WASHINGTON STATE
BAR ASSOCIATION

BOARD OF GOVERNORS MEETING

September 26-27, 2025

Meeting Materials

WSBA Conference Center
Seattle, WA

Board of Governors Meeting
WSBA Conference Center, Seattle, WA
September 26-27, 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, September 26th : Meeting ID: 859 5455 9133 Passcode: 050089
https://wsba.zoom.us/j/85954559133?pwd=cyhl4JlZE4GQNkAc25ryk1mb1dtZBT.1

Saturday, September 27th : Meeting ID: 825 7701 2879 Passcode: 314459
https://wsba.zoom.us/j/82577012879?pwd=UQGnaFiqbHtMXJjhzmny2vxgPOQB0w.1

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

FRIDAY, SEPTEMBER 26, 2025

9:00 AM – CALL TO ORDER & WELCOME

☐ **WELCOME & CALL TO ORDER**

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.

CONSENT CALENDAR

☐ **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 July 18, 2025, Board of Governors Meeting Minutes 6
- Approve Client Protection Board Gift Recommendations 12

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.

- Approve Sending a Proposed Amendment to GR 12.4 Re Records Exempt from Public Access to the Washington Supreme Court 13
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- Accept Presidential Appointments to the Oath Review and Drafting Task Force 49

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☐ **EXECUTIVE DIRECTOR'S REPORT** 93

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☐ **FY26 BUDGET: FINAL DRAFT**, Treasurer Kari Petrasek, Director of Finance Tiffany Lynch 105

☐ **BOG RESERVE FUND RECOMMENDATIONS**, Director of Finance Tiffany Lynch 256

☐ **FINAL REPORT OF THE LEGAL TECH TASK FORCE**, Jenny Durkan, Task Force Chair; Craig Shank, Ad Hoc Member; Practice Management Advisor Margeaux Green; and Advancement Department Director Kevin Plachy 257

☐ **PROPOSED CHANGES TO THE LEGISLATIVE AND COURT RULE COMMENT POLICY**, Gov. Kevin Fay, BOG Legislative Committee Chair; Legislative Affairs Manager Sanjay Walvekar 304

SPECIAL REPORTS

☐ **COUNCIL ON PUBLIC DEFENSE UPDATE ON IMPLEMENTATION OF THE WSBA STANDARDS FOR INDIGENT DEFENSE SERVICES**, Jason Schwarz, Immediate Past Chair, Council on Public Defense

12:00 PM – RECESS FOR LUNCH

SPECIAL REPORTS CONTINUED

☐ **CLIENT PROTECTION BOARD ANNUAL REPORT**, Efrem Krisher, Client Protection Board Chair; Nicole Gustine, Client Protection Board Counsel/Secretary; Brenda Jackson, Client Protection Board Specialist 309

☐ **UPDATE ON IMPLEMENTATION OF THE PATHWAYS TO LICENSURE,** Professor Zaida Rivera, Licensure Pathways Implementation Steering Committee Chair 518

WASHINGTON STATE BAR FOUNDATION ANNUAL MEETING

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☐ **APPROVE FY26 TRUSTEE APPOINTMENTS**, WSBF President Brian Anderson 331

☐ **APPROVE PROPOSED CHANGES TO THE WSBF BYLAWS**, WSBF President Brian Anderson 333

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☐ **LAW CLERK BOARD SUGGESTED AMENDMENTS TO APR 6 AND RELATED REGULATIONS**, Incoming Chair Christell Casey and Law Clerk Program Lead Katherine Skinner 343

☐ **LAW CLERK BOARD ADDITIONAL SUGGESTED AMENDMENTS TO PROGRAM REGULATIONS**, Incoming Chair Christell Casey and Law Clerk Program Lead Katherine Skinner 369

SWEARING IN OF OFFICERS AND GOVERNORS

☐ **SWEARING IN OF FY26 GOVERNORS AND OFFICERS,** Justice Mary Yu

4:45 PM – RECESS

SATURDAY, SEPTEMBER 27, 2025

9:00 AM – RESUME MEETING

EXECUTIVE SESSION

☐ **EXECUTIVE DIRECTOR EVALUATION** 523

☐ **RECEIVE AND DISCUSS LEGAL ADVICE RE 2026 KELLER DEDUCTION**

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☐ **2026 KELLER DEDUCTION**, General Counsel Laurie Powers, Director of Finance Tiffany Lynch

☐ **PRESENTATION RE NEW GR 12.2,** Alec Stephens 524

☐ **FY26-29 STRATEGIC PLAN**, President-Elect Francis Adewale and Executive Director Terra Nevitt..... 546

GOVERNOR ROUNDTABLE

☐ **GOVERNOR ROUNDTABLE**

MEETING FEEDBACK

☐ **MEETING FEEDBACK**

12:00 PM – ADJOURN

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- Committee on Professional Ethics New Advisory Opinion Re Use of a Non-Practicing Lawyer's Name in Firm Name by the Purchaser of a Law Practice 393
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WASHINGTON STATE
BAR ASSOCIATION

BOARD OF GOVERNORS MEETING MINUTES

Walla Walla, WA

July 18, 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, July 18, at 10:40 a.m. Governors in attendance were:

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

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

Also in attendance were Alec Stephens, Nancy Hawkins, Rex Nolte, Aziza Ozgoren, Jennifer Olegario, Brent Williams-Ruth, Catherine Schur, Lesli Ashley, Julianne Unite, Nicole Chen, Noah Baetge, Sanjay Walvekar, Chelle Gegax, Carl Snodgrass, Michelle Mendoza, Riley Gavigan, Alex Reaganson, Breean Beggs, Mason Ji, and Janta Steele.

President's Report (link)

President Anjilvel opened with a moment of silence honoring retired Washington Supreme Court Justice Charles Wiggins and his contributions to the bench and legal community.

Public Comment (link)

Brent Williams-Ruth raised the idea of a legislatively-created pooled insurance program for small firms and licensed professionals, noting the disparity in coverage access for firms with fewer than 100 employees. Governors and guests suggested engaging the Solo and Small Practice Section and exploring inclusion of legal aid organizations. Director Plachy reported that the Member Engagement Council will discuss insurance options at its next meeting. Members of the Board raised concerns about data requirements and complexity, and a recommendation for expert analysis was noted.

Executive Director's Report (link)

Executive Director Nevitt referred to her written report and introduced Chief Communications and Outreach Officer Niegowski to provide an update on the Rule of Law Ambassador Program. Highlights included a statewide Law Day event, a constitutional law CLE with over 2,000 participants, and upcoming speaker series and resources aimed at promoting civil dialogue and countering misinformation. Gov. Ahearne emphasized the importance of ensuring the program aligns with WSBA's mission. General Counsel Powers briefed the Board on the amicus brief that will be filed in Perkins Coie LLP v. U.S. Department of Justice, advising that the appeal is pending and a briefing schedule will be set shortly.

Consent Calendar (link)

President Anjilvel presented the consent calendar with an invitation for the board members to request discussion of any items as needed. Gov. Petrasek moved to approve the consent calendar. The motion passed unanimously.

Budget and Audit Committee Items (link)

First Draft of FY26 Budget

Treas. Kari Petrasek made an opening statement, and Director of Finance Tiffany Lynch presented the first draft of the FY26 budget. The draft anticipates a net loss of approximately $1.5 million, similar to the FY25 budget, however there are changes in the amount of designated reserves used for special projects and facilities. Key changes to expenses include a 2% increase in salaries, a reduction in retirement contribution rates, and increased IT costs for a new association management system. The primary change in revenue is an increase to license fees from the $10 increase to the full active fee effective January 1, 2026. Director Lynch addressed questions asked by Board members and noted that the final version of the budget would be presented in September with further changes that will reduce the budgeted net loss.

License Fee Policy

Director Lynch highlighted the changes from the prior draft which include that the proposal's name has changed from "philosophy" to "policy" and explained adjustments in language regarding fee growth. Gov. Nam Nguyen moved to approve the second reading of the License Fee Policy as presented. The motion passed unanimously. Gov. Kevin Fay was not present for the vote.

Proposed Amendments to the WSBA Facilities Advisory Subcommittee Charter

Director Lynch introduced recommendations to allocate $150,000 annually to the facilities reserve and the proposed changes to the Facilities Advisory Subcommittee charter, including timelines for recommendations related to leases and real estate purchases. Nancy Hawkins suggested revision of the conflict-of-interest policy to include personal and professional associates of committee members to ensure independent advice. Gov. Nguyen moved to approve the amended Facilities Advisory Subcommittee charter. The motion passed unanimously. Gov. Alain Villeneuve was not present for the vote.

License Fee Exemption Based on Financial Need (link)

Executive Director Nevitt introduced the first reading of a proposal to permit license fee exemptions for members demonstrating financial need, a topic previously discussed during four Board meetings. Gov. Jordan Couch moved to add the proposal to the consent calendar for the September meeting. There was a brief discussion about whether it is appropriate to amend the bylaws via the consent calendar. The motion passed unanimously.

Interview and Selection of FY26 Treasurer (link)

Executive Director Nevitt explained the election process. Gov. Nguyen and Gov. Villeneuve each presented their qualifications and priorities for the Treasurer role. Both candidates addressed questions posed by Board members. Ballots were collected and counted by Executive Director Nevitt with assistance from Alec Stephens and Director Niegowski. President Anjilvel announced that Gov. Nguyen was elected as WSBA FY26 Treasurer. The Board expressed appreciation for both candidates' willingness to serve.

Proposed Fees for Entity Regulation Pilot Project (link)

Chief Regulatory Counsel Renata Garcia and Chair of the Practice of Law Board Lesli Ashley presented the proposed fee structure for Washington's Entity Regulation Pilot Project. The proposal included a tiered fee model with application fees of $2,000 for general entities and $1,000 for access to justice-focused entities, and annual participation fees of $5,000 and $2,500, respectively. The fees aim to maintain revenue neutrality and ensure accessibility, particularly for entities serving low-income populations. The Board discussed the criteria for determining which entities are access-to-justice focused, the feasibility of basing fees on entity income, and the potential for the pilot project to attract a significant number of applications. Concerns were raised about the adequacy of staffing and budget projections. Gov. Fay moved to approve the fees as outlined, with proration and refundability to be addressed later. The motion passed 12 to 1 with Gov. Couch abstaining. Gov. Kristina Larry was not present for the vote.

Recommendation from Member Engagement Council to Change WSBA Fiscal Policy to Allow Purchase of Alcohol with Section Funds (link)

Gov. Matthew Dresden presented a recommendation from the Member Engagement Council regarding a change in WSBA fiscal policy to allow the purchase of alcohol with section funds, highlighting that a majority of section leaders support reverting to the pre-2016 policy, which permitted sections to use section-collected funds for alcohol purchases. The proposal had been unanimously approved by the Member Engagement Council and the Budget and Audit Committee. Some Board members raised

concerns about the potential legal and financial risks associated with the policy change, with some governors requesting a discussion in executive session to receive and discuss legal advice. Gov. Emily Arneson moved to table the vote until after executive session. The motion passed 12 to 1 with one abstention. Gov. Larry was not present for the vote.

Washington Young Lawyer Committee (WYLC) Proposed Bylaw Amendment to Young Lawyer Title and Definition (link)

WYLC Chair-Elect Alex Reaganson, Chair Mason Ji, and Member Janta Steele presented recommended amendments to the WYLC bylaws. The amendments would change the term "young lawyer" to "new "member," eliminate age restrictions, include any member within their first 10 years of licensure in Washington State, and include LLLT and LPO members. This initiative, driven by a five-year effort to enhance inclusivity and diversity, was supported by survey data and comparisons with other jurisdictions. The Board engaged in a robust discussion, addressing the benefits of expanding access to programs and services and potential impact of broader inclusion on member dues. Gov. Couch moved to approve the amendments. The motion passed unanimously. Gov. Larry was not present for the vote.

Executive Session (link)

At 3:38 p.m., the Board entered executive session under WSBA Bylaw VII.B.7.a.1-6 to receive legal advice on the revised legislative and rulemaking comment policy and on the Member Engagement Council's fiscal policy recommendation regarding section funds for alcohol. The session ended at 4:15 p.m., and the Board returned to public session at 4:18 p.m.

Upon resumption, Gov. Parvin Price moved to approve the recommendation from the Member Engagement Council to change WSBA Fiscal Policy to allow purchase of alcohol with section funds. The motion passed 10 to 4. Gov. Larry was not present for the vote.

Review Revised Legislation and Rulemaking Comment Policy (link)

Nancy Hawkins, as liaison from the family law section, expressed concerns about requiring uniform section positions when sections may hold divergent views, and about Supreme Court boards not being subject to the same restrictions. She urged direct engagement with the Court to harmonize policies. The policy will return to the Board for second reading.

Governor Roundtable and Meeting Feedback (link)

During the Governor's Roundtable, President Anjilvel expressed gratitude to the Board for their dedication and cohesiveness. Gov. Arneson welcomed the Board to Walla Walla, sharing personal ties to the area. She suggested to the Governance Committee consider a 12-month limit between first and second readings of proposals, citing the Young Lawyers agenda item as an example of a long interval between readings. Alec Stephens suggested that documentation supporting proposed policy changes clarify how the Board's action will align with the organization's mission. Gov. Rathbone and Gov. Couch discussed the importance of innovative thinking and engaging youth in the legal profession, sharing a successful outreach initiative. Gov. Couch shared survey results on public representation on the Board of Governors, indicating mixed opinions and suggesting alternative methods for public engagement.

ADJOURNMENT

There being no further business, President Anjilvel adjourned the meeting at 4:42 p.m. on Friday, July 18, 2025.

Respectfully submitted,

_____

Terra Nevitt
WSBA Executive Director & Secretary

DRAFT

Board of Governors Meeting – Motions List
Walla Walla, WA
July 18, 2025

1. Approve the consent calendar. Passed unanimously.
2. Approve the second reading of the License Fee Policy. Passed unanimously.
3. Approve amendments to the Facilities Advisory Subcommittee Charter. Passed unanimously.
4. Add the license fee exemption proposal to the September consent calendar. Passed unanimously.
5. Approve proposed fees for the entity regulation pilot project. Passed 12 to 1 with one abstention.
6. Table action on the fiscal policy permitting purchase of alcohol with section funds until after executive session. Passed 12 to 1 with one abstention.
7. Approve WYLC bylaw amendments. Passed unanimously.
8. Approve the Member Engagement Council recommendation permitting sections to use funds for alcohol purchases. Passed 10 to 4.

DRAFT

WASHINGTON STATE
BAR ASSOCIATION

Office of General Counsel
Nicole Gustine, Assistant General Counsel

TO: WSBA Board of Governors

FROM: Nicole Gustine, Assistant General Counsel

DATE: August 8, 2025

RE: Confidentiality of Client Protection Board Recommendations

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The Board of Governors (BOG) is responsible for approving gifts from the Client Protection Board. Per Court Rule, all the materials, reports, and deliberations shall not be public. (APR 15 Procedural Regulations, Regulation 13(b)). As such, the recommendations are placed on the Consent Calendar. If discussion is requested by any Governor, it shall be taken up in Executive Session.

> **APR 15**
> **CLIENT PROTECTION FUND PROCEDURAL REGULATIONS**
> **REGULATION 13. CONFIDENTIALITY**
>
> (a) Matters Which Are Public. On approved applications, the facts and circumstances which generated the loss, the Client Protection Board's recommendations to the Trustees with respect to payment of a claim, the amount of claim, the amount of loss as determined by the Client Protection Board, the name of the lawyer, LLLT, or LPO causing the loss, and the amount of payment authorized and made, shall be public.
>
> (b) Matters Which Are Not Public. The Client Protection Board's file, including the application and response, supporting documentation, and staff investigative report, and deliberations of any application; the name of the applicant, unless the applicant consents; and the name of the lawyer, LLLT, or LPO unless the lawyer, LLLT, or LPO consents or unless the lawyer's, LLLT's, or LPO's name is made public pursuant to these rules and regulations, shall not be public.

The following report of CPB recommendations contains only pre-approved applications, and is therefore provided to you as a Trustee, confidentially. The report will not appear in the BOG meeting's public session materials. Please take the time to review the materials thoroughly prior to the BOG public session meeting.

Pursuant to ELC 3.4(l), the Chief Disciplinary Counsel has authorized the release of otherwise confidential disciplinary information to the Board of Governors for the purpose of reviewing and deciding on Client Protection Fund Board recommendations. The Board of Governors is advised of its obligation to maintain the confidentiality of these materials.

