92 Cal. Rptr. 3d 725, 746-47 (2009)).

Excessive caseloads also present issues for the lawyers who manage public defense attorneys. *See* ABA Standing Comm. on Ethics & Prof'l Responsibility, Formal Op. 06-441 (2006). "A lawyer shall be responsible for another lawyer's violation of the

Rules of Professional Conduct if . . . the lawyer orders or, with knowledge of the specific conduct, ratifies the conduct involved." RPC 5.1(c)(1). A lawyer with "managerial authority" or "direct supervisory authority over the other lawyer" is also responsible if he "knows of the conduct at a time when its consequences can be avoided or mitigated but fails to take reasonable remedial action." RPC 5.1(c)(2). Accordingly, "supervisors must, working with the lawyers they supervise, monitor the workload of the subordinate lawyers to ensure that the workloads are not allowed to exceed that which may be handled by the individual lawyers." ABA Formal Op. 06-441; *see also* Wash. State Bar Ass'n Advisory Op. 1336 (1990) (same).

At the end of the day, "[a] lawyer can be smart, dedicated, and experienced, but too much work will prevent even the best lawyer from providing clients with ethical effective assistance of counsel." Peter A. Joy, *Ensuring the Ethical Representation of* Clients in the Face of Excessive Caseloads, 75 Mo. L. Rev. 771, 778 (2010).

2. <u>The impact of excessive caseloads on the right to</u> <u>effective assistance of counsel</u>.

Because ethical representation is a fundamental component of effective representation, any order that requires a public defense attorney to exceed applicable caseload limits also "threatens to undermine the very right to counsel that the order seeks to protect." Carrasquillo, 142 N.E.3d at 35-36; see also *Lozano*, 460 P.3d at 724 ("if the public defender offices have workloads that exceed 100%, the right to counsel is jeopardized"). "A situation in which an attorney is overloaded with cases compromises the attorney's ability to comply with relevant rules of professional conduct and," consequently, "may deny a defendant effective assistance of counsel." Office of Pub. Advocacy, 2025 WL 498790, at *12. "Ineffective representation can result in a wrongful conviction or juvenile court adjudication, inappropriate civil commitment, or unlawful termination of parental rights." WSBA Standards, Introduction.

Of "the major factors contributing to poor quality of defense services . . . the problem of excessive caseloads is the most pernicious." Joy, Ensuring the Ethical Representation of *Clients, supra*, at 778. "Each and every corner cut leads to substandard assistance of counsel even if it does not rise to the level of prejudice required to demonstrate ineffective assistance of counsel." Id. at 779; see also Carrasquillo, 142 N.E.2d at 49 ("Ordering assignment of additional cases to public defenders who are already carrying maximum caseloads risks making them ineffective, by hindering them from" accomplishing various responsibilities, "thereby defeating the purpose of the right to counsel."). The Court knows this all too well, having adopted "caseload limitations on public defenders" in "the wake of the Grant County Case, A.N.J., and other similar cases." Davison, 196 Wn.2d at 305 (Gonzalez, J., concurring).

As the WSBA Board of Governors stated in 2022, courts "should provide relief when excessive caseloads threaten to lead to representation lacking in quality or to the breach of professional obligations. To do otherwise, not only harms individual defendants but our entire justice system." Wash. State Bar Ass'n Board of Governors, Statement: Public Defense Lawyers Should Seek Relief from Excessive Workloads 3 (July 21, 2022) (emphasis in original; citation omitted). Stated more directly, "it is just plain wrong" for a court "to force lawyers to ration their services to clients in drastic ways just so it can be said that a warm body possessing a law license 'represented' the accused." Norman Lefstein, Executive Summary and Recommendations— Securing Reasonable Caseloads: Ethics and Law in Public Defense 5 (Am. Bar Ass'n 2012); see also A.N.J., 168 Wn.2d at 121 (Sanders, J., concurring) (There "is no reason for [a] court to facilitate [potential] constitutional violation[s] by appointing lawyers" who are "out of compliance" with relevant standards

for indigent defense.). "In effect, such a solution improperly shifts 'the burden of systemic lapse' in [a] public defender system to the very defendants the system was intended to protect" *Carrasquillo*, 142 N.E.3d at 49.

Compliance with caseload standards protects not only those who face the loss of liberty or other protected rights but also "the public, victims, state and other jurisdictions, as well as public defense attorneys." *WSBA Standards*, Introduction.

E. The superior court provided insufficient grounds for ordering DPD to appoint counsel to represent M.E.

In ordering DPD to appoint counsel to represent M.E., the superior court provided three categories of justification. All are without merit.

First, the court grounded its decision in the right of "respondents to [have] access to counsel" and DPD's corresponding obligation to provide such counsel. CP 6. The court stated that it had weighed "the needs of how DPD manages its caseloads against the [assistance of counsel] rights of those involuntarily detained pursuant to RCW 71.05 and/or RCW 71.34," and the right of respondents to counsel prevailed. CP 7.

This conclusion is flawed because "the duty to represent indigent defendants can and must be balanced with the obligation of an attorney to provide *competent and effective* assistance in order to meet an attorney's ethical and constitutional obligations." Waters, 370 S.W.3d at 605 (emphasis in original); see also Lozano, 460 P.3d 732 (rejecting trial court's conclusion that "statutory obligations" of public defense attorneys to represent indigent individuals "take precedence over the rules of conduct and [that] the rules must yield"). Indeed, "[i]t was with these rights and obligations of [indigent individuals] and of counsel in mind that the" caseload limits were established. Waters, 370 S.W.3d at 608; see also WSBA Standards, Introduction; MPR 2.1 Standards, Preamble. Ultimately, neither the right to counsel nor the obligation to

provide counsel will be satisfied if the appointed attorney is working beyond the maximum caseload. *See* Section IV.E, *supra*.

The second justification offered by the superior court was its "inherent power to preserve the administration of justice," which the court supported with a citation to *Matter of Salary of Juvenile Dir.*, 87 Wn.2d 232 (1976). CP 6-7. But that case involved judicial authority to ensure sufficient funding for court functions. *Juvenile Dir.*, 87 Wn.2d at 242. Moreover, this Court held that the lower court's actions there amounted to "an improper check on the function of the legislative branch of government." *Id.* at 252. As explained above, the superior court here likewise exceeded its authority by usurping DPD's management and oversight of public defense services in King County. *See* Sections IV.C-D, *supra*.

The final justification offered by the superior court was the assertion that it "is not intervening in [DPD's] management decisions for individual attorneys," as "[w]ho [the ultimate attorney for M.E.] is and where they come from and what

caseloads they maintain is a decision for . . . DPD." CP 6-7. A

similar argument was made in Carrasquillo, but the

Massachusetts Supreme Judicial Court rejected it:

[The court's] order had the effect of overriding [the agency's] authority to control case assignments by requiring Springfield PDD staff attorneys to appear and accept additional appointments... even though [the agency] had already determined that they should not do so due to their existing caseloads, and even though the court had not made any findings showing that [the agency's] decision was erroneous.

142 N.E.3d at 47-48.

The same is true here. DPD made clear to the court that due to excessive caseloads, there were no attorneys available either internally or externally—to represent M.E. *See* CP 5-6, 317, 319-20. Thus, regardless of the court's "don't ask, don't tell" approach, it was obvious that DPD could only comply by appointing an attorney the Department had already determined was unable to take additional cases. This was beyond the court's authority. *See* Sections IV.C-D, *supra*.

V. CONCLUSION

As a former state supreme court justice recently noted, "the literature abounds with sorrowful declarations of the failure of the promise of *Gideon*."¹⁴ Indeed, though it has been more than six decades since the United States Supreme Court issued that landmark decision, our system of justice continues to struggle to ensure that the right to *effective* counsel is fact, not myth; substance, not illusion.¹⁵ Great strides have been made, to be sure. But as we continue to build toward that goal, we must keep our cornerstones secure.

Caseload limits and independence from judicial influence and control are fundamental components of a public defense

¹⁴ Brent R. Appel, *State and Federal Constitutional Right to Counsel in an Age of Case Specific and Systemic Inadequacies*, 93 UKMC L. Rev. 523, 523 (2025).

¹⁵ See A.N.J., 168 Wn.2d at 98 ("troublesome limits on indigent counsel have made the promise of effective assistance of counsel more myth than fact, more illusion than substance").

system that provides effective assistance of counsel to its clients. By ordering DPD to continue assigning cases when its attorneys were indisputably at capacity, the superior court interfered with DPD's independent power to manage and oversee public defense services and overrode the Department's caseload decisions. In doing so, the court exceeded its authority and violated GR 42.

This Court should make clear to the lower courts of Washington that they cannot interfere with the reasoned and supported caseload management decisions of public defense attorneys. That includes the decision to decline additional case assignments until there is capacity under applicable standards.

VI. APPENDIX

 A. Office of Pub. Advocacy v. Superior Court, First Judicial Dist., P.3d , 2025 WL 498790 (Alaska Feb. 14, 2025) (unpublished)

RAP 18.17(b) CERTIFICATION

Petitioner's counsel certifies that this brief contains 10,823

words in compliance with RAP 18.17(b) and RAP 18.17(c)(11).

RESPECTFULLY SUBMITTED AND DATED this 26th day of

March, 2025.

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CERTIFICATE OF SERVICE

I certify that on March 26, 2025, I caused a true and

correct copies of the foregoing to be served on the following via

the Court of Appeals Electronic Filing Notification System:

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I certify under penalty of perjury under the laws of the

State of Washington that the foregoing is true and correct.

DATED this 26th day of March, 2025.

By: <u>/s/ Toby J. Marshall, WSBA #32726</u> Toby J. Marshall, WSBA #32726

Appendix A

2025 WL 498790 Only the Westlaw citation is currently available.

NOTICE: THIS DECISION DOES NOT SERVE AS PRECEDENT. THE CASE WAS ENTERED IN THE WESTLAW DATABASE BEFORE THE TIME FOR REHEARING HAD EXPIRED. IT IS POSSIBLE THAT REHEARING HAS BEEN SOUGHT, GRANTED OR DENIED.

Supreme Court of Alaska.

OFFICE OF PUBLIC ADVOCACY, Applicant,

v. SUPERIOR COURT, FIRST JUDICIAL DISTRICT, Respondent.

> Supreme Court No. S-18741 | February 14, 2025

Synopsis

Background: The Office of Public Advocacy (OPA) was appointed to represent a criminal defendant after the Public Defender Agency withdrew from the case based on a shortage of available attorneys. The Superior Court, First Judicial District, Ketchikan, Daniel Doty, J., denied OPA's motion to withdraw. OPA filed an original application for relief with the Court of Appeals challenging its appointment, and the Supreme Court accepted the Court of Appeals' certification to transfer jurisdiction.

Holdings: The Supreme Court, Carney, J., held that:

[1] trial court did not violate the separation of powers doctrine by appointing OPA to represent defendant;

[2] evidence supported trial court's conclusion that appointment of OPA to represent defendant was necessary to protect her right to effective assistance; and

[3] OPA was statutorily required to provide legal representation to defendant who could not be represented by Public Defender Agency due to a conflict of interest caused by Agency's lack of capacity to provide effective representation.

Affirmed.

Procedural Posture(s): Original Jurisdiction; Motion to Withdraw as Counsel.

West Headnotes (26)

[1] Criminal Law - Statutory issues in general Criminal Law - Constitutional issues in general

Questions of statutory interpretation and constitutional issues are questions of law to which the Supreme Court applies its independent judgment.

[2] Criminal Law 🤛 Review De Novo

Whether a conflict of interest exists under the Rules of Professional Conduct is an issue of law reviewed de novo under the independent judgment standard.

[3] Criminal Law 🤛 Scope of Inquiry

In exercising its independent judgment, the Supreme Court will adopt the rule of law that is most persuasive in light of precedent, reason, and policy.

[4] Constitutional Law - Nature and scope in general
 Constitutional Law - Nature and scope in

general

Constitutional Law \leftarrow Nature and scope in general

The Alaska Constitution vests legislative power in the legislature; executive power in the governor; and judicial power in the courts.

[5] Constitutional Law 🖙 Encroachment in general

The separation of powers doctrine limits the authority of each branch to interfere in the powers that have been delegated to the other branches.

[6] Constitutional Law - Purposes of separation of powers

The separation of powers and its complementary doctrine of checks and balances are part of the constitutional framework of Alaska; it not only protects each branch's functional existence, it also precludes the exercise of arbitrary power and safeguards the independence of each branch of government.

[7] Constitutional Law 🖙 Encroachment on Executive

Under the separation of powers doctrine, when an act is committed to executive discretion, the exercise of that discretion within constitutional bounds is not subject to the control or review of the courts.

[8] Criminal Law 🤛 Public Defenders

A court may not interfere with the management of public defender services unless presented with a case that demonstrates that the public defender agency's operations violate the constitution, either because of unlawful managerial decisions or a lack of resources necessary for providing the effective representation required under the constitution and statutes.