Please do not discuss any details regarding the matters, including the names or amounts related to the matter, at the public session meeting.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Catherine Biestek, Managing Regulatory Counsel
Laurie Powers, General Counsel

DATE: August 26, 2025

RE: Proposed Amendment to GR 12.4

ACTION: Approve proposed amendment to GR 12.4(d)(2)(b)(2) as recommend by WSBA's Regulatory Services Department and the Office of General Counsel.

Rule 12.4(d)(2)(b)(2) of the General Rules (GR) lists certain Bar records that are exempt from public access, including "application, investigation, and hearing or proceeding records relating to lawyer, Limited Practice Officer, or Limited License Legal Technician admissions, licensing or discipline …." The Office of General Counsel (OGC) and the Regulatory Services Department (RSD) of the Washington State Bar Association (WSBA) propose adding "licensed legal intern" in order to clarify that records described in this rule section relating to licensed legal interns also are exempt from public access.

Licensed legal interns are authorized by the Court to engage in the limited practice of law in accordance with Rule 9 of the Admission and Practice Rules (APR). Individuals apply for an APR 9 intern license under the APR. APR 1(d) makes applications for APR 9 licensed legal interns confidential, but currently no rule expressly provides for the confidentiality of records regarding complaints and investigations into the conduct of licensed legal interns. This apparent oversight is addressed by the proposed amendment to GR 12.4.

Therefore, we ask the BOG to approve the proposed amendment to GR 12.4 and direct staff to submit the suggested amendment to the Washington Supreme Court for consideration.

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 is included in 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 amendment is limited to the amount of staff time used to draft proposed language, incorporate the approved changes to relevant records, and communication of changes to stakeholders. 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 analyses is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all. Based on our review, there do not appear to be any concerns about inequitable outcomes as the proposed amendment is designed to address an apparent oversight and apply the exemption from public access to all licensed legal professionals.

Attachments

- Mark-Up Copy of proposed amendment to GR 12.4
- Clean Copy – with proposed amendment to GR 12.4

GR 12.4
WASHINGTON STATE BAR ASSOCIATION ACCESS TO RECORDS

(a)-(c) [Unchanged.]

(d) Bar Records – Right of Access.

(1) [Unchanged.]

(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. [Unchanged.]

b. Specific information and records regarding

1) [Unchanged];

2) application, investigation, and hearing or proceeding records relating to lawyer, licensed legal intern, 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

3) [Unchanged.]

c. – f. [Unchanged.]

(3) [Unchanged.]

(e)-(j) [Unchanged.]

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 LLT Rules of Professional Conduct, the LPO Rules of Professional Conduct, the Rules for Enforcement of Lawyer Conduct, the Admission and Practice Rules and associated regulations, the Rules for Enforcement of Limited Practice Officer Conduct, the Rules for Enforcement of Limited License Legal Technician Conduct, GR 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

1) 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;

2) application, investigation, and hearing or proceeding records relating to lawyer, licensed legal intern, Limited Practice Officer, or Limited License Legal Technician admission, 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

3) 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 their 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 their 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.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: WSBA Budget and Audit Committee

DATE: August 12, 2025

RE: Amendments to WSBA Bylaws re License Fee Exemption Based on Financial Need

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CONSENT: Approve amendments to the WSBA Bylaws relating to the hardship exemption for payment of active license fees and assessments.

Background

At the March 21-22, 2025 meeting, the Board of Governors reviewed a proposal to expand the license fee hardship exemption and provided feedback regarding the title and description of the exemption, emphasizing the need for inclusivity and understanding of diverse financial situations among members and the stigma surrounding different titles.

At its May 19, 2025 meeting, the Budget and Audit Committee reviewed recommendations provided by Governor At-Large Jordan Couch and Chief Regulatory Counsel Renata Garcia and unanimously approved them to be moved forward to the Board of Governors.

The proposed amendments to the WSBA Bylaws to effectuate the recommendations of the Budget and Audit Committee were presented as a first read agenda item and discussed at the Board of Governors meeting on July 17-18, 2025. The proposal is to amend the WSBA Bylaws relating to the hardship exemption for payment of active license fees and assessments as follows:

1. Increase the number of times a member is eligible for the exemption from two to three.
2. Raise the eligibility threshold from 200% of the federal poverty level to 270% of the federal poverty level.
3. Change the name from *Hardship Exemption* to *License Fee and Assessment Exemption Based on Financial Need*.

Prior memoranda detailing the recommendations and proposed amendments are attached.

Attachments

1. Memorandum to the Board of Governors dated May 20, 2025, with attachments

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors

From: Budget and Audit Committee

Subject: License Fee Exemption Based on Financial Need

Date: May 20, 2025

FIRST READ: Proposed amendments to WSBA Bylaws relating to the hardship exemption for payment of license fees.

BACKGROUND:
At the March 21-22, 2025 meeting, the Board of Governors reviewed a proposal to expand the license fee hardship exemption and provided feedback regarding the title and description of the exemption, emphasizing the need for inclusivity and understanding of diverse financial situations among members and the stigma surrounding different titles.

At its May 19, 2025 meeting, the Budget and Audit Committee reviewed recommendations provided by Governor At-Large Jordan Couch and Chief Regulatory Counsel Renata Garcia (see *attachment A)* and unanimously approved them to be moved forward to the Board of Governors. The proposal is to amend the WSBA Bylaws relating to the hardship exemption for payment of active license fees as follows:

1. Increase the number of times a member is eligible for the hardship exemption from two to three.
2. Raise the eligibility threshold from 200% of the federal poverty level to 270% of the federal poverty level.
3. Change the name from *Hardship Exemption* to *License Fee and Assessment Exemption Based on Financial Need*.

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

The legal risk analysis is in the BOG's 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 of the proposal is provided in Attachment A under the "Fiscal Analysis" section.

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 analyses is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all. The people most impacted by this proposed

policy appear to be the licensed legal professionals who have financial need (and relatedly, the clients they would serve as long as they're able to remain licensed). The proposed changes center legal professionals with financial need by broadening the policy's application and make eligibility more inclusive. Based on our review, there do not appear to be concerns about inequitable outcomes.

ATTACHMENTS:

Attachment A: License Fee Exemption Based on Financial Need Memo from April 28, 2025
Attachment 1: Recommended Amendments to WSBA Bylaws- Markup Version
Attachment 2: Recommended Amendments to WSBA Bylaws- Clean Version

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Jordan Couch, Governor At-Large
Renata Garcia, Chief Regulatory Counsel

DATE: April 28, 2025

RE: License Fee Exemption Based on Financial Need

ACTION: Recommend to the Board of Governors amending the WSBA Bylaws relating to the hardship exemption for payment of active license fees. The recommendation is to increase the number of times a member is eligible for the hardship exemption from two to three, raise the eligibility threshold from 200% of the federal poverty level to 270% of the federal poverty level, and change the name to License Fee and Assessment Exemption Based on Financial Need.

Recommended Amendments

Currently, active members who have a household income at or below 200% of the federal poverty level are eligible to claim a license fee hardship exemption. If granted, the member is exempt from paying the active license fee and client protection fund (CPF) assessment. The member is permitted to receive the exemption only twice during the member's lifetime. The recommendations before the committee are to (1) increase the income eligibility threshold to 270% of the federal poverty level, (2) allow an active member to claim the exemption up to three times, and (3) change the name of the exemption to License Fee and Assessment Exemption Based on Financial Need, which more accurately describes the purpose for the exemption than does "hardship exemption".

ALICE Threshold

The purpose of the proposed recommendations is to better support active members who are living in effective poverty, that is members who are living at or below a household income level known as the ALICE threshold. ALICE is an acronym for Asset Limited, Income Constrained, Employed, and represents families who are unable to afford the basics of housing, child care, food, transportation, health care, and technology.[1]

Financial Analysis

The amount of license fees that have been exempted due to past exemptions is illustrated in the table below. The exemption limit increased to two times in 2021; 129 of the 237 exemptions in 2021 represent members using the exemption for the second time.

Year	Exemptions	License Fees
2025	67	$ 27,480.00
2024	89	$ 38,243.00
2023	83	$ 36,754.50
2022	74	$ 31,373.00
2021	237	$ 100,760.00

[1] ALICE information, reports, and income levels are available online at https://www.unitedforalice.org/.

2020	43	$ 17,404.00
2019	71	$ 28,965.50
2018	95	$ 37,940.50

We anticipate that there will be a substantial increase in 2026 (as there was in 2021) due to both the higher income threshold and allowing the exemption up to three times. In subsequent years, the number of exemptions will remain higher than prior years because of the higher income threshold.

If, for example, there were 300 exemptions in 2026, the impact on license fees would be approximately $140,400; which represents about $4.20 to be absorbed by each lawyer member paying the full active license fee.[2]

Attachments

1. Recommended Amendments to WSBA Bylaws – Markup Version
2. Recommended Amendments to WSBA Bylaws – Clean Version

[2] This calculation is based on a license fee of $468 and 33,132 active lawyer members paying the full license fee. 33,432 – 300 = 33,132. $140,400/33,132 = $4.23. Lawyer members paying a discounted license fee would absorb a prorated amount.

Budget and Audit Committee Recommended Amendments to WSBA Bylaws

WSBA Bylaws Art. III Sec. I.5. (page 15 of WSBA Bylaws)

5. License Fee and Assessment Exemption Based on Financial Need ~~s Due to Hardship~~

~~In case of proven extreme financial hardship, which must entail~~ An active member with a~~n current~~ annual household income equal to or less than ~~200%~~ 270% of the federal poverty level as determined based on the member's household income for the calendar year immediately preceding the calendar year for which the member is seeking to be exempted from license fees~~, the Executive Director~~ may be granted an exemption from payment of annual license fees and assessments by the Executive Director ~~any Active member~~. ~~Hardship e~~ Exemptions are for one licensing period only, and a request must be submitted on or before February 1st of the year for which the exemption is requested. Denial of an exemption request is not appealable. A member may be granted ~~a hardship~~ an exemption a maximum ~~of t~~wo three times, on the basis of separate exemption requests, and the exemptions may be granted for consecutive or non-consecutive calendar years.

Budget and Audit Committee Recommended Amendments to WSBA Bylaws

WSBA Bylaws Art. III Sec. I.5. (page 15 of WSBA Bylaws)

5. License Fee and Assessment Exemption Based on Financial Need

An active member with an annual household income equal to or less than 270% of the federal poverty level as determined based on the member's household income for the calendar year immediately preceding the calendar year for which the member is seeking to be exempted from license fees, may be granted an exemption from payment of annual license fees and assessments by the Executive Director. Exemptions are for one licensing period only, and a request must be submitted on or before February 1st of the year for which the exemption is requested. Denial of an exemption request is not appealable. A member may be granted an exemption a maximum of three times, on the basis of separate exemption requests, and the exemptions may be granted for consecutive or non-consecutive calendar years.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Greggory Busch, Secretary-Treasurer, Indian Law Section

DATE: August 24, 2025

RE: Proposed Amendments to Indian Law Section Bylaws

ACTION: Approve Indian Law Section Bylaws Amendments

The proposed document amending the Indian Law Section bylaws address the following issues:

- Allowing inactive members of the WSBA to participate and vote in the Indian Law Section. The Indian Law Section holds deep respect for our Section members who are willing to contribute their knowledge and experience to the betterment of the community, despite no longer being active members of the WSBA. As such, the Executive Committee proposes to allow said inactive members to enroll, pay dues, and vote in the Section's elections. Inactive members will still not be able to serve on the Executive Committee or hold Section office, as is currently the case.
- Conflict between Indian Law Section bylaws and actual practice of the timing of the Section's Annual Meeting. Section 3.1 of the bylaws requires the Section's annual meeting to take place at the Indian Law Section CLE. However, the Section has historically held the annual meeting at the University of Washington Indian Law Symposium for several reasons, including that the Symposium occurs at the start of the new fiscal year, which allows new officers to be introduced to the Section in person. Further, the amended bylaws allow the meeting to be moved to a different date if needed.
- Elimination of Budget Committee from bylaws to comport with Section practice. It is the Section's practice to have the entirety of the Executive Committee review and vote on the annual budget. No Budget Committee has been formed in recent memory, and the Executive Committee has therefore decided to eliminate the Budget Committee requirement from the bylaws.
- Typographical errors and drafting improvements. Bylaws section numbering and grammatical errors have been corrected in the proposed amendment. Defined terms have been properly capitalized and used throughout.

Background

The Board of Governors last approved amendments to the section's bylaws on November 16, 2017. The BOG's authority and responsibility to approve proposed section bylaws once approved by the section is found in Article XI.E of the WSBA Bylaws.

Community Input

The executive committee of the section first publicly proposed to review the section's bylaws at the Section's annual meeting in 2024 at the University of Washington Indian Law Symposium. A subcommittee of the section conducted a review of the bylaws, and several revisions were reviewed at multiple Section meetings, with

feedback from the WSBA General Counsel's office being provided directly at the August 19, 2025 Executive Committee meeting. The proposed final Section bylaw amendment document was approved unanimously by the Executive Committee at its August 19, 2025 meeting.

The participation details for every executive committee meeting, with the agenda, are posted to the section's webpage. All section members are invited to provide their feedback through the section listserv, by contacting any member of the executive committee directly, or by attending any executive committee meeting, which are held virtually via Microsoft Teams.

Information for Fiscal Analysis

The Section does not anticipate any meaningful fiscal impact from the proposed amendment. While there may be a number of inactive members of the WSBA who will now be able to join the Section and pay dues, this is not expected to provide revenue to the degree that such revenues would affect the Section's top-level budget.

Information for Equity Analysis

The proposed amendment to the Indian Law Section bylaws enhance the section's ability to retain institutional knowledge, thereby improving the ability of future generations of Section members to draw upon the experience of inactive members of WSBA. Clarification of Section bylaws and revising Section bylaws to comport with Section practice will improve transparency in the Section and improve the ability of future Executive Committee members to conduct business and support Indian Law in Washington.

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

The risk analysis is included in the BOG's confidential materials.

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

The proposed amendments have a fiscal impact to the Section's revenue and expense, as well as the WSBA's General Fund indirect expenses. In terms of fiscal impact to the Section, the proposed amendments could generate a minimal amount of additional dues revenue based on the number of additional inactive members who would pay the current annual dues rate of $30. The Section will also incur additional expense for the WSBA Per-Member Charge (PMC), a fee that covers administrative support provided by WSBA. The PMC is currently set at $18.75 for FY25. The fiscal impact on the WSBA General Fund includes allocation of existing indirect expenses for staff time used to draft and incorporate the changes to WSBA records and outreach to communicate changes to stakeholders. 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 analyses is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all. Based on our review, there do not appear to be any concerns about inequitable outcomes as the section sought regular

input from members who could be potentially impacted and including inactive members will facilitate a more inclusive engagement of legal professionals.

Attachments

- Clean copy of proposed Indian Law Section bylaws, as amended
- Redlined version of proposed Indian Law Section bylaws, as amended

WASHINGTON STATE
BAR ASSOCIATION
INDIAN LAW SECTION BYLAWS

as amended and approved by
the WSBA Indian Law Section on August 19, 2025,
and the WSBA Board of Governors on _____, 2025.

ARTICLE 1. Identification

1.1 **Creation.** The Indian Law Section ("Section") of the Washington State Bar Association ("Bar") is established pursuant to the Bar's Bylaws.

1.2 **Jurisdiction.** The jurisdiction of the Section shall be all aspects of Indian Law.

1.3 **Purpose.** The purpose of the Section shall be to seek the participation of all interested members of the Bar, and of county and local bar associations, in order to benefit such members, their clients, and the general public. In conformity with the Bar's Bylaws, the Section shall pursue this purpose by:

(a) providing the opportunity for exchange of ideas in Indian law, to further the development of Indian law, to foster the development of potential practitioners thereof, to communicate useful information concerning Indian law to members of the Bar; and to improve the application of justice in Indian law;

(b) initiating and implementing common projects;

(c) reviewing pending legislation and development of proposed statutory enactments to improve and to facilitate the administration of justice in Indian law; and

(d) undertaking such other services as may benefit members of the Bar, the legal profession, and the public.

1.4 **Limitations.** These bylaws have been adopted subject to the applicable Washington Rules of Court and the Bylaws of the Bar.

1.5 **Office.** The principal office of the Section shall be the offices of the Bar.

1.6 **Fiscal Year.** The fiscal year of the Section shall coincide with that of the Bar.

ARTICLE 2. Membership

2.1 **Enrollment.** Any active or inactive member in good standing of the Bar may be enrolled as a voting member of the Section upon request and payment of annual Section dues in the amount and for the purpose approved by the Board of Governors of the Bar. In accordance with the Bylaws of the Bar, law students may be enrolled as non-voting

members ("subscribers") of the Section. Subscribers and inactive members of the Bar may not hold a Section office or serve on the Section's Executive Committee.

2.2 **The Membership.** Members enrolled as provided in Section 2.1 shall constitute the membership of the Section.

2.3 **Dues.** Annual dues for members and subscribers of the Section shall be in amounts determined by the Executive Committee and approved by the Bar's Board of Governors and shall be paid annually in advance. Any person who fails to pay their annual dues for the Section shall cease to be a member or subscriber of the Section.

ARTICLE 3. Section Meetings

3.1 **Annual Meeting.** The annual meeting of the Section shall be held in conjunction with the annual University of Washington Indian Law Symposium. If no University of Washington Indian Law Symposium is held in a given year, the Executive Committee may choose an alternate time and location for the annual meeting of the Section.

3.2 **Quorum and Voting.** The members of the Section present at any meeting of the Section shall constitute a quorum for the transaction of business. Action of the Section shall be by majority vote of the members present once a quorum has been established.

3.3 **Special Meetings.** Special meetings of the membership of the Section may be called by any officer of the Section at such time and place as the Section's officers may determine.

ARTICLE 4. Executive Committee

4.1 **Establishment and Composition.** The Section shall have an Executive Committee, which shall be composed of the following persons:

(a) the officers of the Section;
(b) the Immediate Past Chair of the Section; and
(c) nine members elected as At-Large members of the Executive Committee.

4.2 **Powers and Duties.** The Executive Committee shall be vested with the powers and duties necessary for administration of the affairs of the Section and shall perform duties assigned to it by the Board of Governors.

4.3 **Quorum and Voting.** A majority of the Executive Committee constitutes a quorum needed for action. Action of the Executive Committee shall be by majority vote of those present once a quorum has been established.

4.4 **Meetings.** The annual meeting of the Executive Committee shall be held in conjunction with the annual meeting of the Section. Additional meetings of the Executive Committee shall be held at times and places and in a manner as may be designated by the Chair or a majority of the Executive Committee. In addition to the annual meeting, the Executive Committee shall conduct a minimum of four additional meetings annually.

ARTICLE 5. Officers

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

5.2 **Chair.** The Chair shall preside at all meetings of the Section and of the Executive Committee. The Chair shall formulate and present at each annual meeting of the Section an annual report of the work of the Section for the then past year. The Chair shall perform such other duties as usually pertain that office or as may be delegated by the Executive Committee.

5.3 **Chair-Elect.** Upon the death, resignation, or during the unavailability or disability of the Chair, or upon their refusal to act, the Chair-Elect shall perform the duties of the Chair for the remainder of the Chair's term, except in the case of the Chair's unavailability or disability, and then only during so much of the term as that situation continues.

5.4 **Secretary-Treasurer.** The Secretary-Treasurer shall take minutes at each meeting of the Section and of the Executive Committee and provide them to the Bar for publication and record retention. The Secretary-Treasurer shall work with the Bar to ensure that the Section complies with the Bar's fiscal policies and procedures, work with the Bar to prepare the Section's annual budget, and review the Section's monthly financial statements for accuracy and comparison to the Section's approved budget. In conjunction with the Chair and as authorized by the Executive Committee, the Secretary-Treasurer shall attend generally to the business of the Section.

ARTICLE 6. Elections

6.1 **Elective Offices.**

(a) **Officers.** The membership of the Section annually shall elect a Chair-Elect and a Secretary-Treasurer to serve one-year terms.

(b) **At-Large Members of Executive Committee.** There shall be nine At-Large members of the Executive Committee. Three At-Large members shall be elected each year. Of the At-Large members, one third should be from Eastern Washington and two thirds should be from Western Washington. The length of terms for At-large members shall be three years.

6.2 **Chair.** The Chair shall serve a one-year term. The Chair-Elect shall automatically succeed to the office of the Chair upon the conclusion of the Chair's term. If the office of Chair-Elect becomes vacant such that no Chair-Elect is available to succeed to the Chair position, then a Chair shall be elected in the same manner as set forth in Section 6.1 above.

6.3 **Nominations.** The Chair shall annually appoint a nominating committee of not less than three members of the Section, of which at least one shall not be a member of the Executive Committee, which committee shall make and report nominations to the Executive Committee for the offices of Chair-Elect, Secretary-Treasurer, and At-Large members of

the Executive Committee to succeed those whose terms will expire that year, and to fill vacancies then existing for unexpired terms. In addition, any Section member may submit their own name and application materials, or the name of another Section member, via email to either the primary contact of the Nominating Committee, or the WSBA liaison. The Executive Committee shall approve a list of nominees for each open position.

6.4 **Voting.** Nominations and elections for open Executive Committee positions shall be held between the beginning of March and the end of June each year. The Bar shall 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 Executive Committee shall implement a random tiebreaker of its choice, such as a coin toss, to determine the winner.

6.5 **Terms of Office.** All Executive Committee positions shall begin October 1 each year.

6.6 **Interim Appointments.** In the event of a vacancy of an Executive Committee position during the interim between annual elections, the Executive Committee shall appoint, by majority vote, a successor to serve until the next annual election when an individual shall be elected to serve the remainder of the vacated term.

ARTICLE 7. Committees

7.1 **Establishment and Appointment.** The Chair may appoint additional committees of the Section to perform such duties and exercise such powers as the Executive Committee may direct.

7.2 **Composition.** Such additional committees shall be limited to members or subscribers of the Section and may be limited to members of the Executive Committee.

ARTICLE 8. Amendments

These bylaws may be amended at any annual meeting of the Section by a majority vote of the 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.

WASHINGTON STATE BAR ASSOCIATION

INDIAN LAW SECTION BYLAWS

~~Bylaws~~
~~As last~~
as amended and approved by
the WSBA Indian Law Section on August 19, 2025,
and the WSBA Board of Governors on ~~November 16, 2017~~ , 2025.

ARTICLE 1. Identification

~~1.1~~ **Creation.** The Indian Law Section ("Section") of the Washington State Bar Association ~~(the~~
1.1 ~~"Section~~("Bar") is established pursuant to the Bar's Bylaws ~~of the Washington State Bar Association (the "Bar").~~.

1.2 **Jurisdiction.** The jurisdiction of the Section shall be all aspects of Indian Law.

~~1.2~~1.3 **Purpose.** The purpose of the Section shall be to seek the participation of all interested members of the Bar, and of county and local bar associations, in order to benefit such members, their clients, and the general public. In conformity with the Bar's Bylaws, the Section shall pursue this purpose by:

(a) ~~By~~ providing the opportunity for exchange of ideas in ~~the area of~~ Indian law~~;~~, to further the development of ~~this area of the law;~~Indian law, to foster the development of potential practitioners thereof, to communicate useful information ~~pertaining to~~concerning Indian law to members of the Bar; and to improve the application of justice in ~~this field, all in conformity with the Bylaws of the Bar.~~Indian law;

(b) ~~By~~ initiating and implementing common projects~~.~~;

(c) ~~By review of~~reviewing pending legislation and development of proposed statutory enactments to improve and to facilitate the administration of justice ~~within the Section's area of interest.~~in Indian law; and

(d) ~~By~~ undertaking such other ~~service~~services as may ~~be of~~ benefit ~~to the~~ members of the Bar, the legal profession, and the public.

1.4 **Limitations.** These bylaws have been adopted subject to the applicable Washington

Rules of Court and the Bylaws of the Bar.

~~1.5~~ ~~**Principal** **Office.** The principal office of the Section shall be maintained in~~ the offices of
1.5 the Bar.

1.6 **Fiscal Year.** The fiscal year of the Section shall coincide with that of the Bar.

ARTICLE 2. Membership

2.1 **Enrollment.** Any ~~Active~~active or inactive member in good standing of the Bar may be enrolled as a voting member of the Section upon request and payment of annual Section dues in the amount and for the purpose approved by the Board of Governors of the Bar. In accordance with the Bylaws of the Bar, law students may be enrolled as non-voting members ("subscribers") of the Section. Subscribers and inactive members of the Bar may not hold a ~~section~~Section office or serve on the Section's Executive Committee.

2.2 **The Membership.** Members enrolled as provided in Section 2.1 shall constitute the membership of the Section.

2.3 **Dues.** ~~Dues~~Annual dues for members and subscribers of the Section shall be in ~~the amount~~amounts determined by the ~~executive committee~~Executive Committee and approved by the Bar's Board of Governors and shall be paid annually in advance. ~~Dues for law students shall be a standard annual amount set by the Bar's Board of Governors.~~ Any person who ~~shall have failed~~fails to pay ~~the~~their annual dues for the Section shall cease to be a member or subscriber of the Section.

ARTICLE 3. Section Meetings ~~of the Membership~~

3.1 **Annual Meeting.** The annual meeting~~,~~ of the Section shall be held in conjunction with the ~~WSBA~~annual University of Washington Indian Law ~~Section CLE~~Symposium. If no University of Washington Indian Law Symposium is held in a given year, the Executive Committee may choose an alternate time and location for the annual meeting of the Section.

~~3.2~~ **Quorum and Voting.** The members of the Section present at any meeting of the Section shall constitute a quorum for the transaction of business.

~~3.4~~3.2 ~~**Controlling Vote.**~~ Action of the Section shall be by majority vote of the members present once a quorum has been established.

~~3.5~~3.3 **Special Meetings.** Special meetings of the membership of the Section may be called by any officer of the Section at such time and place as the Section's officers may determine.

ARTICLE 4. Executive Committee

4.1 **Establishment and Composition.** The Section shall have an Executive Committee, which shall be composed of the following persons:

(a) the officers of the Section;
(b) the Immediate Past Chair of the Section; and
(c) nine members elected as At-Large members of the Executive Committee.

4.14.2 **Powers and Duties.** The executive committeeExecutive Committee shall be vested with the powers and duties necessary for the administration of the affairs of the Section and shall perform duties assigned to it by the Board of Governors.

4.2 **Composition**. The executive committee shall be composed of the following person:

( ) The officers;
( ) The Immediate Past Chair;**Quorum** **and**
( ) Nine members elected as At-Large members to the executive committee.

4.74.3 **~~Controlling Vote~~ Voting.** A majority of the ~~executive committee~~Executive Committee constitutes a quorum needed for action. Action of the ~~executive committee~~Executive Committee shall be by majority vote of those present once a quorum has been established.

4.84.4 **Meetings.** The annual meeting of the ~~executive committee~~Executive Committee shall be held in conjunction with the annual meeting of the Section. ~~Special~~Additional meetings of the Executive Committee shall be held at ~~the time~~times and ~~place~~places and in a manner as may be designated by the Chair or a majority of the ~~executive committee. The executive committee shall be expected to~~Executive Committee. In addition to the annual meeting, the Executive Committee shall conduct a minimum of four additional meetings annually.

ARTICLE 5. Officers

5.1 **Officers.** The officers of the Section shall be the Chair, the Chair-~~elect~~Elect, and the Secretary~~/-~~Treasurer.

5.2 **Chair.** The Chair shall preside at all meetings of the Section and of the ~~executive committee. He/she~~Executive Committee. The Chair shall formulate and present at each annual meeting of the ~~Bar~~Section an annual report of the work of the Section for the then past year. ~~He/she~~The Chair shall perform such other duties as usually pertain ~~to his/her~~that office or as may be delegated by the ~~executive committee~~Executive Committee.

5.3 **Chair-~~elect~~Elect.** Upon the death, resignation, or during the unavailability or disability of the Chair, or upon ~~his/her~~their refusal to act, the Chair-~~elect~~Elect shall perform the duties of the Chair for the remainder of the ~~Chair's~~Chair's term, except in the case of the ~~Chair's~~Chair's unavailability or disability, and then only during so much of the term as ~~the disability~~that situation continues.

5.4 **Secretary~~/-~~Treasurer.** The Secretary~~/-~~Treasurer ~~will~~shall take minutes at each meeting of the Section and ~~executive committee~~of the Executive Committee and provide them to the Bar for publication and record retention. The Secretary-Treasurer ~~will~~shall work with the Bar to ensure that the Section complies with ~~Bar~~the Bar's fiscal policies and procedures, work with the Bar to prepare the Section's annual budget, and review the Section's monthly financial statements for accuracy and comparison to the Section's approved budget. In conjunction with the Chair and as authorized by the ~~executive committee, he or she~~Executive Committee, the Secretary-Treasurer shall attend generally to the business of the Section.

ARTICLE 6. Elections

6.1 **Elective Offices.**

(a) **Officers.** The membership of the Section annually shall elect a Chair-~~elect~~Elect and a Secretary~~/-~~Treasurer to serve ~~a~~ one-year ~~term~~terms.

(b) **At-Large Members of ~~executive committee.~~ Executive Committee.** There shall be

nine ~~(9)~~ At-Large members of the ~~executive committee.~~Executive Committee. Three ~~(3)~~ At-Large members ~~are to~~shall be elected each year. Of the At-Large members, one third ~~(1/3) of~~ should be from Eastern Washington and two thirds ~~(2/3)~~ should be from Western Washington. The length of terms for At-large members shall be three ~~(3)~~ years.

~~Chair.~~ The Chair ~~elect~~ shall serve a one-year term. The Chair-Elect shall automatically succeed to the office of the Chair~~.~~ upon the conclusion of the Chair's term. If the office of Chair-~~elect~~Elect becomes vacant such that no Chair-Elect is available to succeed to the Chair position, then a Chair shall be elected in the same manner as set forth in Section 6.2 ~~6.1~~ above.

6.3 **Nominations.** The Chair shall annually appoint a nominating committee of not less than three ~~(3)~~ members of the Section~~.~~, of which at least one shall not ~~members~~be a member of the ~~executive committee~~Executive Committee, which committee shall make and report nominations to the ~~executive committee~~Executive Committee for the offices of Chair-~~elect~~Elect, Secretary~~/~~-Treasurer, and At-Large members of the Executive Committee to succeed those whose terms will expire that year, and to fill vacancies then existing for unexpired terms. ~~The executive committee will~~In addition, any Section member may submit their own name and application materials, or the name of another Section member, via email to either the primary contact of the Nominating Committee, or the WSBA liaison. The Executive Committee shall approve a list of nominees for each open position.

6.4 **Voting.** Nominations and elections for open ~~executive committee~~Executive Committee positions ~~will~~shall be held between the beginning of March and ~~May~~the end of June each year. The Bar ~~will~~shall 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 Executive Committee ~~will~~shall implement a random ~~tie-breaker~~tiebreaker of its choice, such as a coin toss, to determine the winner.

6.5 ~~Term~~**Terms of Office.** All ~~executive committee~~Executive Committee positions ~~will~~shall begin October 1 each year.

6.6 **Interim Appointments.** In the event of a vacancy of an Executive Committee position during the interim between annual ~~meetings~~elections, the ~~executive committee~~Executive Committee shall appoint, by ~~a~~ majority vote, a successor to serve until the next annual election when an individual ~~will~~shall be elected to serve the remainder of the vacated term.

ARTICLE 7. ~~Substantive Responsibilities~~

Committees~~.~~

7.1 **Establishment and Appointment.** The Chair may appoint additional committees of the Section to perform such duties and exercise such powers as the ~~executive committee~~Executive Committee may direct.

~~7.2 **Budget Committee**. The duties of the budget committee are to prepare a proposed budget in consonance with the objectives of the Section for the expenditure of the Section funds.~~

7.2 **Composition.** Such additional committees shall be limited to members or subscribers of the Section and may be limited to members of the Executive Committee.

ARTICLE 8. Amendments

These bylaws may be amended at any annual meeting of the Section by a majority vote of the members of the Section present and voting, or at an ~~executive committee~~Executive Committee meeting by a majority vote of the voting ~~executive committee~~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.

~~- Adopted 1988, as amended.~~

~~- Approved as amended by the WSBA Board of Governors on July 23, 2010. In accordance with the WSBA Bylaws, the approved amendments are specific to Article 2.1, Membership, stating that law students may join the Section as non-voting members.~~

~~- Approved as amended by the WSBA Board of Governors on November 16, 2017 in accordance with WSBA Bylaws, in particular with regard to the timing of election, publication of meeting minutes, and tie-breaker.~~

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

FROM: Francis Adewale, WSBA President-elect

RE: 2025-2026 Chair Appointments

DATE: August 26, 2025

Consent: Appointment of the 2025-2026 WSBA committee and board chairs listed below.

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 chairs for the 2025-2026 year. The candidates' resumes are attached. All eligible members of the committees listed below were encouraged to apply for the Chair position. Additional Chair appointments forthcoming.