[9] Criminal Law - Deprivation or Allowance of Counsel

Trial courts play an important role in safeguarding the constitutional right of effective assistance of counsel. U.S. Const. Amend. 6.

[10] Criminal Law - Role and Obligations of Judge

Criminal Law \leftarrow Duty of court to inquire as to effectiveness in general

Courts have an obligation to ensure the integrity of the justice system and to ensure

that defendants receive constitutionally effective assistance of counsel. U.S. Const. Amend. 6.

[11] Criminal Law - Deficient representation in general

Compliance with the rules of professional conduct is a basic component of the effective assistance of counsel. U.S. Const. Amend. 6.

[12] Criminal Law - Advice, inquiry, and determination

Courts must inquire when an apparent conflict of interest exists to ensure that the defendant receives conflict-free representation. U.S. Const. Amend. 6.

[13] Criminal Law 🤛 Objections and waiver

To ensure conflict-free representation, courts may disqualify an attorney or condition continued representation upon the defendant's waiver of a conflict that is waivable under the ethics rules. U.S. Const. Amend. 6.

Trial court did not violate the separation of powers doctrine by ordering the Public Defender Agency to withdraw from representing defendant and to appoint the Office of Public Advocacy (OPA) to represent her; having determined that the Agency was failing to provide representation consistent with its ethical and constitutional obligations, the court had a duty to ensure defendant's rights were protected and that she received effective assistance of counsel. U.S. Const. Amend. 6.

[15] Criminal Law Deficient representation in general

Effective representation requires more than simply showing up for hearings. U.S. Const. Amend. 6.

[16] Criminal Law 🤛 Public Defenders

Evidence supported trial court's conclusion that appointment of Office of Public Advocacy (OPA) to represent defendant was necessary to protect her right to effective assistance of counsel; the attorney assigned to defendant by the Public Defender Agency had resigned and not yet been replaced, defendant's former attorney had not actively worked her case for at least two months before her resignation, and the Agency could not assign an attorney to actively work on her case for another three months, a delay that was excessive since defendant had been charged three years prior and sought to vindicate her right to a speedy trial. U.S. Const. Amend. 6.

[17] Criminal Law - Appointment; waiver; appearance pro se

Trial court's requirement that defendants to waive their right to the effective assistance of counsel if they wished to remain represented by the Public Defender Agency after the attorney assigned to represent them had resigned, rather than waiving their right to a speedy trial, was not reversible error; trial court determined that the affected clients would not have meaningful representation for nearly five months and that the delay would conflict with their speedy trial rights under the state and federal constitutions, and delay thus required defendant to waive their speedy trial rights if they wanted to remain with the Agency. U.S. Const. Amend. 6; Alaska Const. art. 1, § 11; Alaska R. Crim. P. 45(b).

[18] Criminal Law Duty of court to inquire as to effectiveness in general

When it is apparent to the court that a defendant is not receiving effective representation, the court has an affirmative duty to intervene. U.S. Const. Amend. 6.

[19] Criminal Law 🤛 Particular cases in general

A situation in which an attorney is overloaded with cases compromises the attorney's ability to comply with relevant rules of professional conduct and may deny a defendant effective assistance of counsel. U.S. Const. Amend. 6; Alaska R. Prof. Conduct 1.1(a), 1.3, 3.2.

[20] Criminal Law - Partners and associates; public defenders

A public defender agency's inability to provide effective assistance because of a lack of attorneys or hours can amount to a conflict of interest. U.S. Const. Amend. 6; Alaska R. Prof. Conduct 1.7(a).

[21] Criminal Law - Partners and associates; public defenders

Criminal Law 🤛 Public Defenders

Office of Public Advocacy (OPA) failed to establish that the phrase "a conflict of interests" in statute requiring the OPA to provide legal representation to indigent persons who could not be represented by the Public Defender Agency did not include a conflict of interest due to a lack of capacity; plain language of statute did not distinguish between particular kinds of conflicts, and legislative deliberations and related testimony mainly discussed the fiscal benefits of creating an office to handle cases where the Agency had a conflict, not what constituted a conflict. Alaska St. § 44.21.410(a)(4).

[22] Criminal Law 🤛 Public Defenders

Office of Public Advocacy (OPA) was statutorily required to provide legal representation to defendant who could not be represented by Public Defender Agency due to its lack of capacity to provide effective representation; statute requiring the OPA to provide legal representation to indigent persons who could not be represented by the Agency due to a conflict of interest, including a conflict caused by lack of

capacity. Alaska St. § 44.21.410(a)(4).

[23] Statutes - Undefined terms Statutes - Dictionaries

In the absence of a statutory definition, the Supreme Court construes statutory terms according to their common meaning; dictionaries provide a useful starting point for this exercise.

[24] Statutes - Plain Language; Plain, Ordinary, or Common Meaning

The plainer the statutory language is, the more convincing the evidence of contrary legislative purpose or intent must be.

[25] Statutes 🤛 Burden of proof

If statutory language is clear and unambiguous, then the party asserting a different meaning bears a correspondingly heavy burden of demonstrating contrary legislative intent.

[26] Criminal Law Partners and associates; public defenders

Criminal Law 🤛 Public Defenders

A "conflict of interests" in statute requiring the Office of Public Advocacy (OPA) to provide legal representation to those who could not be represented by the Public Defender Agency means all conflicts of interests and does not exclude conflicts due to capacity. Alaska St. § 44.21.410(a)(4).

Certified Original Application for Relief and Jurisdiction Transfer from the Court of Appeals of the State of Alaska, on original application for relief from the Superior Court of the State of Alaska, First Judicial District, Ketchikan, Daniel Doty, Judge. Court of Appeals No. A-14132, Superior Court Nos. 1KE-20-00202 CR, 1KE-19-01040 CR, 1PW-20-00093 CR, 1PW-20-00134 CR, 1PW-20-00109 CR, 1PW-20-00118 CR, 1PW-20-00074 CR

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Before: Maassen, Chief Justice, Carney, Borghesan, and Henderson, Justices, and Winfree, Senior Justice.^{*} [Pate, Justice, not participating.]

<u>OPINION</u>

CARNEY, Justice.

I. INTRODUCTION

*1 After the unanticipated resignation of an assistant public defender, the Public Defender Agency proposed a plan to temporarily assign other attorneys to her cases until a permanent replacement was hired. The superior court rejected the Agency's plan because no specific attorney would be assigned to the cases or prepare them for trial. It ordered the Agency to advise affected clients that if they wished to remain represented by the Agency, they would have to waive their rights to effective assistance of counsel until an attorney was permanently assigned to their cases, and if they did not waive their rights, the Agency would withdraw.

The Agency was able to assign specific attorneys for all but one client's case. It withdrew from that case as ordered by the superior court. The court then appointed the Office of Public Advocacy (OPA) to represent that client. OPA moved to withdraw. It argued that its appointment to the case was not authorized under AS 44.21.410 because the Agency's lack of capacity to take on additional cases was not a conflict

of interest under that statute and that the superior court had exceeded its authority by rejecting the Agency's proposed plan to cover the affected cases. The superior court denied the motion to withdraw. OPA eventually filed an original application for relief with the court of appeals challenging its appointment. The court of appeals certified the original application to this court and asked us to accept transfer of jurisdiction, which we granted.

We issued an order continuing OPA's appointment, stating that a written opinion explaining the order would follow. We now explain that the superior court did not err by intervening in the affected cases; lack of capacity can amount to a conflict of interest; and when the Agency has a conflict due to its lack

of capacity to take cases, AS 44.21.410(a)(4) requires that OPA be assigned.

II. FACTS AND PROCEEDINGS

A. Background

1. Public Defender Agency

In 2021 the Agency assigned attorneys from its Juneau office to cases in other Southeast locations, including Ketchikan, Sitka, and Prince of Wales. In late 2022 it became apparent that one of the attorneys was struggling to manage her caseload.

In early November, less than an hour before the scheduled start of a felony sentencing hearing in Ketchikan, the attorney filed a request to continue the hearing. The attorney appeared at the hearing by telephone without her client. The court denied the continuance and ordered the attorney to appear in person the next day for the sentencing hearing. The hearing was held the following day.

A few days later the attorney was again scheduled to be in Ketchikan for a felony trial. Trial proceedings were set to begin at 8:30 a.m. Shortly before that time, the attorney emailed the court that her flight from Juneau was delayed; she subsequently emailed that it had been cancelled. The court rescheduled trial to begin the next day. It also indicated it would set a sanctions hearing to address the attorney's failure to appear and her failure to advise her client about her absence. The court noted that even if the scheduled flight had arrived on time, the attorney still would not have been able to be in court at 8:30.

*2 In addition, the attorney had a hearing scheduled before a different Ketchikan judge at the same time that the trial was

supposed to start. And the attorney had not advised either judge of the scheduling conflict.

The attorney appeared as ordered in Ketchikan the following day. After being admonished by the court, the attorney moved to continue the trial, arguing that the court had damaged her relationship with her client and was unfairly penalizing her for travel difficulties. The court denied the request for a continuance; trial commenced and the defendant was convicted.

The same attorney represented another client, Georgina Mathes, in an unclassified felony case; Mathes's codefendant was represented by an OPA contract attorney. ¹ Mathes had been charged in 2020. In October and again in early November 2022 the attorney advised the court that she was ready for trial. But due to the codefendant's attorney's schedule, trial was continued until December.

At a trial call on November 29, Mathes's attorney informed the court that she had been assigned to a murder case that was scheduled for a six-week trial beginning in March in Anchorage. She advised the court that she was therefore unable to do another trial until after the Anchorage trial concluded and asked that Mathes's case be continued until May or later.

The codefendant's attorney opposed any continuance but was willing to sever his case from Mathes's. The prosecution opposed both a continuance and severance, arguing that either option would be prejudicial to the State and to the victim. The court denied both the continuance and severance, finding that they were prejudicial to the State. It also concluded that the time between the end of Mathes's trial and the beginning of the Anchorage trial would provide Mathes's attorney sufficient time to prepare. The court scheduled trial for December 6.

Mathes's attorney then filed a new motion to continue, arguing that she would not be able to represent Mathes and her other clients effectively if she were required to try Mathes's case before the six-week Anchorage trial. In an affidavit she stated that her investigation for Mathes's trial was incomplete and that she had 95 cases, most of which were felonies, including 26 class A felonies, sex felonies, and unclassified felonies. The Deputy Public Defender also filed an affidavit confirming that the attorney's caseload was greater than appropriate, given the severity and number of cases, and that the Anchorage trial was her top priority. The court denied the continuance. At the beginning of the scheduled trial on December 6, the Deputy Public Defender sought a continuance because Mathes's attorney was unavailable due to a medical emergency. After the court granted the request, the Agency filed a motion to continue several of the attorney's cases before that court, including Mathes's. It asserted that the caseloads its attorneys, including Mathes's attorney, carried were far in excess of recommended maximums and that because of the stress caused by such caseloads, Mathes's attorney was unable to try any cases before the Anchorage homicide trial. The court scheduled an evidentiary hearing on the Agency's motion for early January.

***3** On December 26, the Agency notified the court that Mathes's attorney had decided to resign. It requested that the court therefore vacate the evidentiary hearing. The court denied the motion but consolidated the evidentiary hearing with the sanctions hearing it had scheduled in the earlier case.

2. Evidentiary hearing

The court held a hearing in early January focused on the Agency's plan to provide representation to clients affected by the attorney's resignation. The Deputy Public Defender stated that the Agency planned to contract homicide cases to outside counsel, reassign other serious felonies to assistant public defenders, and "float" the remaining cases — meaning that those cases would be assigned temporarily to attorneys to cover hearings until a replacement could be hired and assigned to the cases on a more permanent basis. The court recognized that a new Agency attorney was scheduled to start in Sitka in mid-March and that clients would not remain with their temporary attorney.

The court also questioned the accuracy of Mathes's attorney's assertions that she had an overwhelming caseload. It noted that the Deputy Public Defender had submitted a list of her cases to the court that reflected she had fewer cases than she had earlier reported to the court; and of those cases, fewer still were as serious or active as she had claimed. The court noted that the Deputy Public Defender had provided no specifics when initially asked to explain the discrepancy between the attorney's affidavit, which represented that she had 95 cases — a majority of which were reported to be felonies — and the number presented to the court, which was 73 cases — including 40 felonies — and had speculated

the affidavit included probate cases, might have counted the cases differently, or included cases that had been reassigned. When questioned, the Deputy Public Defender appeared to suggest that he relied on the attorney's sworn — but inaccurate — representations. The court found it "inexcusable" that Mathes's attorney misled the court "on a point so material to the issues in these cases."

In Mathes's case, the Deputy Public Defender requested a two-month continuance to determine who would represent Mathes; the codefendant agreed to a short continuance but opposed a lengthy one. The prosecution said it was "resigned to the need for a short continuance." The court continued the cases to February. The court also advised the parties that it still intended to address its duty to ensure all of the attorney's other clients received effective assistance of counsel.