Committee/Board	Recommended for Appointment
Court Rules and Procedures Committee	Chair: Andrew Yi
Editorial Advisory Committee	Chair: Benjamin Gould

Andrew Y. Yi
[redacted]; [redacted]

EDUCATION

VANDERBILT UNIVERSITY LAW SCHOOL, NASHVILLE, TN
Doctor of Jurisprudence, December 2011
Honors and Activities: Thomas H. Malone Inn of Phi Delta Phi (International Legal Honors and Ethics Fraternity); Vanderbilt-Meharry Interdisciplinary Case Competition

NEW YORK UNIVERSITY, NEW YORK, NY
B.A., Economics (Minor: Mathematics), *magna cum laude*, May 2008
Honors and Activities: Phi Beta Kappa; Dean's List (all semesters); Red Dragon Society; New York University Founders Day Award (awarded to undergraduates graduating in the top 10% of their class); New York University Honors Scholar

PROFESSIONAL EXPERIENCE

KING COUNTY PROSECUTING ATTORNEY'S OFFICE, SEATTLE, WA (APRIL 2025 - PRESENT)
Senior Deputy Prosecuting Attorney

SEATTLE UNIVERSITY SCHOOL OF LAW, SEATTLE, WA (SUMMER 2025 TERM)
Adjunct Professor of Law

PIERCE COUNTY PROSECUTING ATTORNEY'S OFFICE, TACOMA, WA (JUNE 2021 – APRIL 2025)
Deputy Prosecuting Attorney

THURSTON COUNTY OFFICE OF PUBLIC DEFENSE, OLYMPIA, WA (AUGUST 2014 – MAY 2021)
Defense Attorney

PIERCE COUNTY DEPARTMENT OF ASSIGNED COUNSEL, TACOMA, WA (JANUARY 2014 – AUGUST 2014)
Defense Attorney

THE LAW OFFICES OF KRUPA & CLARK, P.S., TACOMA, WA (FALL 2012-WINTER 2013)
Associate Attorney

PIERCE COUNTY PROSECUTING ATTORNEY'S OFFICE, TACOMA, WA (SPRING 2012 – FALL 2012)
Deputy Prosecuting Attorney

JUDGE PRO TEMPORE EXPERIENCE

SAN JUAN COUNTY DISTRICT COURT, FRIDAY HARBOR, WA (OCTOBER 2024 - PRESENT)

LEWIS COUNTY SUPERIOR COURT, FRIDAY HARBOR, WA (AUGUST 2024 - PRESENT)

SAN JUAN COUNTY SUPERIOR COURT, FRIDAY HARBOR, WA (NOVEMBER 2024 ANTICIPATED START - PRESENT)

THURSTON COUNTY DISTRICT COURT, OLYMPIA, WA (AUGUST 2021 - PRESENT)

LAKEWOOD MUNICIPAL COURT, LAKEWOOD, WA (AUGUST 2021 - PRESENT)

OLYMPIA MUNICIPAL COURT, OLYMPIA, WA (AUGUST 2021 - PRESENT)

PRESENTATIONS

Fall 2022 – Presented as part of a panel to help train the New Jersey judiciary, defense, and prosecution bars on attorney-conducted voir dire and educating on Washington's GR 37 Rule regarding the use of peremptory strikes in jury selection

Spring 2017 - "A Career in Law - Perspectives from a Public Defender" at Curtis High School in University Place, Washington presented to Elizabeth Corbishley's class at Curtis High School in University Place, Washington

Spring 2016 - "A Career in Law - Perspectives from a Public Defender" presented to Elizabeth Corbishley's class at Curtis High School in University Place, Washington

October 2013 - "Anatomy of a Malpractice Suit" (approved for 1 Washington MCLE credit) presented to the Honorable Robert J. Bryan Inns of Court in Tacoma, Washington

COMMUNITY SERVICE

Washington State Access to Justice Board (OCTOBER 2024 – PRESENT) Appointed by the Washington Supreme Court for a three-year term starting October 1, 2024. The Board coordinated civil legal aid efforts around the state with a particular focus on race-based equity.

Washington State Bar Association Court Rules and Procedures Committee Board: Chair of the Subcommittee Studying Proposed Changes to the Rules of Appellate Procedure (OCTOBER 2024 – PRESENT) Appointed by the Washington State Bar Association for a two-year term starting October 1, 2024. Studied and analyzed proposed new court rules and amendments as requested by the Supreme Court.

University of Washington – Tacoma: Advisory Board Member of the Legal Pathways Program (FEBRUARY 2025 – PRESENT) Serve on the advisory board for the UW – Tacoma's Legal Pathways Program, designed to serve as a pipeline from college to law school for first-generation college students and students of color.

Korean-American Bar Association of Washington: Board of Directors (JANUARY 2025 – PRESENT)

Board Member and Volunteer Ambassador - Climbers of Color (JULY 2018 – JULY 2023) (a non-profit dedicated to increasing diversity in the climbing, mountaineering, and skiing communities by developing leaders of color) from 2017 to Present

Board member – A Step Ahead in Pierce County (2012 - 2016) (a non-profit serving developmentally disabled children) from 2012 to 2016

Board member – Puget Sound Chapter of the MS Society (2014 - 2017)

Clover Park Community College Career and Technical Education Advisory Board (2015 - 2017)

University Place School District Career and Technical Education Advisory Board (2013 - 2015)

BAR ADMISSIONS

Washington State Courts; United States District Court for the Western District of Washington; United States Court of Appeals for the Ninth Circuit

ASSOCIATIONS

Graduate of the 2024 National Judicial College's Course for Aspiring Judges (sole recipient of a full tuition scholarship from the National Asian Pacific Bar Association)

Graduate of the 2024 Washington State Judicial Institute Clinic (a non-profit dedicated to the appointment and election of people of color, LGBTQ+ persons, and women to the bench)

Korean Prosecutors Association (OCTOBER 2024 – PRESENT)

National Asian Pacific Bar American Bar Association (JULY 2024 – PRESENT)

American Bar Association (#06121462) – Judicial Division Appellate Judges Conference Member (JUNE 2024 – PRESENT)

Korean-American Bar Association of Washington (OCTOBER 2024 – PRESENT)

Tacoma-Pierce County Bar Association (MAY 2012 – SEPTEMBER 2014; JUNE 2024 – PRESENT)

The Appellate Project (MAY 2024 – PRESENT) – a non-profit organization empowering students of color to thrive in the appellate field by providing mentorship

Benjamin Gould

1201 Third Avenue, Suite 3400, Seattle, Washington 98101
[redacted] bgould@kellerrohrback.com

EXPERIENCE

Keller Rohrback L.L.P.

Sept. 2008 – July 2009; Sept. 2010 – present
Seattle, WA

- First an associate, and then a partner, representing plaintiffs in cases involving privacy, pensions, securities, employment, and consumer protection. Appeals, largely federal, constitute a significant portion of my practice.

The Hon. Betty Binns Fletcher, U.S. Court of Appeals for the Ninth Circuit

Aug. 2009 – Aug. 2010
Seattle, WA

- Law clerk to Judge Fletcher.

ACLU Drug Law Reform Project

Aug. 2007 – Aug. 2008
Santa Cruz, CA

- One-year fellowship litigating civil and criminal cases related to drug policy and civil rights.

The Hon. Diana E. Murphy, U.S. Court of Appeals for the Eighth Circuit

Aug. 2006 – Aug. 2007
Minneapolis, MN

- Law clerk to Judge Murphy.

EDUCATION

Yale Law School

J.D., 2006

- Editor, *Yale Law Journal*
- Editor-in-Chief, *Yale Journal of Law and the Humanities*

Yale College

B.A., 2002

- B.A. *summa cum laude*, English; Phi Beta Kappa

REPRESENTATIVE MATTERS

- *City of Buffalo v. Hyundai Motor Am., Inc.*, 140 F.4th 1249 (9th Cir. 2025) and *City of Buffalo v. Hyundai Motor Am., Inc.*, No. 24-2350, 2025 WL 1721053 (9th Cir. June 20, 2025).
  - Briefed and argued for appellees. The Ninth Circuit largely affirmed the district court.
- *M.N. v. MultiCare Health Sys., Inc.*, 541 P.3d 346 (Wash. 2024).
  - Briefed and argued for petitioners. The court reversed the lower courts and held that the petitioners had established legal causation.
- *Jabbari v. Farmer*, 965 F.3d 1001 (9th Cir. 2020) and *Jabbari v. Farmer*, 813 F. App'x 259 (9th Cir. 2020).
  - Author of appellees' brief. The Ninth Circuit affirmed the district court's class-action certification and settlement approval.
- *Campidoglio LLC v. Wells Fargo & Co.*, 870 F.3d 963 (9th Cir. 2017).
  - Briefed and argued for appellants. The Ninth Circuit revived appellants' action for breach of contract.

SELECTED PUBLICATIONS, PRESENTATIONS, AND HONORS

- *On the Lawfulness of Awards to Class Representatives,* 2023 Cardozo L. Rev. de novo 1.
- *Alphabet Soup: Exploring Washington's Unique "ABC Rule" on Attorney Fees From Collateral Litigation,* Washington State Bar News (Feb. 9, 2023).
- *Washington's Flawed ABC Rule,* 58 Willamette L. Rev. 251 (2022).
- *Vaccine Law: An Overview of Current Law and a Look at the Future*, NWLawyer, Nov. 2019, at 48 (surveying vaccine mandates and the cases upholding them).
- Selected to 2013–2019 "Rising Stars" and 2020–2025 "Super Lawyers" in *Washington Law & Politics*.
- *Best Lawyers in America*®, Appellate Practice, Seattle, Washington, 2024–2026

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

Doug Ende, Chief Disciplinary Counsel

Rachel Agent, Disciplinary Programs and Systems Manager

FROM: Sunitha Anjilvel, President

DATE: August 26, 2025

RE: Presidential Appointments of members to the Oath Review and Drafting Task Force

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CONSENT: Accept the following Presidential Appointments for the Oath Review and Drafting Task Force.

At its meeting in July 2025, the Board of Governors approved the creation of the Oath Review and Drafting Task Force. Upon approval, staff liaisons worked with Manager of Volunteer Engagement Paris Eriksen to conduct outreach and recruitment for the member positions. The below individuals were nominated by the staff team consisting of Executive Director Terra Nevitt, Chief Disciplinary Counsel Doug Ende, Disciplinary Programs and Systems Manager Rachel Agent, and Paris Eriksen. I have approved these appointments and note that the Board of Governors has the authority to accept or reject these appointments.

Chair:	Rajeev D. Majumdar
2 Current/Former BOG Members:	Hunter M. Abell
	Kyle D. Sciuchetti
Members At-Large: *(composition requires at least 1 LPO or 1 LLLT and 1, Judicial Member)*	Angela J. Balconi (LPO member)
	Rebecca R. Glasgow (Judicial member)
	Courtney Hudak
	Professor Monte Mills
	James Smith (Judicial member)
	Roger D. Wynne

The term begins upon appointment for a term length of 'one year after the first Task Force meeting' as stated in the charter.

Attachments:
Oath Review and Drafting Task Force – Applicants Materials
Oath Review and Drafting Task Force Charter

WILLIAMS KASTNER™

August 20, 2025

Sunitha Anjilvel
WSBA President
Washington State Bar Association
1325 4th Ave., Suite 600
Seattle, WA 98101

Re: WSBA Oath Review & Drafting Task Force

Dear President Anjilvel:

I respectfully submit my name for consideration to serve on the WSBA Oath Review & Drafting Task Force ("Task Force"). I only recently became aware of the existence of the Task Force. Consequently, I ask that this application be considered, despite the timeline for consideration having previously lapsed.

Like you, I am passionate about upholding our profession and ensuring the highest standards of professional integrity. I believe the Task Force has a unique opportunity to advance that goal by focusing and reformulating the oath of our Washington licensed legal professionals. Moreover, given the experience at the recent Law Day exercises, I believe there is widespread interest in the oath composition.

I am excited that the Board of Governors is looking at this issue. I believe that I could offer a unique perspective, especially given my prior WSBA service and current service in the Legislature. I am particularly interested in the fact that the oath was prescribed at one point by the Legislature.

Thank you for the consideration. Please do not hesitate to let me know if you have any questions or concerns.



Hunter M. Abell
[redacted]
habell@williamskastner.com

Angela J. Balconi

Objective

With a passion for the Real Estate industry, I am a resourceful, results-oriented problem solver with exceptional communication and leadership skills seeking a volunteer position with the WSBA Oath Review and Drafting Task Force.

Experience

May 2021 to Present — Chicago Title of Washington — Everett, WA

President County Manager, Limited Practice Officer, Client Services

- Lead the management team to mentor and train escrow, title, sales, and customer service staff though process and procedure development
- Respond to inquiries and work to resolve challenges efficiently, legally, and accurately
- Educate real estate brokers and other industry professionals through continuing education courses
- Manage and track the operation Profit and Loss Statements

January 2019 to May 2021 — Chicago Title of Washington — Seattle, WA

Vice President Escrow Operations Manager, Limited Practice Officer, Client Services

- Manage, train and mentor escrow staff through process and procedure development
- Respond to inquiries and work to resolve challenges efficiently, legally, and accurately
- Educate real estate brokers and other industry professionals through continuing education courses

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August 2013 to December 2018 Chicago Title of Washington — Bellevue, WA

Assistant Vice President Branch Manager, Limited Practice Officer, Client Services

- Manage, train and mentor escrow staff
- Legally close real estate transactions with high efficiency and excellent customer service
- Educate real estate brokers through continuing education courses

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July 2003 to August 2013 — Escrow Professionals of Washington — Bellevue, WA

Branch Manager, Limited Practice Officer, Escrow Officer, Client Services

- Manage, train and mentor escrow staff
- Legally close real estate transactions with high efficiency and excellent customer service
- Sales representative for Capitol Hill, Bellevue Way and Mercer Island Coldwell Banker Bain offices
- Educate real estate brokers through continuing education courses

Dec 2001 to July 2003 Wells Fargo Escrow Bellevue, WA

Branch Manager, Limited Practice Officer, Escrow Officer

- Manage, train and mentor escrow staff
- Legally close real estate transactions with high efficiency and excellent customer service
- Handle high volume builder accounts with accuracy and excellent customer service

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Nov 1993 to July 2001 Nordstrom, Nees & Janacek, P.S. Spokane, WA

Escrow Closer

- Legally close real estate transactions with high efficiency and excellent customer service

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Accomplishments

- Limited Practice Officer
- Designated Escrow Officer (while at Escrow Professionals of Washington)
- Certified Real Estate Instructor
    - Real Estate Fundamentals
    - Current trends and issues
    - Real Estate Law
    - Advanced Real Estate Law
    - Real Estate Closing Practices
    - Legal Aspects 9agency, disclosure, etc.)
    - Computers and/or other real estate technologies
- Fidelity National Financial Leadership Program, Group Presentation Winner
- Audit Excellence Award
- Hosted and developed annual Escrow Best Practices event for Chicago Title King/Pierce County providing continuing education for our teams
- Created a training program for escrow career development to mentor those new to our industry
- Participation on our national Digital Solutions committee contributing to the development and testing of new software

Paris Eriksen

From: Glasgow, Rebecca <J_R.Glasgow@courts.wa.gov>
Sent: Thursday, August 7, 2025 12:59 PM
To: Bar Leaders
Subject: [External]interest in Oath Review and Drafting Task Force
Attachments: Glasgow CV 2024.docx; GlasgowBio2024.FINAL_.docx

Follow Up Flag: Follow up
Flag Status: Flagged

Good afternoon,

I am writing to express my interest in serving on the Oath Review and Drafting Task Force. I have served on various WSBA committees and work groups in the past, so I am familiar with the stakeholdering and other work involved. I have also communicated with Doug Ende about the anticipated time commitment and I feel comfortable that I can commit to the work so long as meeting schedules take our other commitments like bench time and Supreme Court commission meetings into account. I am particularly interested in this task force because I work with a lot of law students and attorneys just entering the profession, I am always interested in ensuring their success, and I see that they take the oath very seriously, as they should. I see the oath as an opportunity to set expectations and guide the success of new members. We should commit to maintaining an oath that demands excellence and conveys the highest values of our profession, and I would be honored to be a part of this task force's work.

I have attached a resume and a bio. Although the resume does not yet include 2024 and 2025 CLE presentations/speaking engagements, the list of prior CLE presentations should give you a flavor for the types of presentations and speaking engagements that I typically do.

Thank you for your consideration.