3. The court's order

A few days later the court issued an "Order on Cost Bill & Sufficiency of Representation."² The court recognized that criminal defendants are entitled to effective assistance of counsel "at all critical stages of a criminal prosecution," citing *Perez v. State.*³ It observed that the Agency was required to provide competent representation to its clients. The court interpreted "competent" representation under the Rules of Professional Conduct and the state and federal constitutions to include a duty to "move a case reasonably quickly." The court concluded that the Agency was required to provide its clients "representation that is both prepared *and* prompt" (emphasis in original). It held that defendants are entitled to more than just "an attorney show[ing] up for hearings."

*4 The court then found that the Agency was failing to meet those duties. It found that Mathes's attorney "ha[d] not been meaningfully available to most or all of her clients since she moved to continue [Mathes's case] in late November." It also concluded that the Agency's proposed plan to provide representation until a new attorney arrived did not satisfy the professional conduct rules or *Perez*. It noted that a replacement attorney would not start until March and the Agency had limited capacity to reassign cases in the interim. It concluded that by March, the affected clients would have been inadequately represented for about four months.

Based on the Agency's lack of "capacity to provide trial-level representation" to many of the affected clients for so many months, the court found that the Agency had a conflict of

interest under Rule of Professional Conduct 1.7(a)(2) because of the "significant risk that representation of one or more clients will be limited by the lawyer's responsibilities to another client."⁴ It found that the Agency as a whole had a conflict of interest because the current Agency attorneys who would be assigned the affected cases would be forced to choose between providing representation to their current clients and the reassigned clients.

The court recognized that the conflict "presents an odd wrinkle" because it would last only until the new attorney was able to provide meaningful representation. It also acknowledged the Deputy Public Defender's concerns that if the Agency withdrew from the affected cases, those clients would simply sit unrepresented on a waiting list until the Agency itself could resume taking cases. But the court concluded that would not be the case because OPA exists in part to step in where the Agency is unable to represent a client.

The court explained that OPA's authorizing statute, AS 44.21.410(a)(4), requires it to represent "indigent persons who are entitled to representation [under the Agency's authorizing statute] and who cannot be represented by the [Agency] because of a conflict of interests." It highlighted that the statute "does not inquire about the nature of a conflict, or whether the conflict is temporary." The court therefore concluded that as long as a conflict of interest existed at the time of withdrawal, OPA was authorized to provide representation.

Recognizing that withdrawal and reassignment to another agency was a drastic step, and that OPA might also "be overburdened, or might have its own case-specific conflicts," the court ordered the Agency to meet with the clients affected by the attorney's resignation; advise them of the Agency's plans for their continued representation; and, if the Agency would not be assigning permanent attorneys, advise them that, if they wished, it would withdraw from representation so that the affected cases could be transferred to OPA.⁵ The court further directed that, if the client preferred to remain with the Agency, the client would have to waive any claim of ineffective assistance of counsel until a permanent attorney was assigned.

The court also ordered that, after meeting with each of the affected clients, the Agency was, in each case, to have an attorney file an entry of appearance, a motion to withdraw, or a notice that the client requested to remain with the Agency.

And in those cases in which clients requested to remain with the Agency, the court ordered that a representation hearing be held to ensure the clients had been fully advised and had knowingly, intelligently, and voluntarily "waive[d] their right to the effective assistance of counsel until a permanent attorney can be assigned to the case."

4. Further proceedings

*5 The prosecution moved for partial reconsideration of the court's order. While it agreed that judicial intervention was warranted because the Agency had an irreparable conflict "imped[ing] its ability to effectively represent the named defendants," the prosecution argued that requiring waiver of the right to effective assistance of counsel was "constitutionally unworkable" and violated the ethical rules governing prosecutors and defense attorneys. The prosecution requested that the court appoint counsel through OPA or Alaska Administrative Rule 12(e) instead.⁶

The Agency also responded to the court's order. After stating its general intent to comply with the court's order and outlining the specific steps it intended to take, it disputed the court's conclusion that its previously proposed plan constituted ineffective assistance of counsel. The Agency argued that its proposed plan to provide representation was constitutionally sufficient because each client would be assigned to a current Agency attorney and given the lawyer's name and contact information, and that lawyer would "address issues that concern the client until the case is reassigned to the new lawyer," including bail, negotiations, discovery, and hearing preparation and appearances. The Agency asserted that its coverage plan therefore did not "present[] the same concerns highlighted by the Alaska Court of Appeals in *Perez.*"⁷

The superior court denied the prosecution's motion for reconsideration. The court stated that the Agency "ha[d] sorted things out" by providing permanent attorneys for most of the affected clients and by withdrawing from two others, in which the court had appointed OPA. The court acknowledged the prosecution's concern that its order was not constitutionally permissible but concluded that the concern was "academic" because the public defender covering the remaining cases advised the court that he "plan[ned] to work the cases, investigate what needs investigating, file motions if they need to be filed, hire experts if they need to be hired, [and] negotiate if it is fruitful to negotiate." The court

observed that, "[i]n the end, [that] is all anyone can really ask for."

B. Office Of Public Advocacy Appointment

On January 23, 2023, the Agency moved to withdraw from Mathes's case, consistent with her request and the court's order. The court granted the motion and appointed OPA to represent Mathes on January 24.

On February 8, OPA filed a motion to vacate its appointment. First, it argued that the Agency did not have a conflict of interest as a matter of fact or as a matter of law. OPA argued that the court's prior order denying the prosecution's motion for reconsideration showed that the Agency did not have a conflict of interest because the court had concluded that the Agency's coverage plan satisfied its effective representation concerns. OPA also cited the "additional information" supplied by the Agency during those hearings as establishing that the Agency had capacity to represent Mathes. OPA also argued that the court had incorrectly interpreted "[f]ailure to meet the [c]ourt's desired trial schedule" as a conflict, and that even if it were a conflict, it would not create an Agencywide conflict of interest. But if it did create an Agency-wide conflict, OPA argued, then OPA had the same conflict - if not worse, because it had fewer staff attorneys than the Agency.

*6 OPA disagreed with the court's reliance on *Perez* v. *State*⁸ and *Donnelly v. State.*⁹ *Perez*, OPA argued, recognized that the Agency is responsible for analyzing conflicts of interest but did not suggest that a delay in assigning a permanent attorney violates the right to effective counsel. And *Donnelly*, it asserted, was inapposite because the court in that case denied the Agency's motion to withdraw and did not appoint OPA. Instead, OPA argued, the court should have looked to *Nelson v. State*¹⁰ for its ineffective assistance of counsel analysis. OPA characterized *Nelson* as holding that a criminal defendant cannot raise an ineffective assistance of counsel claim before a verdict. OPA

also noted that we did not extend the conflict in *Nelson* to the entire Agency. We limited the imputed conflict to the regional Agency office where the conflicted attorney worked. ¹¹

OPA next claimed that it was statutorily prohibited from representing Mathes because it was only authorized to take cases when the Agency had an "actual" or "legal" conflict of interest. It argued that a capacity-based conflict was not an actual conflict as contemplated by its authorizing statute. OPA also suggested that the superior court had exceeded its authority by asserting a conflict when the Agency, an executive branch entity, avowed that there was none. In OPA's view, the court's plan effectively "ordered the [Agency] to present indigent clients with a choice of counsel." And under *Daniels v. State*, ¹² OPA argued, a trial court cannot interfere with the administrative assignment of cases by presenting indigent clients a choice of counsel. Furthermore, OPA asserted, the superior court's conclusions would encourage Agency attorneys unable to meet deadlines to claim conflicts of interest or encourage clients to demand a new attorney when they are unsatisfied with the pace of their pending cases.

OPA also objected to its appointment to represent Mathes in six misdemeanor cases in addition to her felony case. OPA argued that there was no conflict in the misdemeanor cases, that its appointment was a clerical error because of ambiguity of the court's order, and that nothing in the record or the order indicated that the Agency lacked capacity to handle the misdemeanors. Finally, OPA asked the court to reappoint the Agency or appoint counsel under Administrative Rule 12(e).

The court denied OPA's motion on February 21. It first rejected OPA's argument that the factual basis of its order had changed, observing that OPA had not presented any evidence to support its argument. It reaffirmed that, based upon the record, the Agency had a conflict of interest that had not changed since the court's January 9 order.

The court next noted that OPA previously had refused its offer of an evidentiary hearing and that its representations on behalf of the Agency were ambiguous. The court found that it had the authority and duty to intervene to correct a conflict and ensure Mathes was adequately represented, that *Daniels* supported its position, and that *Nelson* did not limit a court to remedying an ineffective assistance of counsel claim only after a conviction.

The court reiterated its conclusion that the Agency had a conflict of interest under the professional rules and the federal and state constitutions. It held that this conflict arose from the deficit of Agency attorneys to handle its caseload, which led to almost three years of delays in Mathes's case and an expected further delay of at least five months. It held therefore that the Agency was permitted to withdraw and cited court decisions from across the country and formal opinions from both the American Bar Association and other state bar associations to bolster its conclusion.¹³

*7 The court concluded that AS 44.21.410(a)(4) required it to appoint OPA. It explained that because the statute did not exclude "temporary conflicts" and did not "limit the definition of the term 'interest' to exclude a person's interest in speedy, prompt, and diligent representation," OPA had to be appointed. The court rejected OPA's request to appoint Rule 12(e) counsel because Rule 12(e) counsel may be appointed only if neither the Agency nor OPA were authorized to accept the appointment. Finally, noting the issue was not moot because Mathes continued to suffer from the "lack of a *timely* attorney," the court rejected OPA's argument that the Agency had resolved the conflict by planning to assign its newly hired attorney to Mathes's cases six weeks later (emphasis in original). ¹⁴

Two days later, OPA moved to withdraw once again. It made a variety of arguments. It first argued that the Public Advocate was counsel of record in Mathes's case, which created statewide conflicts for OPA and compromised his neutrality as OPA's director. It argued that the Public Advocate's appointment was therefore directly adverse to Mathes. And it argued that because the Public Advocate was responsible for resource allocation for OPA, including contracting with outside attorneys, his appointment created a conflict with any case assigned to a contract attorney, including Mathes's codefendant's. Finally, OPA asserted that appointing it would further delay Mathes's case.

The court denied the motion. It first held that it had not created OPA's "perceived conflict" because it had "not assign[ed] the OPA director to represent ... Mathes." And it noted that if, as OPA claimed, there were any such perceived problems, they could be addressed by simply assigning the case to a staff attorney.

The court again concluded that OPA had not established that it or its contractors had conflicts and that it misconceived the nature of the Agency's conflict. The court reiterated that the conflict was due to an additional delay of at least five months "with an indefinite maximum" length before a specific Agency attorney could represent Mathes. It determined that because that conflict was "driven by the Agency's lack of capacity," the conflict required the court's intervention to ensure Mathes received effective assistance. The court clarified that it was not requiring "an attorney who could immediately try an unclassified felony," but only "someone who is available, *now*, to counsel ... Mathes, even on pretrial matters," and held that OPA's authorizing statute and the professional rules required OPA to provide that attorney (emphasis in original).

The court repeated its observation that OPA had not presented any evidence that it had a conflict or requested an evidentiary hearing to support its claim that it had the same conflict as the Agency. And the court dismissed OPA's argument that a lack of capacity in its local offices amounted to an agencywide conflict, pointing out that OPA is a statewide agency and AS 44.21.410(a)(4) required it to provide representation when the Agency had a conflict. The court concluded that "OPA has offered nothing to explain how the whole agency, which continues to enter appearances and resolve cases in courts around the state even as this order is being written, lacks the capacity to accept a single client's cases."

Two days later, OPA filed a motion for reconsideration, a motion for evidentiary hearing, and a motion to stay its appointment pending appellate review and appoint Rule 12(e) counsel to represent Mathes in the interim. The court denied the motions for reconsideration and an evidentiary hearing the next day. On March 3, OPA filed a motion in the court of appeals to stay its appointment and appoint Rule 12(e) counsel, noting it intended to file a petition for review.

*8 On March 6, the superior court denied the stay and ordered OPA to file an entry of appearance in Mathes's case. The court noted that a stay "would cause undue — and unconstitutional — delays in the appointment of counsel" for Mathes.

C. Original Application For Relief

On March 7, the court of appeals converted OPA's motion for stay of its appointment in the superior court to an original application for relief under Appellate Rule 404. ¹⁵ It certified OPA's original application to us in May under AS 22.05.015(b). ¹⁶

The court stated three reasons for its certification. First, "the issues presented here relate to questions of court administration and the allocation of statewide budgets — and the answers to these questions will have repercussions far beyond this individual case" which are "matters that fall directly within the Alaska Supreme Court's expertise." Second, "the issues presented here raise substantial questions

regarding the ethical obligations of appointed attorneys under the professional rules of responsibility, the oversight of which is vested in the supreme court." And finally, "the issues presented here relate to an on-going crisis involving state agencies and constitutional representation for indigent defendants that is of sufficient importance to warrant the supreme court granting a petition for hearing in this case."

We accepted certification and invited the Agency and prosecution to participate.¹⁷ On March 7, 2024, following oral argument, we ordered that OPA continue to represent Mathes in her cases through resolution in the trial courts. We promised a written opinion explaining our order; this is our explanation.

II. STANDARD OF REVIEW

[1] [2] [3] "Questions of statutory interpretation and constitutional issues are questions of law to which we apply our independent judgment."¹⁸ "Whether a conflict of interest exists under the Alaska Rules of Professional Conduct is an issue of law also reviewed de novo under the independent judgment standard."¹⁹ "In exercising our independent judgment, we will adopt the rule of law that is most persuasive in light of precedent, reason, and policy."²⁰

IV. DISCUSSION

A. The Superior Court Did Not Err By Intervening.

[4] [5] [6] "The Alaska Constitution 'vest[s] "legislative power in the legislature; executive power in the governor; and judicial power" in the courts.' "²¹ "Derived from this 'distribution of power among the three branches of government' is the separation of powers doctrine, which 'limits the authority of each branch to interfere in the powers that have been delegated to the other branches.' "²² "[T]he separation of powers and its complementary doctrine of checks and balances are part of the constitutional framework of this state."²³ It not only "protect[s] each branch's functional existence," it also "preclude[s] the exercise of arbitrary power and ... safeguard[s] the independence of each branch of government."²⁴

***9** [7] The Agency, OPA, and the Department of Law are all executive branch agencies, while the superior court is part of the judicial branch. "Under the separation of powers doctrine, '[w]hen an act is committed to executive discretion, the

exercise of that discretion within constitutional bounds is not subject to the control or review of the courts.' "²⁵ OPA argues that the court violated the separation of powers doctrine by intervening in the Agency's representation of Mathes. Specifically, it contends the court improperly interfered with the internal workings of an executive agency. It also argues that the court exceeded its authority by allowing Mathes the "choice" between Agency and OPA counsel and preventing the return of her cases to the Agency once the Agency enacted a plan to provide representation to Mathes and other affected clients until its new attorney arrived.

[8] As arms of the executive branch, the Agency, OPA, and the Department of Law are entitled to full independence, "subject to judicial authority and review only in the same manner and to the same extent as retained counsel."²⁶ We agree with other courts that have recognized that a court may not interfere with the management of public defender services unless "presented with a case that demonstrates that the [public defender agency's] operations violate the constitution, either because of unlawful managerial decisions or a lack of resources necessary for providing the effective representation required under our Constitution and statutes."²⁷

[13] But we also agree with the [9] [10] [11] [12] court of appeals that "[t]rial courts play an important role in safeguarding [the] constitutional right" of effective assistance."²⁸ Courts have an obligation to ensure the integrity of the justice system²⁹ and to ensure that defendants receive constitutionally effective assistance of counsel.³⁰ Compliance with the rules of professional conduct is a basic component of effective assistance.³¹ Courts must inquire when an apparent conflict of interest exists to ensure that the defendant receives conflict-free representation.³² To ensure conflict-free representation, courts may disgualify an attorney or condition continued representation upon a defendant's waiver of a conflict that is waivable under the ethics rules.³³

*10 [14] [15] We agree with the superior court that effective representation requires more than simply "show[ing] up for hearings." When the court determined the Agency was failing to provide representation consistent with its ethical and constitutional obligations, it instructed the Agency to take certain steps to remedy the situation. Concluding the Agency had a conflict of interest, the court ordered the Agency to withdraw and appointed OPA. Because the court had a duty to ensure Mathes's rights were protected, it did not violate the separation of powers doctrine by doing so.

In *Daniels v. State* the court of appeals determined the trial court abused its discretion by disqualifying a public defender because he had represented a witness ten years earlier in an unrelated matter.³⁴ The defense strategy involved suggesting that the witness had committed the crime being prosecuted.³⁵ The client waived any conflict of interest due to the past representation, and after consulting with independent counsel, the witness did not perceive any conflict, but the court granted the prosecution's motion requiring the public defender to withdraw.³⁶ The court of appeals noted that although indigent defendants do not have the right to demand a particular attorney, "courts do not disqualify an attorney on the grounds of conflict of interest unless the former client moves for disqualification."³⁷ Because the conflict was waivable and neither client nor their attorneys claimed that a conflict of interest existed, the court of appeals reversed the trial court's withdrawal order. ³⁸

OPA's claim that the superior court gave Mathes a "choice" of counsel mischaracterizes the court's order. The court ordered the Agency to advise affected clients that they would have to waive any claim of ineffective assistance of counsel until a permanent attorney was assigned to their case if they wished to remain represented by the Agency. The court ordered the Agency to withdraw from any case in which the client did not waive the conflict. Agency clients were not given a choice of preferred counsel as OPA suggests.

Nor did the superior court "prevent[] transfer" back to the Agency as OPA alleges. The Agency withdrew from Mathes's cases, as ordered, because she did not waive the conflict of interest. OPA did not give the court any basis to transfer Mathes's cases back to the Agency.

*11 [16] OPA challenges the court's conclusions that the affected clients had been inadequately represented for months and that the Agency's "floating" approach would result in further inadequate representation. But as the court explained in its order denying OPA's motion to vacate its appointment, neither OPA nor the Agency presented any evidence to suggest that representing Mathes was no longer beyond the Agency's capacity. Although the court was satisfied by the temporary attorney's stated intention to actively represent the clients in the four cases to which he was assigned, neither he nor the Agency gave the court similar assurances in Mathes's

case. The record before the court made clear that Mathes's former attorney had not actively worked her case for at least two months before her resignation and the Agency could not assign an attorney to actively work on her case for another three months. Such delay was "excessive" when Mathes had been charged three years prior and "was pushing to vindicate her right to a speedy trial."

[17] OPA argues that the superior court exceeded its authority by requiring defendants to waive their rights to claim ineffective assistance of counsel. The superior court ordered that the clients "waive their right to the effective assistance of counsel" if they wished to remain represented by the Agency, rather than specifying the more usual waiver of speedy trial. The court determined that the affected clients would not have meaningful representation for nearly five months and that the delay would conflict with their speedy trial rights under the state and federal constitutions.³⁹ It also concluded that the delay was likely to be far beyond the 120-day trial deadline in Alaska Criminal Rule 45.⁴⁰ But criminal defendants can and often do waive their speedy trial rights.⁴¹ The delay resulting from the Agency's plan thus required clients waive their speedy trial rights if they wanted to remain with the Agency until a new attorney was hired. The superior court's somewhat inartful language does not amount to a reversible error.

OPA also argues that the superior court's interpretation of *Perez v. State* was flawed and *Perez* should not be extended to allow courts to intrude into the management decisions of executive agencies.⁴² It argues that *Perez* "presented a different situation" because it involved a client to whom no attorney was assigned for five months, while the clients here had individual counsel at all times.⁴³ From this OPA argues that the superior court erred by concluding that *Perez* required an attorney to be "actually" assigned to the case.

Contrary to OPA's claim, however, *Perez* did not hold only that assigning an individual attorney to a defendant was required. In *Perez* the defendant had "no attorney keeping track of his case between pretrial hearings, no attorney communicating with him outside these hearings, no attorney reviewing the discovery and discussing it with him, and no attorney assisting him with other pretrial matters" for five months. ⁴⁴ Under these circumstances, the court of appeals held that the superior court "had an affirmative duty to act [to safeguard the defendant's constitutional right to counsel]

when it became clear that [he] had no attorney assigned" and that the "conflict issues ... were not being timely resolved." ⁴⁵

*12 [18] In both *Perez* and Mathes's case, the court was concerned that a defendant was not receiving effective representation. When it is apparent to the court that a defendant is not receiving effective representation, the court has an affirmative duty to intervene.⁴⁶

B. The Superior Court Did Not Err By Appointing OPA.

OPA disagrees with the superior court's conclusion that a capacity-based conflict is a conflict of interest under the enabling statute authorizing its appointment. ⁴⁷ OPA argues that the legislative history of AS 44.21.410(a)(4) and 30 years of practice show that it was created to represent indigent defendants when the Agency has an "actual" conflict of interest, such as in cases of codefendant representation, not as an "overflow" agency to fill in when the Agency is "over capacity." It argues that the superior court therefore erred by appointing it when it found that Mathes could not be represented by the Agency due to its lack of capacity.

1. Lack of capacity can be a disqualifying conflict of interest.

Rule of Professional Conduct 1.7(a) provides that a lawyer "shall not represent a client if the representation involves a concurrent conflict of interest." Subsection (a)(2) of the rule goes on to define a concurrent conflict of interest as arising when there is "a significant risk that the representation of one or more clients will be materially limited by the lawyer's responsibilities to another client."⁴⁸

Rule 1.1(a) requires attorneys to provide "competent" representation to their clients. Competent representation entails the "thoroughness and preparation reasonably necessary for the representation."⁴⁹ And under Rules 1.3 and 3.2, attorneys have a duty to "act with reasonable diligence and promptness in representing a client"⁵⁰ and to "make reasonable efforts to expedite litigation consistent with" a client's interests. ⁵¹ Commentary to Rule 1.3 specifies that "[a] lawyer's work-load must be controlled so that each matter can be handled competently."

[19] A situation in which an attorney is overloaded with cases compromises the attorney's ability to comply with relevant rules of professional conduct and may deny a defendant effective assistance of counsel.⁵² When an attorney is assigned too many cases, the risk increases that the attorney's ability to represent any one client may be limited by responsibilities to others. As a caseload increases, the attorney's ability to bring to each case the thoroughness and preparation necessary to provide competent representation may diminish. And as the number of assigned cases increases, the attorney's ability to promptly and diligently expedite any one case may decrease.

[20] Courts from other jurisdictions have also concluded that a shortage of public defenders and the resulting excessive caseloads can amount to a conflict of interest because the attorneys must choose between the rights of their clients. ⁵³ Rule 1.7(a)(2)'s plain language, when read in conjunction with the other professional rules' requirements, makes clear that a public defender agency's inability to provide effective assistance because of a lack of attorneys or hours can amount to a conflict of interest.

*13 OPA asserts that an evidentiary hearing should be required when the Agency alleges it is "over capacity" and asks that we establish such a procedure. It argues that because the superior court did not hold an evidentiary hearing, we should vacate its order. But OPA declined the court's invitation to have an evidentiary hearing ⁵⁴ and the superior court made adequate findings. Because the court's process and factual findings are sufficient for our review, we see no need to require more.

2. Alaska Statute 44.21.410(a)(4) requires OPA to take a case if the Agency has a conflict of interest due to a capacity conflict.

Alaska Statute 44.21.410(a)(4) requires OPA to provide legal representation "in cases involving indigent persons who are entitled to representation [by the Agency] and who cannot be represented by the public defender agency because of a conflict of interests." The statute does not define "conflict of interests." The superior court reasoned that "[t]he existence of a conflict at the time of withdrawal is enough to justify an OPA appointment" because "[t]he statute does not inquire about the nature of a conflict, or whether the conflict is temporary."

OPA contends that a conflict of interest due to lack of capacity is not the sort of conflict contemplated by the legislature when

it enacted AS 44.21.410(a)(4). It argues that a "conflict of interest" under AS 44.21.410(a)(4) "has always meant an actual/legal conflict arising under the Professional Conduct Rules — most often Rule 1.7."

[21] [22] OPA seems to suggest that the "actual" conflicts of interest in AS 44.21.410(a)(4) are limited to conflicts presenting adverse representation "such as multi-defendant cases." It points to legislative history and "the history of the agencies' transactions" to support its interpretation. But the plain language of the statute says nothing about the type of conflict that authorizes OPA's appointment. And OPA falls well short of overcoming its heavy burden to show that the legislature intended to give the term "conflict of interests" OPA's preferred meaning.