Judge Rebecca Glasgow
Washington Court of Appeals, Division Two
J_R.Glasgow@courts.wa.gov
(she/her)

Judge Rebecca Glasgow

Judge Rebecca Glasgow was elected to Division Two of the Washington Court of Appeals in 2018 and served as Chief from 2022 to 2024. Prior to joining the bench, she served as a Deputy Solicitor General in the Washington Attorney General's Office arguing cases primarily in the Washington Supreme Court and the Ninth Circuit. She also served as general counsel to the Washington Secretary of State. Before joining the Attorney General's Office, she served as a law clerk at the Washington Supreme Court for Justices Bobbe Bridge and Susan Owens.

Rebecca has a long history of service to her community and was named a Washington State Bar Association "Local Hero" in 2014. She volunteered at her local legal clinic for more than a decade, helping clients who could not afford an attorney. Rebecca has served as the statewide President of Washington Women Lawyers and is now a co-chair of Washington's Gender and Justice Commission. She also served on the Racial Justice Consortium for Washington courts. Rebecca is a founding member of the Judicial Institute, which promotes the election and appointment of people of color, LGBTQ+ people, and women to the bench. She has also served on the University of Washington Law School Dean's Leadership Council. Rebecca has received the Washington Women Lawyers Legacy Award, the Washington State Bar Association's Outstanding Judge Award, and the Washington Law Review's Distinguished Alumni Award.

Rebecca graduated *magna cum laude* from Wake Forest University and with honors from the University of Washington School of Law, where she was an executive editor of the Washington Law Review.

Rebecca and her family live in Thurston County.

Judge Rebecca R. Glasgow

J_R.Glasgow@courts.wa.gov
[redacted]

JUDICIAL EXPERIENCE

Washington State Court of Appeals, Division Two 2019 to present
Chief Judge (2022 to 2024)

- Write 60 to 75 opinions per year, deciding appeals arising from Washington State trial courts.
- Decide more than 200 appeals per year, sitting on three-judge panels.
- As Chief, led all aspects of administration of Division Two, a small court with seven judges and approximately 50 court staff.
- Participate on statewide committees governing various aspects of Washington's court system, for example, the Board of Judicial Administration, the Court of Appeals Legislative Committee, and the Court of Appeals Personnel Committee.
- Serve as co-chair of Washington's Gender and Justice Commission and serve as co-chair of the Commission's Education Committee, developing curricula for statewide continuing judicial education on topics related to equity in the state court system. Authored the Gender and Justice study chapter on achieving diversity on Washington juries.
- Served as a member of Washington's Racial Justice Consortium, developing strategies for eliminating racial bias in Washington's court system.
- Teach continuing judicial education and continuing legal education courses on a variety of topics, including legal writing and effective oral argument.

LEGAL EXPERIENCE

Washington State Attorney General's Office 2012 to 2018
Deputy Solicitor General

- Served as the State's lead election lawyer, providing legal advice and representation on high profile election cases and issues.
- Served as Acting Solicitor General when the Solicitor General was on family leave.
- Briefed and argued cases before the Washington Supreme Court, the Ninth Circuit, and the trial courts in cases of particular significance to Washington, including *Arlene's Flowers* and defense of Washington's gun background check initiative and minimum wage initiative.
- Drafted briefs to the United States Supreme Court and other federal courts.
- Led workgroup creating the AGO Guidance Concerning Immigration Enforcement and advised the Governor's Office on immigration issues in the wake of the Trump administration's increased immigration enforcement.
- Reviewed and edited appellate briefs and prepared attorneys for argument at the Washington Supreme Court, the Ninth Circuit, and the Washington Court of Appeals.
- Prepared and defended ballot titles and Voters' Pamphlet statements for statewide measures.
- Authored and edited Attorney General Opinions on topics such as police body cameras.
- Served as pro bono attorney for clients through Thurston County Volunteer Legal Services.

Assistant Attorney General, Revenue and Social and Health Services Divisions 2007 to 2012

- Represented the state agencies before state and federal courts.
- Served on Washington's tobacco enforcement team litigating cases, for example, to bring tax parity for roll your own cigarettes.
- Served on a complex litigation team.

Supreme Court of Washington, Olympia, WA 2002 to 2007
Law Clerk, Justice Bridge, 2003 to 2007 **Justice Owens**, 2002 to 2003

- Drafted bench memoranda, majority, dissenting, and concurring opinions for the justices.
- Hired, supervised, and evaluated law student interns.
- Issues facing the court included the legality of the Sea-Tac third runway, the constitutionality of a privately-run prison industry, the validity of the top two primary voting system, the constitutionality of Washington's Defense of Marriage Act, and the constitutionality of an initiative capping property tax increases.

ADMISSIONS

United States Supreme Court
United States Court of Appeals, Ninth Circuit
United States District Court, Eastern District and Western District of Washington
Washington State Courts

EDUCATION

University of Washington School of Law, Seattle, WA June 2002
Juris Doctor, *with honors*

- Washington Law Review, Executive Notes and Comments Editor
- Comment, *Can Students Sue When Schools Don't Make the Grade? The Washington Assessment of Student Learning and Educational Malpractice,* 76 Wash. Law Rev. 893 (2001)
- First Year Appellate Advocacy Competition, Perfect Brief Score
- Civil Procedure Teaching Assistant, Street Youth Legal Advocates of Washington Governing Board, and Environmental Law Society Treasurer and Fundraising Coordinator

Wake Forest University, Winston-Salem, NC June 1994
Bachelor of Arts, *magna cum laude*

ACCESS TO JUSTICE AND COMMUNITY INVOLVEMENT

- Washington Gender and Justice Commission, 2019 to present
  - Commission Co-Chair, 2023 to present
  - Education Committee Co-Chair, 2020 to present
  - Legislative Committee member, 2022 to present
  - Lead Author, Jury Diversity Section, Gender Bias Study, 2020 to 2021
- Washington Racial Justice Consortium, 2021 to 2022
- Board of Judicial Administration, Division Two Representative, 2021 to 2022, 2024 to present
  - Legislative Committee, 2021 to 2022, 2024 to present
  - Annual Judicial Conference Planning Committee, 2020 to present

Annual Appellate Conference Planning Committee, 2019 to 2022
- Washington State Courts Historical Society, Board Member, 2021 to present
- Robert J. Bryan Inn of Court, 2020 to 2023
  Board, 2021 to 2022
  Outreach Chair, 2021 to 2022
- University of Washington, Tacoma, Legal Pathways Mentor, 2020 to 2023
- Campaign for Equal Justice, Board of Directors, 2013 to 2018
  Executive Committee, 2015 to 2016
- Strophy Foundation (supporting Thurston County Therapeutic Court participants), 2016 to 2018
- YMCA Mock Trial Competition, final round judge, 2016, 2017
- Thurston County Citizens' Commission on Salaries for Elected Officials, 2015 to 2018
- University of Washington School of Law Alumni Engagement Committee, and Dean's Leadership Council, 2008 to present
  Executive Committee Member, 2012 to 2014
  Law School Strategic Planning Committee, 2020 to 2021
  Moot Court, Mock Interview, and Admitted Student Outreach Volunteer
- Seattle University School of Law, Moot Court Volunteer Judge, 2020 to present
- Judicial Institute Founding Member, 2012 to present
  Fundraising Chair, 2012 to 2017
  Judicial Advisory Committee, 2019 to present
- Thurston County Volunteer Legal Services Foundation Board, 2004 to 2013
  President, 2008
- Washington Women Lawyers, State Board, 2010 to 2018
  President, 2016 to 2017
  President Elect, 2015 to 2016
  Statewide Judicial Evaluation Committee Co-Chair, 2011 to 2015
- Washington Women Lawyers, Capital Chapter
  Board Member, 2004 to 2013
  President, 2008 to 2010
  Judicial Evaluation Committee Chair, 2008 to 2012
- Washington State Bar Association, Civil Rules Drafting Task Force, 2017 to 2018
- Washington State Bar Association, Pro Bono Legal Aid Committee, 2007 to 2012
- Washington State Bar Association, Amicus Committee, 2010 to 2012
- Washington State Bar Association, Administrative Law Section Board, 2010 to 2015

SELECT AWARDS

- Washington Law Review, Distinguished Alumni Award, 2024
- Washington State Bar Association, Outstanding Judge, 2023
- Washington Women Lawyers, Legacy Award, 2021
- Attorney General's Office STAR Award for Mentorship, 2017
- WSBA Local Hero Award, Thurston County 2014
- AGO Excellence Award, 2007, 2012
- Washington Women Lawyers, Chapter Member of the Year, 2006, 2013

SELECT ARTICLES AND PRESENTATIONS
LEGAL WRITING AND APPELLATE ADVOCACY

- Washington Network of Administrative Agencies, View from the Court of Appeals, 2023
- Pincus Professional Education, Advanced Oral Argument Skills, 2023
- Thurston County Bar Association, Effective Legal Writing, Top Ten Tips, 2023
- Appellate Motions and Effective Legal Writing, WAPA Spring Conference, Civil Track, 2023
- Advanced Appellate Oral Advocacy, one-week upper level course, University of Oregon School of Law, 2022 to present
- Avoiding Procedural Traps on Appeal, Pincus Professional Education, 2022
- Kitsap County Bar Association, Effective Legal Writing, 2022
- Crafting an Effective Brief, Washington Association of Prosecuting Attorneys, 2022
- *Coach the Court: Writing Tips from the Bench,* Washington State Bar News, 2022
- University of Washington, Advanced Legal Writing, Guest Lecture, 2022
- Persuasive Brief Writing, Convincing the Court to Want to Rule in Your Favor, 2022
- AGO, Appellate Advisors' Group, Moving the Needle in Difficult Cases, 2022
- How Best to Argue Statutory Interpretation, Pincus Professional Education, 2021
- King County Bar Association, Appellate Section, Appellate CLE, 2020
- WSBA, Appellate CLE, Brief Writing and Oral Argument Panel, 2020
- WA Criminal Defense Lawyers, Appellate Practice, Brief Writing and Oral Argument, 2020
- Pierce County Prosecutor's Office, Appellate Practice, 2020
- Washington Association of Appellate Lawyers CLE, Judges' Panel, 2019
- Washington Association of Prosecuting Attorneys, Appellate Training Program, 2018
- AGO Legal Writing Seminar, Introductions and Issue Statements, 2018
- AGO Academy, Effective Legal Writing, 2017
- AGO Motions and Injunctions CLE, Appellate Motions, 2013 and 2015
- AGO Appellate Practice CLE, Co-chair and Judges' Panel Moderator, 2015
- AGO Legal Writing Pitfalls, 2015
- AGO Legal Writing CLE Chair, 2012
- AGO Appellate Practice, "Behind the Scenes," Washington Supreme Court Practice, 2012

SELECT PRESENTATIONS AND ARTICLES

- King County Bar Association, Judicial Officer Survey Committee, Reducing Bias in Judicial Performance Evaluations, 2023
- Washington Attorney General's Office, Annual Conference, Judges' Panel, 2023
- Thurston County Bar Association, Newsletter, Gender and Justice Bias Study Overview, 2023
- Washington Women Lawyers, Olympic Peninsula Chapter, Annual Event Judges' Panel, 2023
- Government Lawyers Bar Association, Eliminating Bias in Washington Courts, 2022
- Holistic Approaches: Focus on Trauma Responsive Judging, Moderator, Fall Judicial Conference, 2022
- Eliminating Bias in Washington Courts, Washington Defense Trial Lawyers Conference, 2022
- Washington Law Review Banquet, Keynote, 2022
- Georgetown University School of Law, Clerkship Conversations, State Court Edition, 2022
- Kitsap Bar Association, Critical View of Bar Polls, 2021

- Robert J. Bryan Inn of Court, Summary of Civil Rights Cases Involving Gender Identity, 2020
- Gonzaga Law School Center for Civil and Human Rights, Guest Speaker, 2020
- Washington Women Lawyers, Capital Chapter, Running for Judicial Office Panel, 2019
- Washington Women Lawyers, Olympia Peninsula Chapter, Judges' Panel, 2019
- Washington Courts Historical Society, Ethics for State Employees, 2019
- Government Lawyers Bar Association, Ethics, 2018
- Kitsap Immigrant Rights Center, Auction and Fundraiser, Keynote Speaker, 2017
- Kitsap County Law Day Luncheon, Keynote Speaker, Challenging the President, 2017
- Kitsap County WWL, Lunch Presentation, *Arlene's Flowers*, 2017
- Judicial Institute, Panel "What about the money?" 2017 (moderator), 2022, 2024
- AGO Attorneys' Conference, "Making a Difference," 2017
- AGO Ethics CLE, Ethics and Pro Bono, Panel Member 2017
- Washington Defense Trial Lawyers Conference, Making a Difference Pro Bono Panel, 2017
- WSBA and WWL, Beyond the Dialogue, The Role of Allies, Panel Moderator, 2017
- Washington State Women's March, Planning Committee Celebration Speaker, 2017
- Thurston County Democratic Women's Club, Speaker, 2017
- Skagit County Bar Association, Campaign for Equal Justice Speaker, 2016
- AGO Attorneys' Conference, Panel Moderator, Views from the Bench, Diverse People, Diverse Work, 2015
- Washington State Elections Conference, Case Updates, 2013
- WSBA Administrative Law Section Newsletter Case Summaries, 2012 to 2015

Paris Eriksen

From: CA Hudak [redacted]
Sent: Thursday, August 7, 2025 10:46 AM
To: Bar Leaders
Subject: [External]Oath Review and Drafting Task Force
Attachments: CourtneyHudakResume.pdf

Follow Up Flag: Follow up
Flag Status: Flagged

[You don't often get email from [redacted] Learn why this is important at https://aka.ms/LearnAboutSenderIdentification]

Hello,

I would like to be considered for membership on the Oath Review and Drafting Task Force. I'm a member of the Washington State Bar, currently practicing exclusively on a pro bono basis, representing asylum seekers as a volunteer with the Northwest Immigrant Rights Project. My day job is as a Communications Specialist for King County Elections.

I'd be glad to offer my legal and communications skills to this project. During law school, I had a legal ethics externship with the Bar Association. It was educational and interesting to learn about and participate in the disciplinary process through that externship. That time marked the beginning of what is now my longstanding interest in legal ethics and how they're implemented and applied. Prior to law school and after, I have been a professional communicator. I'm particularly adept at finding plain language to communicate complex ideas. Whether in a legal context or in a communications context, being able to tell the right story both accurately and well is, I think, among the hardest and most important work.

I was grateful, earlier this year, when WSBA invited us to retake our oaths. I'm very interested in being a part of a group that reviews the current oath, considers the legal history, and works together to implement a "reinvigorated" oath for this century.

Thank you for your consideration.

Courtney Hudak

Courtney Hudak

(206) 371-5061 | [redacted]

Professional Experience

Communications Specialist, King County Elections 2022-Present

- Write and edit internal and external communications, including: voter education, voters' pamphlets, annual reports, awards submissions, stakeholder updates, presentations, newsletters, advertising, talking points and speeches for executive level and elected leadership as well as for customer service staff
- Strategize and implement social media. Create and post social media, including static and video posts in non-English languages
- Prepare leadership for press and other public events
- Serve as a media contact. Support press events
- Create, implement, and iterate communications strategies and plans, including crisis communications strategies and plans
- Develop and support relationships with internal and external partners
- Communications support for internal working groups, including: Equity and Social Justice, Records Management, Voting in Jails, and Team Wiki (researching and implementing a useable knowledge management system)

Attorney, Private Practice 2011-Present

- Obtain asylum for asylum seekers via in-court advocacy
- Manage complex client relationships under demanding circumstances
- Conduct extensive international legal research under limited-resource conditions
- Write complex legal briefing for asylum seekers who had been persecuted for their political beliefs and memberships in particular social groups (women and LGBTQ people)
- Manage general law practice, including temporary staff
- Negotiate and draft a wide variety of legal documents
- Conducted probates for simple and complex estates
- Reviewed and drafted homeowner's association documents
- Advised and completed legal documentation for marital dissolution proceedings
- Participated in mediations as both an advocate and mediator

Mediator, King County Small Claims Court 2008-2010

- Adjudicated small claims cases on a pro bono basis after completing clinical training in mediation

Writer and Editor

I have two decades of experience researching, writing, editing, and project managing print and online content, including books, users' guides and other UX publications, employee/internal education, FAQs, marketing materials, emails, blog posts and other web site content, social media, and interviews. Organizations for whom I have written, edited, and managed projects include:

- SuperLawyers 2018-present
  - Wrote and edited print and online interviews and other legal articles
- New Day Cooperative 2021-2022
  - Wrote and edited email marketing copy and produced social media
- Drift Power 2017-2018
  - Wrote and edited marketing and educational materials for email and blog
- King County Clerk's Office 2010-2011
  - Researched, wrote, edited, and produced educational web site content
- Children's Hospital and Regional Medical Center 2003-2004
  - Wrote and edited marketing and educational content for web site rebrand
- Microsoft Corporation (as a contractor and a vendor) 1999-2002
  - Researched and wrote user's guides, educational content, and internal communications; project managed, wrote, and edited online content for various internal and external web sites

Researcher 2008-2011

I have conducted legal research and produced diverse written documentation on an array of topics, including: U.S. and Washington State land use policy and statutes; professional ethics; international pediatric bioethics; land use laws and policies in, e.g., Kenya, Ethiopia, India, and Afghanistan; women's rights; and human rights. I have also conducted international compliance reviews. I have conducted research and written and edited publications for organizations including:

- Expeditors International, King County Prosecutor's Office, The Washington State Bar Association, Professor and the Honorable Justice Joel Ngugi, Rural Development Institute (Landesa), and the Irish Centre for Human Rights (William H. Sampson Fellow)

Education

University of Washington School of Law | JD and LLM, 2010
Seattle University | Bachelor of Arts, Philosophy, 2006
Eastern Washington University | Bachelor of Arts, Psychology, 2016

Community and Volunteer Affiliations

Behind a Door Substack Newsletter (Founder, Editor) 2020-Present
Social Justice Syllabus Book Club, Third Place Books (Founder, Host, Reading List Creator) 2017-2022
Washington Talking Book and Braille Library (Audiobook Narrator) 2013-2022

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

(360) 332-7000
(360) 384-6400
(360) 332-6677
WhatcomLaw.com

July 31, 2025

Attn: WSBA President Anjilvel
Washington State Bar Association
1325 Fourth Ave., Suite 600
Seattle, WA 98101-2539

Transmitted by e-mail: barleaders@wsba.org

***re*: WSBA's Oath Review & Drafting Taskforce, Appointment**

Dear President Anjilvel and Board of Governors:

It is with great sincerity that I submit this application letter, along with my résumé, to you for your consideration in appointment of my person to the new Oath Review & Drafting Taskforce. I am seeking appointment as Chair of the committee.