[23] [24] [25] "In the absence of a [statutory] definition, we construe statutory terms according to their common meaning[;] [d]ictionaries provide a useful starting point for this exercise." ⁵⁵ "The plainer the statutory language is, the more convincing the evidence of contrary legislative purpose or intent must be." ⁵⁶ "If the language is 'clear and unambiguous,' then 'the party asserting a different meaning bears a correspondingly heavy burden of demonstrating contrary legislative intent.' "⁵⁷

The plain language of the statute does not exclude conflicts based on lack of capacity. Black's Law Dictionary defines a "conflict of interest" as "[a] real or seeming incompatibility between two interests that one possesses or is obligated to serve" or "[a] real or seeming incompatibility between the interests of two of a lawyer's clients, such that the lawyer is disqualified from representing both clients if the dual representation adversely affects either client or if the clients do not consent." 58 Merriam-Webster defines the term as "a conflict between competing duties." 59 And the American Heritage Dictionary defines it as "[a] conflict between a person's private interests and public obligations."⁶⁰ The Restatement (Third) of the Law Governing Lawyers defines a conflict of interest as a circumstance in which "there is a substantial risk that the lawyer's representation of the client would be materially and adversely affected by the lawyer's own interests or by the lawyer's duties to another current client, a former client, or a third person."⁶¹ It does not distinguish between particular kinds of conflicts.⁶²

*14 Other authorities from the time AS 44.21.410 was enacted are in agreement. The statute was passed in 1984.⁶³ Just one year earlier, the American Bar Association (ABA) adopted the Model Rules of Professional Conduct. ⁶⁴ Those rules identified impermissible conflicts of interest as situations in which representation of a client "will be directly adverse to another client" or "may be materially limited by the lawyer's responsibilities to another client."⁶⁵ The 1990 edition of Black's Law Dictionary incorporated the ABA's standard into its definition of "conflict of interest," explaining that "[t]he Code of Professional Responsibility and Model Rules of Professional Conduct set forth standards for actual or potential conflicts of interest between attorney and client."⁶⁶ None of these definitions suggests that the term refers only to a subsection of all conflicts of interest. Given that the plain language of -AS 44.21.410(a)(4) does not exclude particular types of conflicts of interest, OPA bears a "heavy burden" to demonstrate the legislature intended such an exclusion.⁶⁷

OPA does not satisfy that burden. OPA was established in the wake of lawsuits challenging the court system's former practice of appointing private attorneys to represent indigent defendants when the Agency had a conflict of interest.⁶⁸ The court system was already contracting with private counsel at great cost and faced even greater expenses if the lawsuits were successful.⁶⁹ OPA was proposed as cost-savings solution "to handle many cases where the public defender had a conflict."70 It could "pass cases back and forth and avoid conflict situations."⁷¹ The governor's transmittal message to the legislature declared that OPA would be "empowered to provide public guardian and guardian ad litem services as well as legal representation to indigent persons, when authorized by existing statutes."⁷² He hailed the proposed agency as "permit[ting] efficient sharing of resources, including space, personnel, clerical support, and other administrative costs."⁷³

[26] This legislative history only bolsters our conclusion that "a conflict of interests" in AS 44.21.410(a)(4) means *all* conflicts of interests and that OPA has not carried its burden to show that it means only certain conflicts. Legislative deliberations and related testimony mainly discussed the fiscal benefits of creating an agency to handle cases where the Agency had a conflict, not what constituted a conflict.⁷⁴ The governor's transmittal message similarly focused on the cost savings and more efficient provision of representation for indigent criminal defendants that would result from OPA's creation without mention of the type of conflict that would lead to OPA's appointment.⁷⁵

*15 OPA also argues that it and the Agency have historically understood "conflicts" to only mean "actual conflicts" involving their clients, despite having no memorandum documenting their understanding. OPA invites us to adopt its limited definition of "conflict of interests" based on the agencies' practice. But such a practice cannot overcome the statute's plain language and legislative history, which do not reveal any legislative intent to give the phrase "conflict of interests" a meaning that would exclude conflicts due to capacity.

Alaska Statute 44.21.410(a)(4)'s plain language requires OPA to provide legal representation to indigent persons who cannot be represented by the Agency due to a conflict of interests. Conflicts of interests include those resulting from the Agency's lack of capacity to provide effective representation.⁷⁶

V. CONCLUSION

We AFFIRM the superior court's order appointing OPA to represent Mathes.

All Citations

---- P.3d ----, 2025 WL 498790

Footnotes

- * Sitting by assignment made under article IV, section 11 of the Alaska Constitution and Alaska Administrative Rule 23(a).
- 1 OPA is authorized to contract with attorneys to provide representation when its staff attorneys have conflicts of interest. See AS 44.21.430.
- It first decided not to sanction the Agency, although it concluded that the Agency bore some responsibility for the situation that led to the attorney's resignation. The court found that an Agency supervisor should have at least been aware of the problems with the flight the attorney booked and directed her to ensure the situation did not repeat itself. The court noted that this "conflict reveal[ed] the Agency's failures" because it had not noticed warning signs from the attorney's performance, intervened by ordering the attorney to take leave, or otherwise addressed the impending problem.
- 3 521 P.3d 592, 598-99 (Alaska App. 2022) (holding trial court had "affirmative duty to act" to remedy Agency's failure to assign counsel for defendant for five months).
- 4 It noted that the court of appeals previously had commented favorably on the view that an unsustainable workload could create a conflict under Rule 1.7(a)(2), citing an unpublished order in *Donnelly v. State*, Nos. A-13597/13598 (Alaska Court of Appeals Order, Nov. 3, 2021) (unpublished order on motion to permit withdrawal of counsel).
- 5 The superior court used the term "permanent" as a "shorthand" to mean an attorney who, when entering an appearance, intended to represent the client until trial.
- 6 Alaska Admin. R. 12(e) authorizes a court to appoint "counsel, or a guardian ad litem, or other representative" for an indigent person if the court determines that the appointment is "required by law or rule" but is not

authorized under AS 18.85.100(a) or AS 44.21.410, which provide for appointment of attorneys for indigent persons by the Agency or OPA.

- 7 At issue in *Perez* was the right to assistance of counsel for an Agency client who was not assigned an attorney for over five months. *Perez*, 521 P.3d at 598.
- 8 521 P.3d 592 (Alaska App. 2022).
- 9 Nos. A-13597/13598 at *3 (Alaska App. Order, Nov. 3, 2021) (unpublished order on motion for withdrawal of counsel).
- ¹⁰ P.3d 240, 243-44, 247-48 (Alaska 2019).
- 11 *Id.* at 246 & n.23.
- ¹² P.3d 75 (Alaska App. 2001).
- The court cited State v. Smith, 140 Ariz. 355, 681 P.2d 1374 (1984); In re Edward S., 173 Cal.App.4th 387, 92 Cal. Rptr. 3d 725, 746-47 (2009); People v. Roberts, 321 P.3d 581, 589 (Colo. App. 2013); In re Ord. on Prosecution of Crim. Appeals by Tenth Jud. Cir. Pub. Def., 561 So. 2d 1130 (Fla. 1990); United States v. Hanhardt, 155 F. Supp. 2d 861, 871 (N.D. III. 2001); State v. Peart, 621 So. 2d 780 (La. 1993); Carrasquillo v. Hampden Cnty. Dist. Cts., 484 Mass. 367, 142 N.E.3d 28, 49 (2020); State ex rel. Mo. Pub. Def. Comm'n v. Waters, 370 S.W.3d 592, 607-08 (Mo. 2012) (en banc); United States v. De Castro-Font, 583 F. Supp. 2d 243, 247-48 (D.P.R. 2008); Lozano v. Cir. Ct. of Sixth Jud. Dist., 460 P.3d 721 (Wyo. 2020). For formal opinions the superior court cited to, see ABA Comm. on Ethics & Pro. Resp., Formal Op. 06-441 (2006); Colo. Bar Ass'n, Formal Op. 146 (2022); Or. State Bar, Formal Op. No. 2007-178 (2007); S.C. Bar Ethics Advisory Comm, Ethics Advisory Op. 04-12 (2004); State Bar of Wis., Formal Op. E-84-11 (1998).
- 14 The court acknowledged that it had not considered Mathes's misdemeanor cases in its original order but nonetheless continued OPA's appointment, noting that OPA had not requested a hearing to contest the Agency's basis for withdrawal and had not presented any evidence that the Agency did not have a conflict.
- 15 Alaska R. App. P. 404 (authorizing original application for relief in appellate court when "relief is not available from any other court and cannot be obtained through process of appeal, petition for review, or petition for hearing").
- 16 AS 22.05.015(b) (authorizing certification of questions "involv[ing] a significant question of law under the Constitution of the United States or under the constitution of the state or involv[ing] an issue of substantial public interest that should be determined by the supreme court").
- 17 Off. of Pub. Advocacy v. Super. Ct. First Jud. Dist., No. S-18741 (Alaska Supreme Court Order, June 19, 2023).
- 18 Alaska Pub. Def. Agency v. Super. Ct., 450 P.3d 246, 251 (Alaska 2019).
- ¹⁹ Nelson v. State, 440 P.3d 240, 243-44 (Alaska 2019); see also Burrell v. Disciplinary Bd. of Alaska Bar Ass'n, 702 P.2d 240, 242-43 (Alaska 1985).

- ²⁰ *Healy Lake Vill. v. Mt. McKinley Bank*, 322 P.3d 866, 871 (Alaska 2014) (quoting *John v. Baker*, 982 P.2d 738, 744 (Alaska 1999)).
- 21 State v. Recall Dunleavy, 491 P.3d 343, 367 (Alaska 2021) (alteration in original) (quoting Jones v. State, Dep't of Revenue, 441 P.3d 966, 981 (Alaska 2019)).
- 22 Id. (quoting Alaska Pub. Int. Rsch. Grp. v. State, 167 P.3d 27, 35 (Alaska 2007)).
- 23 Id. (quoting Alaska Pub. Int. Rsch. Grp., 167 P.3d at 34-35).
- 24 Id. (quoting Alaska Pub. Int. Rsch. Grp., 167 P.3d at 35).
- ²⁵ Jackson v. State, 127 P.3d 835, 836 (Alaska App. 2006) (alteration in original) (quoting Pub. Def. Agency v. Super. Ct., 534 P.2d 947, 950 (Alaska 1975)).
- AM. BAR ASS'N STANDING COMM. ON LEGAL AID & INDIGENT DEFENDANTS, TEN PRINCIPLES OF A PUBLIC DEFENSE DELIVERY SYSTEM, 3 (2023), https://www.americanbar.org/content/dam/aba/ administrative/legal_aid_indigent_defendants/ls-sclaid-ten-princ-pd-web.pdf; *see also, e.g., Kerr v. Parsons*, 378 P.3d 1, 12 (N.M. 2016) (Vigil, J., concurring specially) ("In the absence of a constitutional violation, it is imperative in the administration of justice that we respect the independence of the Department and the Commission and refrain from interfering with their internal management decisions."); *In re Certification of Conflict in Motions to Withdraw Filed by Pub. Def. of Tenth Jud. Cir.*, 636 So. 2d 18, 23 (Fla. 1994) (Harding, J., concurring) ("Except in the most unusual circumstances, I would leave th[e] decision [of who should exercise authority and make decisions about whether the public defender has the resources to perform all the responsibilities required by law] with the public defender and as a court would not second-guess it.").
- 27 Kerr, 378 P.3d at 13 (Vigil, J., concurring specially); accord id. at 10 (majority opinion) ("Where there is no violation of right, a court lacks the power to compel an officer of a coordinate branch of government to perform a duty."); see also Lavallee v. Justs. in Hampden Super. Ct., 812 N.E.2d 895, 910-11 (Mass. 2004) (requiring prosecution to be dismissed if no attorney appeared for indigent defendant within 45 days of arraignment); In re Certification of Conflict, 636 So. 2d at 22 (holding court did not interfere with management of public defender's office by reviewing its motion to withdraw because its inquiry was limited to existence of factual basis for motion); id. at 23 (Harding, J., concurring) ("It is only when the decision of a public defender")

impacts significantly upon the court that any inquiry should be made."); *Cuyler v. Sullivan*, 446 U.S. 335, 347, 100 S.Ct. 1708, 64 L.Ed.2d 333 (1980) ("Unless the trial court knows or reasonably should know that a particular conflict exists, the court need not initiate an inquiry.").

- 28 Perez v. State, 521 P.3d 592, 598 (Alaska App. 2022).
- Alaska Code Jud. Conduct Canon 1; see, e.g., Bunton v. Alaska Airlines, Inc., 482 P.3d 367, 373-74 (Alaska 2021); Alvarez-Perdomo v. State, 454 P.3d 998, 1008 (Alaska 2019).
- See, e.g., Powell v. Alabama, 287 U.S. 45, 71, 53 S.Ct. 55, 77 L.Ed. 158 (1932) ("[T]he failure of the trial court to make an effective appointment of counsel was ... a denial of due process."); Moreau v. State, 588 P.2d 275, 283-84 & n.27 (Alaska 1978) (imposing on trial court obligation to advise defendants of "potential dangers of representation by counsel with a conflict of interest" and obtain voluntary waiver of constitutional protections for such representation to proceed (quoting State v. Olsen, 258 N.W.2d 898, 906 (Minn. 1977))); Risher v. State, 523 P.2d 421, 423 (Alaska 1974) ("The mere fact that counsel represents")

an accused does not assure this constitutionally-guaranteed assistance. The assistance must be 'effective' to be of any value." (quoting *McCracken v. State*, 521 P.2d 499, 508 (Alaska 1974))).

- ³¹ See Wood v. Georgia, 450 U.S. 261, 271, 101 S.Ct. 1097, 67 L.Ed.2d 220 (1981).
- See, e.g., Pid. at 272, 101 S.Ct. 1097 (noting that while it was unclear if "actual conflict of interest was present," record demonstrated "[t]he *possibility* of a conflict was sufficiently apparent ... to impose upon the court a duty to inquire further" (emphasis in original)); *Perez*, 521 P.3d at 598 ("Trial courts play an important role in safeguarding th[e] constitutional right [to the assistance of counsel in all critical stages of a criminal

prosecution]."); State v. Peart, 621 So. 2d 780, 787 (La. 1993) ("If the trial court has sufficient information before trial, the judge can most efficiently inquire into any inadequacy [of representation] and attempt to

remedy it."); *cf. Cuyler*, 446 U.S. at 347, 100 S.Ct. 1708 ("Unless the trial court knows or reasonably should know that a particular conflict exists, the court need not initiate an inquiry.").

³³ See *Wheat v. United States*, 486 U.S. 153, 159-60, 108 S.Ct. 1692, 100 L.Ed.2d 140 (1988) (requiring trial court to take appropriate measures to protect criminal defendants from attorney's conflict of interest);

Daniels v. State, 17 P.3d 75, 82 (Alaska App. 2001) ("[A] defendant's right to waive their attorney's conflict of interest is not absolute; '[the] courts have an independent interest in ensuring that criminal trials are conducted within the ethical standards of the profession and that legal proceedings appear fair to all who

observe them.' " (alteration in original) (quoting *United States v. Locascio*, 6 F.3d 924, 931 (2d Cir. 1993))); *Perez*, 521 P.3d at 599 (observing trial court failed to fulfill duty to safeguard defendant's constitutional right to counsel).

- ³⁴ *Daniels*, 17 P.3d at 78, 86-87.
- 35 Pld.
- ³⁶ *Id.* at 78-79.
- ³⁷ *Id.* at 82 (quoting *United States v. Rogers*, 9 F.3d 1025, 1031 (2d Cir. 1993)).
- ³⁸ *Id.* at 79, 87.
- 39 U.S. Const. amend. VI; Alaska Const. art. I, § 11.
- 40 Alaska R. Crim. P. 45(b) ("A defendant charged with a felony, a misdemeanor, or a violation shall be tried within 120 days.").
- See, e.g., Glasgow v. State, 469 P.2d 682, 686-87 (Alaska 1970) (concluding court cannot infer generally waiver of constitutional speedy trial right from mere silence but defendant may "knowingly and intelligently waive[] such constitutional rights"); Rutherford v. State, 486 P.2d 946, 950 (Alaska 1971) (same); Conway v. State, 707 P.2d 930, 934 (Alaska App. 1985) (noting criminal defendant may "waive or under certain circumstances forfeit the right to assert a speedy trial violation"); James v. State, 567 P.2d 298, 300 (Alaska 1977) (concluding defendant forfeited right to complain of speedy trial rule violation by failing to complain before voir dire); Trudeau v. State, 714 P.2d 362, 365-66 (Alaska App. 1986) (concluding superior court did not err by finding defendant forfeited right to complain of speedy trial violation by waiting

until after jury selection); *Alaska Pub. Def. Agency v. Super. Ct.*, 530 P.3d 604, 609-10 (Alaska App. 2023) (holding continuance under Rule 45 requires consent of defendant).

- 42 Perez v. State, 521 P.3d 592 (Alaska App. 2022).
- 43 See *id.* at 595-97.
- 44 *Id.* at 598.
- 45 *Id.*
- 46 See id.
- ⁴⁷ See AS 44.21.410(a)(4) (requiring OPA to represent indigent persons that qualify for Agency representation when Agency has conflict of interest).
- 48 Alaska R. Prof. Conduct 1.7(a)(2).
- 49 Alaska R. Prof. Conduct 1.1(a).
- 50 Alaska R. Prof. Conduct 1.3.
- 51 Alaska R. Prof. Conduct 3.2.
- 52 See Carrasquillo v. Hampden Cnty. Dist. Cts., 484 Mass. 367, 142 N.E.3d 28, 48-49 (2020) (concluding same based on Massachusetts's Professional Conduct Rules, which are worded nearly identically).
- 53 See, e.g., In re Edward S., 173 Cal.App.4th 387, 92 Cal. Rptr. 3d 725, 746-47 (2009) ("[A] conflict of interest is inevitably created when a public defender is compelled by his or her excessive caseload to choose

between the rights of the various indigent defendants he or she is representing."); People v. Roberts, 321

P.3d 581, 589 (Colo. App. 2013) (same); In re Ord. on Prosecution of Crim. Appeals by Tenth Jud. Cir. Pub. Def., 561 So. 2d 1130, 1135 (Fla. 1990) ("When excessive caseload forces the public defender to choose between the rights of the various indigent criminal defendants he represents, a conflict of interest is inevitably created."); Carrasquillo, 142 N.E.3d at 48-49 ("Requiring defense attorneys to take on more clients than they can reasonably handle may impede their ability to meet [the] obligation" to "act with reasonable diligence and

promptness in representing a client" and "may create concurrent conflicts of interest."); *United States ex rel. Green v. Washington*, 917 F. Supp. 1238, 1275 (N.D. III. 1996) ("When an agency such as [the Office of the State Appellate Defender] is appointed to more cases than it can timely handle, ... conflicts of interest are necessarily created as a surfeit of clients compete for the scarce resources of available attorney time and

attention."); State ex rel. Mo. Pub. Def. Comm'n v. Waters, 370 S.W.3d 592, 608 (Mo. 2012) (en banc) (same).

- 54 OPA later moved for an evidentiary hearing along with its motion for reconsideration, which the court denied because new evidence cannot be introduced in connection with a motion to reconsider.
- 55 State, Dep't of Fam. & Cmty. Servs., Off. of Child.'s Servs. v. Karlie T., 538 P.3d 723, 730 (Alaska 2023) (alterations in original) (quoting State v. Recall Dunleavy, 491 P.3d 343, 359 (Alaska 2021)).
- 56 Id. (quoting State, Dep't of Com., Cmty. & Econ. Dev., Div. of Ins. v. Alyeska Pipeline Serv. Co., 262 P.3d 593, 597 (Alaska 2011)).

- ⁵⁷ *Guerin v. State*, 537 P.3d 770, 778 (Alaska 2023) (quoting *State v. Planned Parenthood of the Great Nw.*, 436 P.3d 984, 992 (Alaska 2019)).
- 58 Conflict of Interest, BLACK'S LAW DICTIONARY (12th ed. 2024) (citing MODEL RULES OF PRO. CONDUCT r. 1.7(a) (AM. BAR ASS'N 2013)).
- 59 Conflict of Interest, MERRIAM-WEBSTER'S DICTIONARY (2024).
- 60 Conflict of Interest, AMERICAN HERITAGE DICTIONARY (5th ed. 2016).
- 61 RESTATEMENT (THIRD) OF THE L. GOVERNING LAWYERS § 121 (AM. L. INST. 2000).
- 62 See id.
- 63 Ch. 55, § 1, SLA 1984.
- 64 Model Rules of Professional Conduct, 69 A.B.A.J. 1592, 1671 (1983).
- 65 *Id.* at 1678.
- 66 Conflict of Interest, BLACK'S LAW DICTIONARY (6th ed. 1990).
- ⁶⁷ See Guerin v. State, 537 P.3d 770, 778 (Alaska 2023).
- ⁶⁸ See Wood v. Super. Ct., 690 P.2d 1225 (Alaska 1984); DeLisio v. Alaska Super. Ct., 740 P.2d 437 (Alaska 1987).
- 69 Minutes, S. Fin. Comm. Hearing on S.B. 312, 13th Leg., 2d Sess. (Feb. 2, 1984) (testimony of Arthur H. Snowden, Admin. Dir., Alaska Ct. Sys.).
- 70 Minutes, S. Fin. Comm. Hearing on S.B. 312, 13th Leg., 2d Sess. (Apr. 27, 1984) (statement of Sen. Albert Adams, Chair).
- 71 Minutes, S. Fin. Comm. Hearing on S.B. 312, 13th Leg., 2d Sess. (Feb. 2, 1984) (testimony of Arthur H. Snowden, Admin. Dir., Alaska Ct. Sys.).
- 72 1983 S. Journal 1251.
- 73 Id.
- 74 See Minutes, S. Fin. Comm. Hearing on S.B. 312, 13th Leg., 2d Sess. (Apr. 27, 1984) (comments of Rep. Terry Martin); Minutes, House Jud. Comm. Hearing on S.B. 312, 13th Leg., 2d Sess. (Mar. 7, 1984) (testimony of Karla Forsythe, Gen. Counsel, Alaska Ct. Sys.).
- 75 See 1983 S. Journal 1250-51. The message only mentioned conflicts of interest once, describing Alaska's then-current practice of appointing private attorneys. *Id.* at 1250 ("The court system, by statute ... appoints and compensates attorneys who represent indigent persons when the public defender agency cannot provide an attorney because of a conflict of interests.").
- 76 OPA also argues the court should have appointed counsel under Alaska Administrative Rule 12(e) because it found the Agency had a capacity conflict. But because the superior court did not err by intervening and appointing OPA to represent Mathes under AS 44.21.410(a)(4), Rule 12(e) does not apply.

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End of Document

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TERRELL MARSHALL LAW GROUP PLLC

March 26, 2025 - 11:45 AM

Transmittal Information

Filed with Court:	Supreme Court
Appellate Court Case Number:	103,252-8
Appellate Court Case Title:	Access to case information is limited

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 1032528_Briefs_20250326114404SC637205_1171.pdf This File Contains: Briefs - Petitioner S Opening Brief (PRP) The Original File Name was Petitioner Opening Brief w Appendix.pdf

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Comments:

Sender Name: Holly Rota - Email: hrota@terrellmarshall.com

Filing on Behalf of: Toby James Marshall - Email: tmarshall@terrellmarshall.com (Alternate Email:)

Suite 300 Seattle, WA, 98103 Phone: (206) 816-6603

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WASHINGTON STATE BAR ASSOCIATION

TO:	Board of Governors
FROM:	Terra Nevitt, Executive Director
	Paris A. Eriksen, Manager of Volunteer Engagement
DATE:	May 1, 2025

RE: WSBA Governor At Large

<u>ACTION</u>: Approve the recommendations from the Diversity, Equity and Inclusion Council or determine an alternate action.

Summary

The Board of Governors is asked to approve the Council's recommendation to include two candidates on the ballot for Governor At-Large position or take an alternative action, such as:

- extend the deadline and solicit additional candidates, or
- adopt an interpretation (or amendment) of the relevant WSBA Bylaws to clarify what action(s) the Board could take in circumstances where the DEI Council forwards less than three applicants., or
- table this action item to the next regularly scheduled meeting and approve an emergency amendment to the Bylaws to move the dates of the election until after the next regularly scheduled meeting (July 17-18,2025).

Overview

The election of Governor At Large is scheduled to begin on May 15, as set forth in the WSBA Bylaws. The WSBA received three applications. As indicated above, the Diversity, Equity and Inclusion Council has forwarded two of the three candidates for placement on the ballot to be elected by all eligible members. Although there are no other candidates, the WSBA Bylaws state, 'If the DEI Council forwards less than three candidates by May 1, the Executive Director shall notify the BOG, which may, at its option, select additional qualifying candidates on its own or place only those candidates forwarded by the DEI Council on the ballot to be elected by all eligible voting members.' The Bylaws also state that the Governor At Large election shall take place May 15 – June 1.

The Board last took up this same question in May 2022. At that time, the Board opted not to seek additional candidates, but did not take action to clarify the meaning of the Bylaw language.

Attachments:

Memo from the Diversity Equity and Inclusion Council dated May 1, 2025

WASHINGTON STATE BAR ASSOCIATION

Memo

То:	Terra Nevitt, Executive Director
CC:	Paris Ericksen, Volunteer Engagement Advisor
From:	Raina Wagner and Governor Nam Nguyen, DEI Council Co-Chairs
Date:	May 1, 2025
Re:	DEI Council's Recommendation for Member At-Large Candidates

There were three applicants for the Member At-Large seat on the Board of Governors:

- 1. Christopher Bhang
- 2. Uzma Hamid
- 3. Scott Stafne

Each applicant was scheduled for a 15-minute interview on April 30, 2025, and was given the following interview questions in advance of the interview:

- 1. Can you share about your lived experience and knowledge of the needs of members who have been historically underrepresented in governance?
- 2. What is your understanding of the purpose of the At Large role and how do you intend to fulfill the obligation of the role?
- 3. General Rule 12.2 provides that the WSBA should strive to promote diversity and equality in the legal profession and courts. How do you think the Board of Governors should carry out this responsibility under 12.2?
- 4. One of the WSBA Guiding Principles is to "promote diversity, equity and inclusion in the legal system and the legal profession to improve the quality of legal services available to the public and to improve public trust and confidence in the legal system." Can you share how your experience and knowledge will help the Bar advance this principle?