I am heartened to see the WSBA tackle this issue; while I have long thought the oath's structure and nature were less than ideal, as the primary organizer of the Whatcom County's Law Day event and oath re-taking, I was chagrined to see even experienced judges and attorneys stumble over the oath. After that event, I did a survey of the oaths of a number of other states and almost universally found them to be short, understandable, meaningful, and to the point. I see no reason that we as an association cannot achieve the same in our state by making reasonable recommendations that we could persuade the Supreme Court to adopt.

Oaths have and should have meaning, but to be meaningful they should be understood and embraced. Our current oath is not conducive to either easy understanding or embracement by many in that regard.

I would be very interested in chairing this committee and enabling the staff and the volunteers working on this project to achieve an end product that both the Board of Governors and the Supreme Court will endorse. However, I will be out of the country from September 12th until October 10, 2025.

I believe that our primary duty as officers of the court, and in the continued service of our state and country, should be ensuring access to impartial justice for all people, and, as leaders of the WSBA, creating an environment that empowers our members to create that access. Part of protecting such access to justice is warranting that our leadership contains diverse perspectives and experiences, including in our rule making bodies. As a member of two different minority demographics, I came to rural Whatcom County as an attorney without any funds or close social contacts. I am proud to have become established as a respected leader in civil society and the legal community, while bringing an unfamiliar perspective. And while I believe that does have value, and I do believe having that representation on this committee would be particularly meaningful for many members of our association, I also bring a plethora of diverse background experiences and perspectives that one cannot glean from mere appearance, including leadership in the WSBA and experience working with the Supreme Court to move proposals into adoption.

I believe you will find confirmed in your investigation that I have led a life committed to serving my community and my country, and this position is an excellent way I can harness my specific leadership experience, while still being of service to the WSBA. It would be a great honor to use the connections I have built with the BoG and the Supreme Court to support the review of our oath.

Please find enclosed as requested: a résumé outlining my professional and personal experiences.

Thank you for your time and consideration.

Sincerely,



Rajeev D. Majumdar

Attachments (1)
RDM/jra

Rajeev D. Majumdar

[redacted] Blaine, WA [redacted]
[redacted]
rajeev@whatcomlaw.com

EDUCATION:

Passed exams & admitted to ***Tulalip Indian Nation (#A0131)*** and the ***Washington State Bars (#39753)***; admitted without exam to ***Lummi Indian Nation, Nooksack Indian Nation, Pala Band of Mission Indians, Swinomish Nation,*** and ***Federal Western District of Washington Bars***.

Juris Doctorate –cum laude**,** Seattle University, May 2007.
Associate Editor of the *Seattle University Law Review*; Teaching Assistant for Property Law (2005-2007).
Master's Degree in International Affairs, University of Washington, June 2004.
Master's Degree in Public Administration, University of Washington, June 2004.
Bachelor of Science in Biology and Philosophy, with a minor in Chemistry, Albertson College of Idaho, June 1999.

HONORS and ACHIEVEMENTS:

- Graduate of the National Judicial College's Judicial Academy Bootcamp (**2021**)
- William Randolph Hearst Foundation Scholarship to the National Judicial Academy (**2021**)
- President's Award from Washington State Bar Association (**2021**)
- Recognized by LAW Advocates for Outstanding Service (**2021**)
- Fellow of the American Bar Foundation (**2020- present**)
- Fellow of the Washington Judicial Institute (**2019**)
- Local Hero Award from Washington State Bar Association (**2015**)
- Graduate of the Washington State Bar Association's Washington Leadership Initiative (**2015**)
- Graduate of The National Institute on the Prosecution of Domestic Violence (**2013**)
- *Pro Bono* Public Service Commendations from Washington State Bar Association (**2010, 2012- 24**)
- Joint Acknowledgement for *pro bono* legal services provided to the victims of Hurricanes Katrina and Rita, from the Supreme Court of Louisiana and the Louisiana Bar Association (**2007**)

COMMUNITY INVOLVEMENT:

Prior Service

- Board Member of Mount Baker Foundation, funding long-term community development projects (**2021- 25**)
- Board Member of Sun Community Services, providing transitional housing in Whatcom County (**2010- 20**)
- Board Member of Washington State Board for Judicial Administration (**2019- 20**)
- Board Member for Northwest Youth Services, providing resources to at-risk youth (**2013- 19**)
- *Pro-bono* research on Federal legislation for the Indian Institute of Estate Planning and Probate (**2007- 08**)
- *Pro-bono* Expert Witness in custody disputes and family law matters, regarding South Asian culture (**2006- 10**)
- Volunteered at NOLAC and the Pro Bono Project in New Orleans to help Hurricane Katrina victims (**2006**)
- President of Seattle University School of Law's South Asian Law Student Association (**2006- 07**)
- Board Member of the UW Jackson School of Intl. Studies Alumni Association (**2004- 06**)

Current

- Eagle Scout (**1992- present**)
- Endowment for Equal Justice, Board Member (**2022- present**)
- Washington State Bar Foundation, Trustee (**2019- present**)
- Washington Leadership Institute, Board Member (**2019- present**)
- National Conference of Bar Presidents, Member (**2018- present**)
    - Diversity, Equity, and Inclusion Committee (**2020- 22**); Finance Committee (**2022- 24**); Communications Committee (**2024- present**)
- LAW Advocates, providing civil legal assistance to the indigent
    - Fundraising Committee (**2024- present**)
    - Elected Chair (**2015- 16)**
    - Served as Interim Executive Director (**2015**)
    - Board Member (**2012- 21**)
    - *Pro-bono* attorney for individual clients and at LAW Advocates clinics for the indigent (**2008- present**)

Bar Associations

- Skagit County Bar Association, Member (**2021- present**)
- LGBT Bar Association of Washington (QLAW), Member (**2018- present**)
- South Asia Bar Association of Washington, Member (**2017- present**)
- Washington State Municipal Attorneys Association, Member (**2014- present**)
- American Bar Association, Member (**2010- present**)
    - Delegate to the ABA House of Delegates (**2020- present**)
- Whatcom County Bar Association, Member (**2008- present**)
    - Editor of the Whatcom County Bar Journal (**2010- 23**)
    - Bylaw Committee (**2016- 17**); Court Efficiency Committee (**2010**)
- Washington State Bar Association, Member (**2007- present**)
    - Elected President, and served as President-elect and Immediate Past President (**2018- 21**)
    - Elected Governor representing Congressional District 2 on the Board of Governors, (**2016- 18**)
    - Election Board (**2024- present**)
    - Long Range Planning Council (**2021- present**)
    - Diversity Committee (**2016- 18**)
    - CLE Committee of the Washington Young Lawyers Division (**2010- 12**)

CURRENT EMPLOYMENT:

Whatcom Law Group, P.S. - Attorney, Blaine, WA (since **2008**, managing partner since **2019**)

- Supervise nine employees.
- Manage a broad litigation practice with emphasis on general civil litigation.
- Manage a thriving real property, business formation, and transactional practice.
- Cultivated broad clientele with additional focus on Canadian, Indian, Native, and Persian communities.

WWU – Adjunct Professor, Bellingham, WA (**2015- 18, 2021- present**)

- Responsible for teaching "Law of Commercial Transactions" a 400 level Common Law and UCC contracts course at the College of Business and Economics.
- Responsible for teaching "Rights, Liberties, and Justice in America," a 300 level constitutional and civil rights course at Fairhaven College (2015-2018).

City of Blaine – Prosecuting Attorney, Blaine, WA (since **2011**)

- Responsible for filing charges and prosecuting criminal, civil infraction, appellate, and code enforcement cases.
- Providing review and advice to the police department, city manager, and city council on questions of law, including ordinance revision.

City of Bellingham – Special Prosecuting Attorney, Bellingham, WA (since **2014**)

- Developed a Wellness Court for Mental Health as part of a team of experts and professionals.
- Responsible for representing the City of Bellingham in criminal mental health diversion in Wellness Court, and further developing that court.
- Responsible for representing the City of Bellingham in attorney represented contested traffic cases, as well as providing review and advice to the police department's traffic unit.
- Responsible for representing the City of Bellingham in code enforcement prosecutions and appeals.

JUDICIAL ROLES:

Hearing Examiner Positions

- Responsible for performing the judicial duties of the Hearing Examiner, for land use and other matters.
- Responsible for providing feedback on laws, rules, and procedures to the executive branch.
    - **Skagit County – Hearing Examiner**, Mount Vernon, WA (**since 2024**)
    - **Whatcom County – Hearing Examiner**, Bellingham, WA (**since 2023**, *Pro tem* from **2019- 23**)
    - **Island County – Hearing Examiner**, Coupeville, WA (**since 2023**, *Pro tem* from **2019- 22**)
    - **City of Bellingham – Conflict Hearing Examiner**, Bellingham, WA (**since 2023**)
    - **City of Ferndale - Hearing Examiner**, Ferndale, WA (**since 2023**, *Pro tem* from **2019- 23**)
    - **City of Blaine - Hearing Examiner**, Blaine, WA (**2021- 24**)
    - **City of Lynden - Hearing Examiner**, Lynden, WA (**since 2021**)
    - **City of Oak Harbor– *Pro-tem* Hearing Examiner**, Oak Harbor, WA (**2018- 19**)

Tribal

- **Nooksack Court of Appeals – Chief Appellate Court Judge**, Deming, WA (**since 2023**)

- Responsible for the administrative duties of the appellate court, including picking panels, fee decisions, acceptance of appeals and setting bail pending appeal.
- Responsible for *en banc* reviews and appeals from the trial court.

- **Nooksack Court of Appeals – Appellate Court Judge**, Deming, WA (**2019- 23**)
  - Responsible for *en banc* reviews and appeals from the trial court.
- **Nooksack Tribal Court – Judge *Pro Tem***, Deming, WA (**since 2018**)
  - Responsible for performing the judicial duties of the tribal court in both civil and criminal matters.

State & Municipal

- Responsible for performing the judicial duties for a broad range of civil and criminal matters.
- Acting as a Special Master for *in camera* evidentiary review.
  - **Whatcom County Superior Court – Commissioner *Pro Tem*,** Bellingham, WA (**2013- 16, since 2023**)
  - **Whatcom County District Court – Judge *Pro Tem***, Bellingham, WA (**since 2022**)
  - **Everson Municipal Court – Presiding Judge *Pro Tem***, Everson, WA (**since 2023**)
  - **Lynden Municipal Court – Judge *Pro Tem***, Lynden, WA (**since 2023**)
  - **Sumas Municipal Court – Judge *Pro Tem***, Sumas, WA (**2018**)
  - **Blaine Municipal Court – Judge *Pro Tem***, Blaine, WA (**2010**)

PUBLICATIONS:

Washington State Court Special Immigrant Juvenile Status Bench Book and Resource Guide.

- Co-authored through Washington Leadership Initiative in response to a statewide need identified by judicial officers who requested an SIJS Bench Book to educate judiciary (**2015**).

The Underutilized Sovereign Right to Eminent Domain on Reservation Land: A Primer for Tribes.

- Awarded the Viola Spencer Memorial Award for Legal Writing in Indian Law (**2007**).
- Selected to be published in 4 UCLA INDIGENOUS PEOPLE'S J. L. CULTURE & RESISTANCE 1 (**2008**), but journal was terminated.

Racially Restrictive Covenants in the State of Washington: A Primer for Practitioners.

- Published in 30 SEATTLE U. L. REV. 4 (**2007**).

PRIOR WORK EXPERIENCE:

WA State DSHS, Division of Child Support's Hearings Unit – Claims Officer, Seattle, WA (**2008**)

- Facilitated administrative child support and criminal contempt proceedings, as well as supporting Claims Officers and Support Enforcement Officers in extracting child support and arrears owed to the State, and audited cases with excessive outstanding arrears with little probability of collection for write-off.
- Developed and analyze a database of over 2300 individuals currently in contempt for cost-benefit and policy analysis with regards to pursuing criminal contempt remedies.

National Bureau of Asian Research (NBR) – Fellow, Seattle, WA (**2003- 04**)

- Tracked the development of conventional military power and policy, as well as the proliferation of Weapons of Mass Destruction (WMD) and using this information to update and maintain the Strategic Asia Database, which details the state of affairs in Asia at the time.
- Provided research support to the various authors contributing to the annual journal, *Strategic Asia*, and individual analysis publications put out by NBR.
- Developed a distribution plan, targeting key policy makers in government and the private sector as the recipients of policy reports generated by NBR.

National Nuclear Security Administration – Graduate Resident, Washington D.C. (**2001- 02)**

- Primary responsibilities included policy construction and analysis of issues related to the nuclear fuel cycle and WMD: understanding their construction and providing advice on the wide array of national and foreign technical means that can be brought to bear on national security dilemmas.
- Program Management of projects relevant to national security interests; involved in a project that required thorough study for modifying technical and legal protocols between the USA and foreign nations.
- Participated in interagency working groups with Depts. of Defense, Energy, and State. Served as the liaison from NA-22 to DOE Office of Science's Office of Nuclear & High-Energy Physics.
- Conducted extensive policy analysis of the new strategic outlook of national security priorities to combat global terrorism and technical implications, as derived from the President's directives following the events of Sept. 11th.

SCHOOL OF LAW
UNIVERSITY of WASHINGTON

Monte Mills
Director, Native American Law Center
Charles I. Stone Professor of Law
University of Washington School of Law
(206) 616-3482 | mtmills@uw.edu

August 1, 2025
August 1, 2025

Oath Review and Drafting Taskforce
Washington State Bar Association
Via email only: barleaders@wsba.org

Re: Statement of Interest.

Dear President Anjilvel and members of the Taskforce:

I write to express my interest in serving on the Oath Review and Drafting Taskforce. As a law professor responsible for preparing the next generation of lawyers who will be taking the oath, I am keenly aware of the unique obligations that each legal professional assumes upon being sworn in to the State Bar. Therefore, I believe I would provide a unique perspective on the Taskforce and can also assist in seeking and ensuring input from the legal education community.

As you may know, with the recent adoption of new accreditation standards, the legal academy has begun to focus on the need to help develop each student's professional identity. This work has been of deep interest to me in my teaching, research, and scholarship, especially as it relates to the shortcomings of historical conceptions of what it means to be a lawyer and who has typically filled that role. Though the importance and value of the Oath of Admission go well beyond these considerations, I believe they are critical to ensuring our profession welcomes and supports all who can and are eligible to enter it. As made clear by the Rules of Professional Conduct, we are public citizens with a "special responsibility" for the quality of justice, and those commitments should guide all aspects of our work.

In addition to my efforts with regard to professional identity development, I have also spent my career working on behalf of Native Nations and their sovereign and other rights. This work has directly impacted my perspective on the role of the law, legal system, and legal professionals. With regard to the Oath of Admission, for example, I believe it is worth noting that its origins in the establishment of the Territory as well as its adoption in 1917 both align with eras in which those in positions of authority were excluding—if not outright denying—the existence and status of Native Nations within what is now the State of Washington.[1] While considering that timing may not dictate changes to the oath, the Taskforce should be open to exploring the various interests, perspectives, and identities that should be considered when and if a new Oath is drafted.

[1] *See*, *e.g.*, State v. Towessnute, 89 Wash. 478, 154 P. 805 (1916) (upholding the conviction of a member of the Yakama Nation for exercising treaty reserved fishing rights), *mandate recalled and opinion vacated* 197 Wash.2d 574 (2020).

In sum, I am interested in assisting the Taskforce in any capacity that may be useful and submit this statement of interests to express my desire to do so. I am sending my CV along with this statement. Please do not hesitate to contact me if you have any questions or would like to discuss my interest or CV in greater detail. Thank you in advance for your consideration.

Sincerely,



Monte Mills

Monte Mills (he/him)
Charles I. Stone Professor of Law
Director, Native American Law Center
University of Washington School of Law | William H. Gates Hall | Seattle, Washington 98195
206.616.3482 | mtmills@uw.edu | https://www.law.uw.edu/directory/faculty/mills-monte

EXPERIENCE

University of Washington School of Law (Seattle, Washington), 2022-Present
Charles I. Stone Professor of Law, 2022-present; Director, Native American Law Center, 2022-Present

Awards and Honors:
Mentoring in the Legal Academy Award, AALS Section on Indian Nations and Indigenous Peoples, 2024

Courses Taught:
American Indian and Tribal Law: American Indian Law; Indigenous Economic Development
Other Courses: Water Law (co-taught); Property (required 1L course); Land, American Culture, and the Law

Co-Curricular Activities:
Co-Advisor, Native American Law Student Association (NALSA); Co-Coach, NALSA Moot Court Competition team; Board member, Washington Law Review Association, Gates Public Service Advisory Board

Stanford Law School (Palo Alto, California), May 1-31, 2024
Visiting Professor of Law

Courses Taught:
Environmental Justice in Indian Country (Spring term 2023-24)

Alexander Blewett III School of Law at the University of Montana (Missoula, Montana), 2015-2022
Acting Dean, Student Success, 2021-22; Professor with Tenure, 2021-2022; Associate Professor, 2018-2021; Co-Director/Director, Margery Hunter Brown Indian Law Clinic, 2015-2022; Interim Co-Director, Clinical Program, 2019-2020; Co-Director/Director, Summer Indian Law Program, 2016-2022; Assistant Professor, 2015-2018; Co-Clinic Director, Summer 2018, 2022

Awards & Honors:
Montana University System (MUS) Teaching Scholar (recognizing faculty whose teaching could serve as an exemplary model for others across the state), 2020-21
Margery Hunter Brown Faculty Merit Award (exemplifying the spirit of professionalism and professorial qualities for which Margery Hunter Brown was so well known), 2016, 2019
Law School Merit Award (for exemplary contributions to the School of Law), 2020

Courses Taught:
American Indian and Tribal Law: Federal Indian Law: American Indian Natural Resources Law; Economic Development in Indian Country; Advanced Problems in Federal Indian Law; Indigenous

Cultural Preservation; Energy in Indian Country; Tribal Sovereignty, Self-Determination, and Economic Development in Montana (Field Course); The Law of People and Place (co-taught Field Course); Tribal-State Relations; Tribal Law Advocacy (co-taught)
Other Courses: Federal Public Lands and Natural Resources Law; Race, Racism & American Law (co-taught); Employment Law

Co-Curricular Activities:
Co-Advisor, Public Lands & Resources Law Review; Co-Advisor/Advisor, Native American Law Student Association (NALSA); Co-Coach/Coach, NALSA Moot Court Competition teams; Co-Coach, National Cultural Heritage Moot Court Competition teams

Southern Ute Indian Tribe (Ignacio, Colorado)
Director, Legal Department, 2005-2015

SELECTED PUBLICATIONS

BOOKS

A THIRD WAY: DECOLONIZING THE LAWS OF INDIGENOUS CULTURAL PROTECTION, with Hillary M. Hoffmann (Cambridge University Press, July 2020), https://www.cambridge.org/core/books/third-way/307B5008C1AC8C0624D0A90DE7EE03FB.

TREATISES

Executive Editor, COHEN'S HANDBOOK OF FEDERAL INDIAN LAW (Nell Jessup Newton and Kevin Washburn, eds., 2024).

Contributing Author, ALASKA NATIVES AND AMERICAN LAWS (David S. Case and David A. Voluck, 4th ed. forthcoming).

TEXTBOOKS

NATIVE AMERICAN NATURAL RESOURCES LAW, with Michael C. Blumm & Elizabeth Ann Kronk Warner (Carolina Academic Press 5th ed. 2023).

AMERICAN INDIAN LAW: CASES AND COMMENTARY, with Robert T. Anderson, Sarah A. Krakoff, and Kevin K. Washburn (West Academic 5th ed. forthcoming 2025).

BOOK CHAPTERS

Preparing Students for the Profession We Have or the Profession We Need? Supporting Students to Further Their Antiracist Professional Identity in Practice, with Andrew King-Ries, *in* BUILDING AN ANTI-RACIST LAW SCHOOL – VOLUME SEVEN (Danielle Conway, et al. eds. forthcoming).

Developing Antiracist Professional Identity Through Use of Racial Identity Development Models, with Andrew King-Ries, *in* BUILDING AN ANTI-RACIST LAW SCHOOL – VOLUME FIVE (Danielle Conway, et al. eds. forthcoming).

Beyond Current Boundaries: Disrupting Historical Legacies to Re-Indigenize the Crown of the Continent, with Kekek Stark, *in* TOMORROW'S FUTURE OF THE AMERICAN WEST (Robert Frodeman, Luther Propst, and Evelyn Brister, eds., Univ. of Utah Press 2024).

Administrative Sovereignty and Tribal Governance, with Kekek Stark, *in* UNTOLD CASE STUDIES IN PUBLIC ADMINISTRATION: DOCUMENTING THE VOICES OF PUBLIC SERVICE (Sara Rinfret, ed., Routledge 2023).

Starting at the Start: Integrating Race and Reflection for an Antiracist Approach to Professional Identity Development in the First Year Curriculum, with Eduardo R.C. Capulong and Andrew King-Ries, *in* INTEGRATING DOCTRINE AND DIVERSITY: INCLUSION AND EQUITY IN THE LAW SCHOOL CLASSROOM (Nicole P. Dyszlewski, et al., eds. Carolina Academic Press 2021).

LAW REVIEW ARTICLES

Democratic Lawyering: Upending the "Hidden Curriculum" to Prepare New Lawyers for a New World, with Eduardo R.C. Capulong and Andrew King-Ries, 2 J. LAW TEACHING AND LEARNING 181 (forthcoming 2025).

The Supreme Court's Old Habits in a New Era? Native Nations, Statehood, and an Indigenous-led Future for Natural Resources, 77 STANFORD L. REV. __ (forthcoming 2025) (invited symposium contribution).

Planning a New Paradigm; Federal Public Land Planning and Tribal Co-Stewardship, with Dr. Martin Nie, 36 COLO. ENVTL. L. J. 1 (forthcoming 2025).

(Some) Landback, Sort of: The Transfer of Federal Public Lands to Indian Tribes since 1970, with Audrey Glendenning and Dr. Martin Nie, 63 NAT. RES. J. 200 (2023), https://digitalrepository.unm.edu/cgi/viewcontent.cgi?article=4142&context=nrj.

Re-Indigenizing Yellowstone, with Kekek Stark, Autumn Bernhardt, and Jason Robison, 22 WYO. L. REV. 397 (2022), https://scholarship.law.uwyo.edu/wlr/vol22/iss2/7/.

Bridges to a New Era Part 2: A Report on the Past, Present, and Potential Future of Tribal Co-Management on Federal Lands in Alaska, with Dr. Martin Nie, Professor of Natural Resources Policy and Director, Bolle Center for People and Forests in the W.A Franke College of Forestry and Conservation, University of Montana, 46 COLUM. J. ENVTL. L. 176 (2022), https://journals.library.columbia.edu/index.php/cjel/article/view/9477/4841.

Bridges to a New Era: A Report on the Past, Present, and Potential Future of Tribal Co-Management on Federal Public Lands, with Dr. Martin Nie, Professor of Natural Resources Policy and Director, Bolle Center for People and Forests in the W.A Franke College of Forestry and Conservation, University of Montana, 44 PUB. LAND & RES. L. REV. 49 (2021), https://scholarworks.umt.edu/plrlr/vol44/iss1/2/.

Antiracism, Reflection, and Professional Identity, with Eduardo R.C. Capulong and Andrew King-Ries, 18 HASTINGS RACE AND POVERTY L. J. 3 (Winter 2021), https://repository.uchastings.edu/hastings_race_poverty_law_journal/vol18/iss1/3/.

Beyond The Belloni Decision: Sohappy v. Smith *and the Modern Era of Tribal Treaty Rights*, 50 ENVTL. LAW 387 (2020), https://law.lclark.edu/law_reviews/environmental_law/past_issues/volume_50/50-2/.

'Race, Racism, and American Law': A Seminar from the Indigenous, Black, and Immigrant Legal Perspectives, with Eduardo R.C. Capulong and Andrew King-Ries, 21 SCHOLAR 1 (2019), https://commons.stmarytx.edu/thescholar/vol21/iss1/1/.

Current Developments in Indian Water Law and Treaty Rights: Old Promises, Recent Challenges, and the Potential for a New Future, 64 ROCKY MT. MIN. L. INST. 9-1 (2018).

Beyond a Zero-Sum Federal Trust Responsibility: Lessons from Federal Indian Energy Policy, AM. IND. L. J., VOL. 6, ISS. 1, ART. 2 (2017), https://digitalcommons.law.seattleu.edu/ailj/vol6/iss1/2/.

Foreword: A 'Coyote Warrior' and the 'Great Paradoxes,' The Scholarship of Professor Raymond Cross, PUB. LAND & RES. L. REV. SPECIAL ISSUE 1 (2017), https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3092292.

What Should Tribes Expect from Federal Regulations? The Bureau of Land Management's Fracking Rule and the Problems with Treating Indian and Federal Lands Identically, 37 PUB. LAND & RES. L. REV. 1 (2016), http://scholarship.law.umt.edu/plrlr/vol37/iss1/5/.

AMICUS BRIEFS

Amicus Brief of Native Nations in Montana, Kathryn Shanley, and Denise Juneau (co-authored), *Rikky Held, et al. v. State of Montana*, No. DA 23-0575 (Montana Supreme Court March 22, 2024)

Brief of Tribal Nations and Indian Organizations as *Amici Curiae* in Support of the Navajo Nation (with Professors Heather Whiteman Runs Him and Dylan Hedden-Nicely), *State of Arizona, et al. v. Navajo Nation*, *et al.*, and *U.S. Dep't. of the Interior, et al. v. Navajo Nation*, et al., Nos. 21-1484 & 22-51, (U.S. Supreme Court Feb. 8, 2023).

Brief of *Amicus Curiae* Law Professors in Support of Plaintiff/Appellant and Reversal of the District Court's Order, *Navajo Nation v. United States Dept. of the Interior, et al.*, No. 19-17088 (9th Cir. March 4, 2020).

Brief of *Amici Curiae* Indian Law Professors in Support of Petitioner, *Herrera* v. *Wyoming*, No. 17-532, (U.S. Supreme Court Sept. 11, 2018), *reprinted in* 40 PUB. LAND & RESOURCES L. REV. 15 (2019).

Brief of *Amicus Curiae* Law Professors in Support of Plaintiff/Appellee and Affirmance of the District Court's Order, *Agua Caliente Band of Cahuilla Indians and United States v. Coachella Valley Water District, et al.*, No. 15-55896 (9th Cir. Dec. 18, 2016).

ADDITIONAL PUBLICATIONS

Briefing Paper on Regulation of the Environment and Natural Resources, *McGirt* and the Work of Rebuilding of Tribal Nations; A Tribal Nation Building Colloquium sponsored by Harvard Project on Indian Economic Development and the University of Oklahoma Native Nations Center, https://sites.google.com/g.harvard.edu/mcgirt-rebuilding-nations/mcgirt-issue-areas/mcgirt-regulation-

of-environment-natural-resources

Briefing Paper on Cultural Resources, *McGirt* and the Work of Rebuilding of Tribal Nations; A Tribal Nation Building Colloquium sponsored by Harvard Project on Indian Economic Development and the University of Oklahoma Native Nations Center, https://sites.google.com/g.harvard.edu/mcgirt-rebuilding-nations/mcgirt-issue-areas/mcgirt-cultural-resources

The Legacy of Federal Control in Indian Country, Regulatory Review (U.Penn. Program on Regulation), March 16, 2021, https://www.theregreview.org/2021/03/16/mills-legacy-federal-control-indian-country/

The Civil Jurisdictional Landscape in Eastern Oklahoma Post McGirt v. Oklahoma (with Prof. Dylan R. Hedden-Nicely, University of Idaho School of Law), Natural Resources Law Insights, Rocky Mtn. Min. Law Found. (Aug. 2020), https://www.rmmlf.org/-/media/Files/natural-resources-law-network/august-2020/the-civil-jurisdiction-landscape-in-eastern-oklahoma.pdf?la=en

Beyond Constitutional Frontiers: Tribal Rights, Resources, and Reform, Proceedings of the 27th Fall Conference of the American Bar Association's Section on the Environment and Energy Resources, https://scholarship.law.umt.edu/faculty_barjournals/149/

Herrera v. Wyoming*: A New Trend for Indian Law?*, GEO. WASH. L. REV. ON THE DOCKET (June 11, 2019), https://www.gwlr.org/herrera-v-wyoming-a-new-trend-for-indian-law

Bigotry, Ignorance, and High School Basketball in Montana, HIGH COUNTRY NEWS (March 27, 2019), https://www.hcn.org/articles/opinion-bigotry-ignorance-and-high-school-basketball-in-montana

Report from the Royalty Policy Committee: The Past, Present, and Future of the Royalty Policy Committee, in FEDERAL AND INDIAN OIL & GAS ROYALTY VALUATION AND MANAGEMENT 7-1 (Rocky Mt. Min. L. Fdn. 2018)

Supreme Court Tests Weight of Old Native American Treaties in 21st Century, THE CONVERSATION (April 13, 2018), https://theconversation.com/supreme-court-case-tests-weight-of-old-native-american-treaties-in-21st-century-93194

Monumental Battles - - Protecting Sacred Tribal Lands, BILLINGS GAZETTE (March 19, 2018), http://billingsgazette.com/opinion/columnists/guest-view-monumental-battles----protecting-sacred-tribal/article_9c3134b5-f244-510b-8fc8-66ad9b6f9737.html

Finding the 'Founding Fathers' at Bears Ears and Beyond, Berkley Forum (Feb. 20, 2018), https://berkleycenter.georgetown.edu/forum/using-a-religious-freedom-framework-to-protect-the-rights-of-native-americans/responses/finding-the-founding-fathers-at-bears-ears-and-beyond

Why Indian Country? An Introduction to the Indian Law Landscape, in INDIAN LAW AND NATURAL RESOURCES: THE BASICS AND BEYOND 1-1 (Rocky Mt. Min. L. Fdn. 2017)

Trump's Plan to Dismantle National Monuments Comes with Steep Cultural and Ecological Costs (with Profs. Sandi Zellmer and Michelle Bryan), The Conversation (May 3, 2017), https://theconversation.com/trumps-plan-to-dismantle-national-monuments-comes-with-steep-cultural-and-ecological-costs-77075

Serving the National Interest? Tribal Rights and Federal Obligations from Dakota Access to Keystone XL, The Jurist (Apr. 12, 2017), http://www.jurist.org/forum/2017/04/Monte-Mills-keystone-xl.php

How Will Native Tribes Fight the Dakota Access Pipeline in Court, The Conversation (Feb. 14, 2017), http://theconversation.com/how-will-native-tribes-fight-the-dakota-access-pipeline-in-court-72839

New Approaches to Energy Development in Indian Country: The Trust Relationship and Tribal Self-Determination at (Yet Another) Crossroads, 63 Fed. Law., April 2016, at 50, http://scholarship.law.umt.edu/faculty_barjournals/114/

SELECTED PRESENTATIONS AND PANELS

Centering the 'Real' Indian law: The Role (and Burdens) of Tribal Courts, WSBA Annual Indian Law Section CLE, May 15, 2025