The Diversity, Equity and Inclusion Council interviewed Christopher Bhang and Scott Stafne. Uzma Hamid informed the staff to the Council a few hours prior to her scheduled interview that she had a family emergency and asked whether it was possible to reschedule her interview. Staff told her that due to the prescribed timeline of the application and election process, rescheduling was not possible. Staff told her that she could still be considered based on her application materials because the interview was not a prerequisite for consideration. Uzma Hamid confirmed that she would still like to be considered for the ballot.

In addition to the interviews, the Council reviewed the materials submitted by every applicant, which are attached to this memorandum.

The DEI Council reviewed WSBA Bylaw VI(C)(3)(a), noting that the Council shall forward to the Executive Director candidates "who have a lived experience and knowledge of the needs of those members whose membership is or may be historically underrepresented in governance to the end that the BOG will be a more diverse and representative body than the results of the election of Governors based solely on Congressional Districts may allow." The Bylaws also provide that "diversity refers to meaningful representation of, and equal opportunities for, individuals who have a lived experience as a member from one or more historically underrepresented communities in the legal profession. Underrepresentation encompasses and is not limited to, race, disability, age, ethnicity, religion, sexual orientation, gender identity, and gender expression."

Upon reviewing the applicants' materials, interview and relevant Bylaws, the Council is forwarding the following people to be placed on the ballot:

- Christopher Bhang
- Uzma Hamid

The Council based its decision on the applicants' stated lived experience and knowledge of the needs of members whose membership is or may be historically represented in governance.

If you have any questions, please contact the DEI Council staff liaison, Diana Singleton.

At-Large Election Schedule

Start Time-End Time	Name
3:15 pm - 3:30 pm	Scott Erik Stafne
3:35 pm - 3:50 pm	Christopher Bhang
3:55 pm - 4:10 pm	Uzma Munir Hamid

WASHINGTON STATE BAR ASSOCIATION

Board of Governors – Governor At-Large - Application Form

All Application materials must be received by 5 p.m. PST on Tuesday, April 15, 2025. Late materials will not be accepted.

INSTRUCTIONS

- 1. Review <u>all</u> information regarding board service, the application and the election processes <u>online here</u>.
- 2. Complete this required application form. If you are nominating someone else, ask them to sign it below.
- **3.** Email this signed form and materials to <u>barleaders@wsba.org</u>. Applications must be received by 5 p.m. PST on Tuesday, April 15 2025. Late materials will not be accepted.

Applicant Information	
Name	Scott Erik Stafne
WSBA Bar #	6964
Email Address	scott@stafnelaw.com
Phone Number	425 345 2408

Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor At-Large.

Scott Erik Stafne	6964
Name of Candidate (please print)	WSBA Bar #
Signature of Nominator (if applicable)	WSBA Bar #

s/	Scott	Erik Stafne	
5	JUULL	LINK Stame	

Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on April 15, 2025. Filing may be accomplished by emailing the scanned form to <u>barleaders@wsba.org</u>. For questions, please email Manager of Volunteer Engagement Paris Eriksen, at <u>parise@wsba.org</u>.

200-Word Candidate Statement

I am running for Governor At-Large of the Washington State Bar Association because I believe we are living through a constitutional crisis—one that silences lawyers, denies clients judicial inquiry, and rewards judges for abandoning the rule of law.

I ran for the Washington Supreme Court in 2012 because I saw how homeowners were being stripped of property rights without neutral judicial review. That crisis has only deepened. Today, most lawyers have been forced —by fear or pressure—not to advocate for homeowners at all.

When I recognized that judicial incentives were undermining the independence and neutrality of our courts, I asked the Bar for ethical guidance. They refused. Then they brought sanctions.

The Bar's disciplinary process has become a tool to protect the judiciary—not the people or the profession.

But we were not admitted to serve judges. We were admitted to serve justice.

I will walk by faith—not by sight—but by the light of truth that still shines from our Constitution.

Please read my work at https://nomaduniversity.academia.edu/ScottStafne and https://dutiesofcitizenship.substack.com.

I am not running to fit into this system. I am running to change it.

WASHINGTON STATE BAR ASSOCIATION

Board of Governors – Governor At-Large - Application Form

All Application materials must be received by 5 p.m. PST on Tuesday, April 15, 2025. Late materials will not be accepted.

INSTRUCTIONS

- 1. Review <u>all</u> information regarding board service, the application and the election processes <u>online here</u>.
- 2. Complete this required application form. If you are nominating someone else, ask them to sign it below.
- **3.** Email this signed form and materials to <u>barleaders@wsba.org</u>. Applications must be received by 5 p.m. PST on Tuesday, April 15 2025. Late materials will not be accepted.

Applicant Information	
Name	Christopher Bhang
WSBA Bar #	47427
Email Address	
Phone Number	

Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor At-Large.

Christopher Bhang	47427
Name of Candidate (please print)	WSBA Bar #

Signature of Nominator (if applicable)

Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on February 18, 2025. Filing may be accomplished by emailing the scanned form to <u>barleaders@wsba.org</u>. For questions, please email Manager of Volunteer Engagement Paris Eriksen, at <u>parise@wsba.org</u>.

WSBA Bar #

Candidate Statement, Chris Bhang

My name is Chris Bhang (he/him). I am a proud Japanese and Korean American, and current Governor At-Large. I am a public servant and work for King County Metro leading civil rights programming for all its 6,000 employees and millions of customers and riders. And like many of you, I am a zealous advocate who swore an oath to support the constitutions of the State of Washington and these United States.

During these unprecedented times, the unconstitutional attacks on our profession must be unequivocally condemned as plainly un-American and dangerous. I am proud to have joined with the other Governors to defend the rule of law and to lead with the courage to say that diversity, equity, and inclusion are values that we will not abandon.

As a practiced leader in civil rights, I will continue to work collaboratively and creatively on the BOG towards equitable and legally defeasible outcomes for historically underrepresented and disenfranchised communities.

I would be honored to continue serving on the BOG into 2026, and I hope to hear from many of you with the comments, concerns, questions, and ideas you may have for moving this important work forward. Thank you.

Board of Governors Governor At-Large Position Candidate Profile Form

INSTRUCTIONS

Please complete the below prompts to complete your Candidate Profile form. The information provided in this form will be formatted by WSBA into one pdf. candidate profile document for online WSBA led campaign purposes. This profile form replaces the short biographical statement requirement included in previous application cycles. WSBA may make grammatical and other similar copy edits to be consistent with WSBA's style guide.

Name:	Christopher Takashi Bhang
Bar Number:	47427

Brief Biographical Statement Please tell us a little about you. (50 words max.)

I began my legal career as a solo practitioner providing exclusively low and pro bono immigration services. I currently lead all civil rights programming at King County Metro and imbed DEIA principles in all aspects of my work. I love my family, sci-fi, funk bass, and the game of Go.

What is your understanding of the role of the WSBA Board of Governors and how do you intend to fulfill the role and its obligations? (100 words max.)

The Board of Governors are members and leaders of Washington state's legal community who work collaboratively with WSBA staff to fulfil the Association's mission in service to the public and legal community. This At-Large position holds a special responsibility of advocating for diversity, equity, inclusion, and accessibility in our profession.

I will continue to work cooperatively with my colleagues to promote strategic responses that address the persistent manifestations of racism, misogyny, ablism, xenophobia, transphobia, Native erasure, homophobia, and poverty. As BOG liaison to the Indian Law Section Executive Committee, I will work to meaningfully elevate Native sovereignty in our Association.

Please share an example of how you've demonstrated your understanding and support of the WSBA mission to protect the public and the members of the Washington State Bar Association, to ensure the integrity of the legal profession and to champion justice. (100 words max.)

I devoted my professional career to the public interest. In doing so, I have had the honor to learn from and work alongside many incredible communities to ensure their rights and dignity are upheld and celebrated. From authoring government-wide plans on disability equity and accessibility to combatting hate and bias crimes through community-empowerment, I have used the practice and knowledge of the law to advocate for those most vulnerable and historically marginalized in our society.



Moving forward together

General Manager's Office 201 South Jackson Street Seattle, WA 98104

Washington State Bar Association Board of Governors 1325 Fourth Ave., Suite 600 Seattle, WA 98101-2539

December 20, 2024

Dear WSBA Board of Governors:

I am writing to strongly endorse Chris Bhang for the open DEI At-Large Board of Governors position.

As General Manager for King County Metro, the largest transportation agency in the Puget Sound region, I oversee all aspects of Metro's operations and ensuring that our employees and customers alike are treated with dignity and respect. Mr. Bhang reports directly to me at Metro, and I have worked closely with him on a number of immensely important, sensitive, and wide-ranging equity issues. I have seen firsthand that he is a collaborative leader with a deep commitment to racial justice and equity.

At King County Metro, we are deeply committed to infusing equity in how we deliver regional mobility and in the way we work together. Mr. Bhang has been a driving force behind this work. He created the systems we rely on to assure equal employment opportunity; restructured and built our resources to make reporting accessible; and has worked with agency partners to connect civil rights to equity. He is also implementing an enterprise-wide electronic case management system to understand how employees and riders experience Metro to develop data-informed and equitable policies.

Mr. Bhang has been a trusted partner and an inspirational leader to our organization. He works directly with Metro leadership to implement new ideas – stressing cooperative strategy and mutual learning. Currently, he is leading an agency-wide and multi-year effort to understand and address gender disparities in our workforce's demographic representation and workplace experiences.

In working closely with Mr. Bhang for over 3 years, I have seen firsthand his ability to successfully collaborate and build consensus among our leadership teams to lead transformational policy changes that benefit both our customers and our employees. I know the Board of Governors would greatly benefit from Mr. Bhang's many talents and recommend him highly for this role.

Sincerely,

MÀ

Michelle Allison General Manager

Aline B. Carton-Listfjeld, J.D.

December 17, 2024

WSBA Board of Governors WSBA Diversity, Equity and Inclusion Council barleaders@wsba.org 1325 Fourth Ave, Suite 600 Seattle, WA 98101-2539

Re: Letter of Support for Christopher Bhang, Member At-Large Governor Applicant

Dear Members of the WSBA Board of Governors DEI Council:

As a member of the legal profession for over 20 years, DEI and management consultant, it is my great pleasure and honor to highly recommend Christopher Bhang for the role of Member At-Large for the WSBA Board of Governors.

As someone who has previously served on the WSBA Pro Bono and Legal Aid Committee (now Pro Bono and Public Service Committee), several ATJ Board committees, as well as former WSBA staff who helped launch the Home Foreclosure Legal Aid Project and the Moderate Means Program, I am very familiar with many of the core skills and mindsets needed to successfully collaborate with bar leaders and our diverse professional community across the state to advance equity and justice.

In my capacity as an in-house consultant at King County, for the past year, I have closely partnered with Chris on a large-scale, high-profile public sector organizational health project focusing on creating concrete, measurable improvements for employees who are furthest from access, equity and social justice.

Chris is in many ways uniquely qualified to serve in the Member At-Large position with the Board of Governors. As a civil rights lawyer, a dedicated public servant, and a true leader advancing equity, he has an extensive track record of implementing strategies in large government agencies that center the needs of diverse and underrepresented communities disproportionally impacted by systems of exclusion, discrimination and injustice.

I have witnessed firsthand Chris' ability to successfully lead DEI initiatives within complex institutional networks and systems. This includes balancing legal and political sensitivities, navigating institutional inertia, listening for understanding, collaborating with a variety of interested and affected parties, as well as effectively executing strategic plans. But what really sets Chris apart is his ability to simultaneously build authentic and trusting relationships; and maintain forward momentum, integrity, and transparency. I am humbled and inspired by his commitment to honoring the inherent dignity of all people. In short, he walks the talk.

As a Member At-Large of the WSBA Board of Governors, I am highly confident Chris will be able to bring these skills and experiences to help deliver on WSBA's promise to be more inclusive of underrepresented members and help further advance our profession's mission and commitment to public service and equal justice. Please feel free to contact me if you have any questions.

Sincerely,

Aline Carton-Listfjeld she/her/hers WSBA #37532

UC Irvine Law Fred T. Korematsu Center for Law and Equality



December 19, 2024

WSBA Board of Governors Via email to barleaders@wsba.org

Recommendation of Christopher Bhang for WSBA At-Large Governor

Dear Board of Governors:

I am writing to recommend Christopher Bhang for the vacant At-Large Governor position. He has the experience, skills, and commitment that make him an ideal choice to fill this role that is intended to advance the interests of historically underrepresented members of the bar.

I've known Christopher since he was a student in two of my classes in 2011 and 2012, Social Justice Lawyering and the Civil Rights Clinic at Seattle University School of Law. Grades never tell you the complete story of a person's record or what they will accomplish, but I do remember that he received the highest grade in my Social Justice Lawyering class. In my clinic, he did excellent work on a case in which we represented students in the Tucson Unified School District who challenged an Arizona law that had resulted in the termination of their district's Mexican American Studies Program. He demonstrated the ability to juggle many responsibilities, as he had to meet tight deadlines while teaching full-time as a public school teacher. Even after the class ended, Mr. Bhang remained involved in the case as well as returning a few years after he graduated to volunteer on cases I had in Alaska on behalf of Native Alaskan foster children.

His commitment to protect the rights and to advance the well-being of marginalized individuals and communities was evident to me from the work he did with me. It is also evident throughout his employment history. In his most recent role as Civil Rights and Equal Opportunity Enforcer for King County Metro, he has direct experience working to increase equity, inclusion, belonging, and equal opportunity; including developing programming to develop equitable practices and policies and engagement with constituencies.

Christopher would also bring a different dimension to the WSBA Board, most of whom I believe are in private practice, though some worked previously in government. Christopher is a long time public servant. He brings that important perspective, as well as being able to speak to the needs of WSBA members who are in public service.

All of this leads to where I began-that Christopher Bhang is the ideal choice for this role.

Best regards,

Robert S. Chang Professor of Law and Sylvia Mendez Presidential Chair for Civil Rights Executive Director, Fred T. Korematsu Center for Law and Equality rchang@law.uci.edu

School of Law 401 E. Peltason Dr., Ste. 1000 Irvine, CA 92697-8000 www.law.uci.edu/centers/korematsu





 ♀ 4009 Bridgeport Way W, Suite B University Place, WA 98466
 № [253] 627-3883
 ☑ Info@PalaceLaw.com

April 14, 2025

Re Christopher Bhang:

Dear Members of the Washington State Bar Association,

I am writing to express my enthusiastic support for Christopher Bhang in the upcoming election for the Board of Governors. As a fellow member of the Board, I have had the privilege of witnessing firsthand the contributions Chris has made in his short time on the Board.

Appointed in 2025 as an At-Large member to fill a late-term vacancy, Chris immediately jumped into the fray, demonstrating an unwavering commitment to our mission and values. His proactive approach and dedication have made him an invaluable asset to the Board. Chris has consistently advocated for our members and championed access to justice, ensuring that the voices of all members are heard and respected.

Doing this work takes dedication, time, and investment. Chris has shown a willingness to give all three. I have been involved with WSBA in various capacities for nearly a decade and Chris is one of the people who stands out for his commitment to research the issues and make a concerted effort to learn from everyone he can as he approaches the decision-making process. I am confident that Chris will continue to be a driving force for positive change within the WSBA.

Very truly yours,

Jordan L. Couch At-Large Governor

Diversity, Equity and Inclusion Council Washington State Bar Association 1325 Fourth Ave., Suite 600 Seattle, WA 98101-2539

Via email: barleaders@wsba.org

Dear Colleagues,

I am writing to recommend Chris Bhang for the open DEI At-Large Board of Governors position because he is a collaborative leader with a deep commitment to the work of racial justice and equity, has a strong foundation in the legal framework of anti-racism and brings a proven track record of driving transformation of institutional DEI programs.

At King County Metro we are committed to infusing equity in how we deliver regional mobility and in the way we work together. Chris has been a driving force behind this work. He created the system we rely on to assure equal employment opportunity, restructuring and building our resources to make reporting accessible, and investigations complete and timely. He has guided his team to align recommendations with business processes and leadership structures so they can be digested and implemented by those accountable for improving our culture and outcomes.

Better than anyone I have worked with in this field, Chris collaborates with his colleagues to invite them into creating solutions and supporting their accountability for carrying them out. He has done this by designing space for intentional collaboration, by being very approachable and knowledgeable and by working to align equity with our other values and business goals.

Chris is also an exceptionally talented lawyer with deep knowledge of the history and application of civil rights laws and an exceptional commitment to making the legal system work to address systemic racism and its consequences. He has been a trusted partner and an inspirational leader as our organization has confronted the present challenges to DEI as an anti-racism tool. I work with many talented attorneys who are skilled at negotiating, litigating or legal analysis. But it is rare to find someone like Chris who can bring those legal skills to an institutional environment and also navigate and ultimately transform the systems and traditions that are holding the entity back and causing harm.

I see how Chris works with leaders to help them learn and take action. And I see how he builds consensus to create and modify structures so they become productive for all of our customers and employees. I believe the Board of Governors would also experience Chris in this way. He would help the members to grow. And he would work with others to build pathways to institutional transformation that would help all WSBA members and the clients we serve to thrive.

Very truly yours,

/S/

David J. Eldred, WSBA #26125 Metro Chief Administrative Officer

Tamar Zere, JD Equity, Inclusion, and Belonging Manager for King County Metro



December 18, 2024

Washington State Bar Association 1325 Fourth Avenue, Suite 600 Seattle, WA 98101 <u>barleaders@wsba.org</u> **RE: Letter of Support for Chris Takashi Bhang (Member at Large)**

Dear Board of Governors:

It is my distinct honor to write this letter of support for Chris Takashi Bhang to be considered for WSBA's Board of Governors Member at Large position.

Chris is a true child of the Northwest. Born and bred in Seattle to parents of Korean and Japanese descent, he attended Seattle schools and cut his teeth in social activism advancing the rights of community members impacted by structural oppression. Whether it's in the classroom advancing equity within the education or pushing immigration laws to serve those on margins or rethinking our local civil rights ordinances to live into our racial justice values, Chris is committed to making our region a better place for the forgotten, dispossessed, and often left behind.

Chris and I have been colleagues, friends, and fellow racial equity practitioners for the past 8 years across two organizations. I first met Chris in 2016 when he joined the Seattle Office for Civil Rights (SOCR) as an investigator with the Enforcement Division, while I was leading our citywide racial justice efforts with the Race and Social Justice Initiative. The Seattle Office for Civil Rights is an executive department tasked with providing internal and external community members with Race Equity (Race and Social Justice Initiative), Civil Rights (enforcement of individual civil rights), and Policy. From my earliest conversations with Chris, it was clear that he brought an abiding commitment to making government work better for those who need it the most. Chris came to SOCR with years of teaching experience, and more recent work in immigration law. As an investigator, Chris pushed the Enforcement division to be more transparent, data driven, and racially just. During his time at SOCR, Chris became a student of the Civil Rights movement to better understand how to bridge racial justice work and local individual discrimination laws.

In 2021, I left the City of Seattle to come to King County Metro as their first Equity, Inclusion, and Belonging (EIB) manager. My first call was from Chris – congratulating me and letting me know that he would be joining Metro as the inaugural EEO Officer. I was so excited to work with him again and curious about the ways he had grown since our SOCR days. Right off the bat, Chris was tasked with creating the Coordination Team, comprised of EEO, human resources, labor relations and EIB. Chris was asked to bring us together to review complaints (discrimination and violations of personnel rules and labor

contracts). Chris' leadership was instrumental in the space – we struggled to set aside our egos and devotion to our individual positions to center workers most directly affected by oppression to examine what laws, regulations, and contracts provided the best resolution for aggrieved employees. Chris has been able to grow his team to ADA, enforcement, and coordination services.

Chris and his team continue to push the bounds of our legal obligations, while understanding that Civil Rights laws fall short of addressing structural and system oppression.

To that end, Chris has also been at the forefront of supporting Metro's Gender Equity Initiative. The genesis of this initiative was a 10-year investigative look back into our Vehicle Maintenance Division's pattern of discrimination against women identifying employees. This report has generated a wide array of work through-out Metro aimed at undoing gender bias and discrimination in the workplace. While this work is too nascent to bear fruit, some emerging practices include division led women's Employee Resources Groups, an enterprise-wide Men's group focused on undoing internalized gender bias, and a large-scale study and grounded research to inform the new strategy with next steps.

Partnering with Chris on all our joint efforts at Metro has been game changer for me. His unwavering commitment to racial justice, his ability to listen, push, and compromise in complex situations, and his desire to leave the world better than he found it informs all his work and relationships. Chris will make an excellent Member at Large for WSBA's Board of Governors.

Sincerely,

Tamar Zere

WASHINGTON STATE BAR ASSOCIATION

Board of Governors – Governor At-Large - Application Form

All Application materials must be received by 5 p.m. PST on Tuesday, April 15, 2025. Late materials will not be accepted.

INSTRUCTIONS

- 1. Review all information regarding board service, the application and the election processes online here.
- 2. Complete this required application form. If you are nominating someone else, ask them to sign it below.
- Email this signed form and materials to <u>barleaders@wsba.org</u>. Applications must be received by 5 p.m. PST on Tuesday, April 15 2025. Late materials will not be accepted.

Applicant Information	n	
Name	Uzma Munir Hamid	
WSBA Bar #	47028	
Email Address	uzmahamid@johnlscott.com	
Phone Number	206-617-7425	

Candidate for position on the Washington State Bar Association Board of Governors

I, the undersigned Active member of the Washington State Bar Association, am running for the office of Governor At-Large.

Uzma Munir Hamid	47028
Name of Candidate (please print)	WSBA Bar #

Signature of Nominator (if applicable)

Signature of Candidate

The WSBA values diversity and inclusion, and encourages Black, Indigenous and people of color, women, people from the LBGTQ communities, people with disabilities, and members of other groups who have been systemically oppressed to apply for our committees, boards, and panels. This process is administered by the Office of the Executive Director. Submit the application form and all materials to WSBA no later than 5 p.m. PST on February 18, 2025. Filing may be accomplished by emailing the scanned form to <u>barleaders@wsba.org</u>. For questions, please email Manager of Volunteer Engagement Paris Eriksen, at <u>parise@wsba.org</u>.

WSBA Bar #

WSBA BOG Candidate Statement

I am pleased to seek a position on the Board of Governors of our Bar Association. As a woman of color with a diverse skill set and ability to problem solve creatively, I bring not only professional expertise but a lived perspective that reflects the evolving and diverse community that WSBA seeks to serve.

I am licensed to practice law in three jurisdictions across three continents, including Washington State (USA), England & Wales (UK) and Punjab (Pakistan). Throughout my career, which is made up of over six years of corporate law practice, seven years of real estate practice, about ten years of volunteer work and three years of teaching, I have worked to increase awareness of issues, support communities and my colleagues particularly those from historically marginalized backgrounds - and promote ethics. I align with WSBA's mission and would be honored to share my expertise to help advance it.

As a governor, I will advocate for meaningful representation, responsive member services, and policies that serve all corners of our state, from legal professionals to our urban and rural communities. I am proud to be a part of this profession and would be happy to help it grow more just, accessible, and reflective of the people we serve. To that end, I respectfully ask for your vote and the opportunity to serve.

WASHINGTON STATE BAR ASSOCIATION

Board of Governors Governor At-Large Position Candidate Profile Form

INSTRUCTIONS

Please complete the below prompts to complete your Candidate Profile form. The information provided in this form will be formatted by WSBA into one pdf. candidate profile document for online WSBA led campaign purposes. This profile form replaces the short biographical statement requirement included in previous application cycles. WSBA may make grammatical and other similar copy edits to be consistent with WSBA's style guide.

Name:	Uzma Munir Hamid
Bar Number:	47028

Brief Biographical Statement Please tell us a little about you. (50 words max.)

I am an attorney licensed to practice law in Washington State (USA), England & Wales (UK), and Punjab (Pakistan). I have over six years of experience as a corporate attorney. I made a switch from practicing law to selling real estate seven years ago, though I maintain all my licenses. I am an educator at heart, and love teaching and sharing whenever I can. I volunteer my time and resources as well because I feel sharing makes the world a better place.

What is your understanding of the role of the WSBA Board of Governors and how do you intend to fulfill the role and its obligations? (100 words max.)

I would like to start with the mission of our Bar: to serve the public and its members, to ensure integrity of our profession and to champion justice. WSBA accomplishes that with different committees, councils, associations, and the Board is at the heart of it all. A Governor is essentially a liaison facilitating the flow of information so issues are highlighted, and solution can be formulated. I feel I am a good candidate because of my diverse experience and background, the rich perspective that I bring to the table, and the hardships that I have lived through as a minority in this profession, and as an individual.

Please share an example of how you've demonstrated your understanding and support of the WSBA mission to protect the public and the members of the Washington State Bar Association, to ensure the integrity of the legal profession and to champion justice. (100 words max.)

After moving to the US, and passing the Washington State Bar, I was faced with a host of challenges trying to find a position as a lateral attorney, because my experience and education were foreign. After years of realizing the hard truth, that I will need to switch gears and change my practice, from corporate to, may be, family or immigration (which were not areas of interest), I had a choice in front of me: to give up on my legal profession (or do it half-heartedly), or to make something of it. I ended up changing my career from practicing law to selling real estate, but continued to maintain my bond with the legal profession as a volunteer. That is a capacity which I can work in whole-heartedly. I maintain my licenses just so I can help someone in need whenever a situation arises. The legal profession does not pay my bills, but I serve the public and my profession every once in a while.