Working with the Original Sovereigns; The Role of (Student) Lawyers and Clinical Teachers in Tribal, Indian, and Native Hawaiian Law Clinics, AALS Clinical Conference, April 27, 2025

Tribal Treaty Fishing Rights, Committee Meeting #3, National Academies of Science, Engineering, and Medicine (NASEM) Ocean Studies Board/Transportation Research Board, April 22, 2025

Indian Law: Washington Tribal History & Law, with The Hon. Theresa Pouley, Washington Judicial Education: Water and Tribes, National Judicial College, March 17, 2025

Doctrines of Discovery and Prior Appropriation in the AI Age: Old Frontiers Made New Again, New Frontiers in Property, March 7, 2025

Tribal Interests in the Columbia, The Mighty Columbia Symposium, February 27, 2025

638 Agreements and Tribal Co-Stewardship, Annual Meeting, AALS Section on Indian Nations and Indigenous Peoples, January 9, 2025

The Courage to Change How We Educate the Next Generation: Democracy, Autocracy, and Professional Identity, AALS Associate Deans for Academic Affairs and Research and Clinical Legal Education Joint Program, January 8, 2025

LandBack and the Law, Maine Law Annual History and Indian Law Lecture, November 22, 2024

Indigenous Justice Training, workshop for ACLU Washington, November 15, 2024

Evolutions in Tribal Co-Stewardship (moderator), Martz Symposium on Public Lands, University of Colorado School of Law, October 4, 2024

Protected Wildlife and Project Development: Tribal Interests and Considerations Involving Protected Species, Foundation for Natural Resources and Energy Law Special Institute, October 4, 2024

50 Years of the Boldt Decision: History & Foundations, Washington Judicial Conference, September 30, 2024

The Future of Tribal Water Law: Protecting Tribal Sovereign Interests in Water, Tribal Water Law Conference, September 9, 2024

Arizona v. Navajo Nation, Dividing the Waters (National Judicial College), March 14, 2024

Tribes, Treaties, and Water, Whatcom County Water Law Adjudication CLE, January 9, 2024

Tribal Treaty Rights, Washington State Riparian Working Group Series 2: Meeting #4, December 1, 2023

Tribes, Treaties, Water, and the Challenges of Managing Shared Resources, State of Washington Office of the Attorney General Annual CLE, November 7, 2023

The Current State of Tribal Water Law: Ensuring a Future of Tribal Engagement, Tribal Water Law Conference, Santa Fe, New Mexico, November 6, 2023

The Four Corners of Indian Water Rights; Tribes, Treaties, and the Adjudication of Reserved Rights, American Water Resources Association 2023 Annual State Conference, Seattle, Washington, September 28, 2023

Federal Indian Law and Policy, Yale School of the Environment: Tribal Resources and Sovereignty Clinic, September 13, 2023

Arizona v. Navajo Nation, ABA Section of Environment, Energy, and Resources: Important Developments in Water Law, July 27, 2023

Critical Concerns in Indian Country: Arizona v. Navajo Nation*,* Montana State Bar Indian Law Section Annual CLE, April 21, 2023

Combating Climate Change and Increasing Tribal Co-Management, Federal Bar Association Indian Law Section Annual Conference, April 18, 2023

Stewart Udall and the Politics of Beauty, University of Washington School of Law, April 7, 2023

Tribal Co-Management of Federal Public Lands, Arizona Journal of Environmental Law and Policy Spring Symposium, April 7, 2023

Advancing and Expanding an American 30 by 30, 2023 J.B. & Maurice C. Shapiro Environmental Law Symposium, George Washington University, April 6, 2023

Restoring our Nation's Legacy: Native Nations, Co-Management, and the Future of Federal Public Lands, Case Western Reserve University School of Law, March 22, 2023

Foundations of Federal Indian law, Treaties, and Natural Resources, Washington State Courts Appellate Conference, March 27, 2023

From Aspiration to Implementation for Energy and Environmental Justice, 2023 Annual Meeting, Association of American Law Schools, January 4, 2023

Past and Future of Indian Law: Recent Supreme Court Decisions, Co-Management, and Off-Reservation Rights, Washington State Attorney General's Office CLE Seminar, Nov. 30, 2022

Integrating American Indian Law and Indigenous Identities, Integrating Doctrine and Diversity Speaker Series, Zoom webinar, October 19, 2022, https://youtu.be/GHZEN_O6JU4

Native Nations in a Time of Energy Transition, Seventh Annual SRP Sustainability Conference of American Legal Educators, Sandra Day O'Connor College of Law, Arizona State University, Phoenix, Arizona, May 13, 2022

Management of Sovereign Lands in the Era of Climate Change (moderator), ABA Section on Environment and Energy Resources (SEER) 51st Spring Conference, San Francisco, California, April 7, 2022

Recognizing and Honoring Tribal Leadership in Public Land Management, 75th Anniversary of the Bureau of Land Management (BLM), Sept. 23, 2021

The Future of Self-Governance: Tribal Co-Management of Public Lands, 2021 Tribal Self-Governance Conference, Self-Governance Communication and Education Tribal Consortium, Sept. 16, 2021

Race, Lawyering, and the Experiential Curriculum, Co-Organizer and Discussant, Association of American Law Schools (AALS), 2021 Annual Clinical Conference, April 28, 2021

Sovereignty and the Sacred: Past, Present, and Future, UCLA Emmet Institute Spring Symposium: Environmental Justice in the United States: Taking Stock under President Biden, April 26, 2021

Healthcare Sovereignty: The History, Context, and Challenges of Tribal Self-Determination, Healthcare Issues and Negotiating 638 Contracts, Indian Law Section, Montana State Bar, April 23, 2021

Powerful and Practical: The Emerging Meanings of McGirt, University of Oklahoma School of Law 2021 Oil and Gas, Natural Resources, and Energy Law Journal (ONE-J) Symposium: *McGirt* and Emerging Indian Country, April 2, 2021

Race, Sovereignty, and Native American Voting Rights in Montana, Montana Advisory Committee, U.S. Commission on Civil Rights, February 11, 2021

Race, Racism & the Language of Law School: Power of Words in Shaping Professional Identity, Co-organizer and Discussant, 2021 Annual Meeting of the Association of American Law Schools (AALS), January 8, 2021

Race, Federal Indian Policy and Access to Water, Dividing the Waters, National Judicial College, November 19, 2020

Developing Anti-Racist Professional Identities: Infusing Reflective Practice with Critical Race Consciousness, Northwest Clinical Law Conference, November 6, 2020

Briefing on Tribal Co-Management on Public Lands, webinar sponsored by Audubon and Center for American Progress, October 13, 2020

How Climate Change is Challenging Established Doctrine and What Tribes Can Do to Adapt, Ninth Annual Tribal Water Law Conference, September 14, 2020

Indian Law and Jurisdiction (in 45 Minutes), Montana Law Seminar for July 2020 Bar Examinees, July 30, 2020

Ending Erasure: Indigenous People and the Decolonization of our Legal System, Embedded Racism in the Law Panel Discussion Series, Vermont Law School, July 9, 2020, https://youtu.be/g2z0OI_aWRM

MEMBERSHIP & SERVICE

Planning Co-Chair, 46th Annual Indian Law Conference, Indian Law Section, Federal Bar Association (2021)

Chair, Association of American Law Schools Section on Indian Nations and Indigenous Peoples (2019)

Primary Member, Royalty Policy Committee, United States Department of the Interior (2017-2019)

Member, State bars of Washington, Colorado, and Montana, Federal bars of the U.S. Supreme Court, Ninth and Tenth Circuit Courts of Appeal, District Court of Colorado, Southern Ute Indian Tribal bar (inactive)

Professional Fellow, United States State Department, Young Southeast Asian Leadership Initiative Exchange Program (Cambodia 2017-18)

Board Member, Clark Fork Coalition, Missoula, Montana (2017-2022)

EDUCATION

University of Colorado School of Law (Boulder, Colorado)
J.D., 2003

Lewis & Clark College (Portland, Oregon)
B.A. Political Science, 1998

July 29, 2025

barleaders@wsba.org
Washington State Bar Association

Dear President Anjilvel and Board of Governors of the Washington State Bar Association:

I recently learned that on July 18, 2025, the Board of Governors of the Washington State Bar Association adopted a Charter to establish the Oath Review and Drafting Task Force. It is my understanding that the purpose of the task force is to evaluate whether WSBA should consider amendments to Washington State's APR 5 oath and make recommendations to the Washington Supreme Court that would update and improve the Oaths of legal professionals in the State of Washington. On May 1, 2025, I traveled to Olympia, Washington to stand in the Temple of Justice to retake my Oath along with dozens of other legal professionals from around the state. I recall thinking that some of the language in our Oath is timeless and should never change. We should always commit to supporting the constitution of the State of Washington and the Constitution of the United States. We should always abide by the Rules of Professional Conduct and maintain the respect due to the courts of justice and judicial officers. But, I feel other areas of our Oath could be clarified and updated. I write to express interest in serving on this task force and believe I qualify as an active WSBA member not currently serving on the Board of Governors and as a former member of the WSBA Board of Governors and WSBA officer. I also offer diversity in terms of geography, areas of practice and practice experience.

I have been a member of the Washington State Bar Association since 1996 and have spent much of the past 29 years working and living in Vancouver, Washington. I am currently a partner with Miller Nash in its Vancouver Washington office. In addition to my work as a full-time attorney, I have spent decades of my career volunteering my time and energy serving the Washington State Bar Association.

In 2003, I joined the WSBA's Legislative Committee (now known as the Legislative Review Committee). For more than twenty years, I spent countless hours serving on the WSBA's Legislative Review Committee as a member and eventually its Chair in 2017, 2018 and 2019.

In 2017, I was elected to the WSBA Board of Governors from Congressional District 3, Southwest Washington. From 2017 to 2021, I served on both the Legislative Review Committee and the Board of Governors Legislative Committee and served as Chair for both committees in 2018 and 2019. During my time on the WSBA Board of Governors I served as the WSBA's liaison to the Committee on Mission Performance; Committee on Professional Ethics; Corporate Counsel Section and the World Peace Through Law Section. I served as a trustee to the Washington State Bar Foundation from 2017 to 2020.

In 2018 I was elected by the WSBA Board of Governors to serve on the Washington Supreme Court Structures Workgroup Chaired by former Chief Justice Mary Fairhurst and was an officer of the Board of Governors in 2021 when the Board of Governors convened ETHOS, the work of the WSBA Board of Governors to Examine the Historical Organization and Structure of the Bar.

In 2019, I was elected President of the Washington State Bar Association for the 2020 to 2021 term. As president, I continued to serve as a member of both the Legislative Review Committee and the Board of Governors Legislative Committee. I also served as a non-voting member of the Administrative Office of the Courts during my term as president of the WSBA.

In 2021, I was appointed to be the WSBA's delegate to the Statute Law Committee; Code Revisor's Office and continue to serve on that committee.

In 2023, I was appointed by the Board of Governors to serve as a WSBA Delegate to the American Bar Association's House of Delegates and continue to serve as an ABA Delegate.

In 2024, I was invited to join the board of the Endowment for Equal Justice, Legal Foundation of Washington and continue to serve on that board.

Over the years I have chaired many task forces, committees and councils including the Washington State Bar Association's Long Range Strategic Planning Council; the Washington State Bar Association's TAXICAB Task Force, and the Washington State Bar Association's Committee to Investigate Alternatives to Mandatory Malpractice Insurance.

I believe my experience as a practicing attorney and in-depth knowledge of the WSBA and its resources, benefits and programs make me uniquely qualified to continue my volunteer work as a member of the Oath Review and Drafting Task Force. I believe the Oath that we all take as practicing legal professionals is important and meaningful and would benefit from an in-depth review. I would be honored if allowed to serve as one of its members.

Thank you for your consideration of my application.

Sincerely,

Kyle D. Sciuchetti

Kyle D. Sciuchetti **Kyle.s@millernash.com**

SUMMARY OF QUALIFICATIONS

I serve as outside counsel to many businesses throughout the Pacific Northwest. My practice includes civil litigation, with an emphasis in complex construction disputes and business disputes in Washington, Oregon and Idaho.

WORK EXPERIENCE

MILLER NASH LLP – Partner; Vancouver/Portland; 2019 to Present
- Advises businesses and manages the legal needs of a wide range of companies
- Significant experience representing construction professionals in business and litigation

BULLIVANT HOUSER BAILEY, PC - Attorney; Portland/Vancouver; 2007 to 2019
- Civil practice focusing on business in Washington, Oregon and Idaho
- Serves as outside counsel to businesses throughout Pacific Northwest
- Represents businesses in trial, arbitration, mediation and appeals

LANDYE BENNETT BLUMSTEIN, LLP - Attorney; Portland; 2003 to 2007
- Civil practice focused on business litigation, construction defect and products liability
- Counseled business clients in employment law, including employment and severance agreements
- Experienced in all levels of trial practice including motions practice, jury trials and appeals

HALL & HOLLAND - Attorney; Vancouver; 2001 to 2003
- Provided advice to business clients on real estate, contracts, lease agreements, corporate governance, purchase and sale agreements, employment litigation and other issues
- Negotiated use of U.S. Dept. of Energy power-line easement for operation of quarry conveyor

PUBLIC POWER COUNCIL, Inc. - Senior House Counsel; Portland; 1999 to 2001
- Represented Public Power Council in the United States Court of Appeals for the Ninth Circuit, U.S. district Court Western District of Washington and the U.S. District Court of Oregon
- Negotiated complex power sales agreements on behalf of member utilities
- Advised Executive Committee on wide range of issues including corporate structure, multi-million dollar purchase and sale agreements, litigation strategy and regulatory compliance

CITY of SPOKANE - Assistant City Attorney/Prosecutor; Spokane; 1997 to 1999
- Prosecuted jury and bench trials in district court for the City of Spokane
- Managed full docket of cases requiring daily appearances in court

WASHINGTON STATE LEGISLATURE - Code Reviser's Office; Olympia; 1997
- Drafted over 500 bills, amendments and resolutions during the 1997 legislative session
- Counseled elected officials and business representatives on legislation concerning business, sales, construction law, real property issues and other matters

BAR ADMISSIONS

Washington State Bar Association – 1996
Oregon State Bar Association – 1996
Idaho State Bar Association – 2015
United States District Court, Western District of Washington – 1999
United States District Court, Eastern District of Washington – 2006
United States District Court, District of Oregon – 2000
United States District Court, District of Idaho – 2015
United States Court of Appeals for the Ninth Circuit – 2000
United States Supreme Court – 2000

PROFESSIONAL ACTIVITIES & AWARDS

President, Washington State Bar Association – 2020 to 2021
Immediate Past President, Washington State Bar Association – 2021 to 2022
President-Elect, Washington State Bar Association – 2019 to 2020
Governor, District 3, Washington State Bar Association, Board of Governors – 2017 to 2020
Past President, Board Member Clark County Food Bank – 2007 to 2016
Board of Directors, Humane Society of Southwest Washington – 2006 to Present
Board Member, Clark County Animal Control Advisory Board – 2019 to 2024 (Chair 2022 to 2024)
Board Member, Endowment for Equal Justice, Legal Foundation of Washington – 2024 to Present
Board Member, Battle Ground Health Clinic – 2024 to Present
Washington State Bar Association Legislative Review Committee – 2003 to Present (Chair 2016, 2019)
Washington State Bar Association Legislative Committee; Board of Governors – 2017 (Chair 2018, 2019)
Washington State Bar Association, Long Range Strategic Planning Council – 2020 to Present (Chair 2021)
Washington State Bar Association, Taxicab Taskforce – 2020 to Present (Chair)
Washington State Bar Association, Cmte. To Investigate Alt. to Mand. Malpractice Ins. 2020 (Chair)
Washington State Bar Association, Bar Structures Workgroup – 2018 to 2019
Washington State Bar Association; Practice of Law Committee – 1998 to 2001, 2002 to 2003
Statute Law Committee, Washington State Legislature Code Reviser's Office – 2021 to Present
Trustee, Washington State Bar Foundation, Board of Trustees – 2017 to 2020
Washington State Bar Association Liaison to Committee on Mission Perform. & Rev. – 2017 to 2019
Washington State Bar Association Liaison to Committee on Professional Ethics – 2017 to 2020
Washington State Bar Association Liaison to Corporate Counsel Section – 2017 to 2020
Washington State Bar Association Liaison to World Peace Through Law Section – 2017 to 2020
Governor, District 8, Oregon State Bar – 2024 to Present
Oregon State Bar Public Affairs Committee – 2024 to Present
Oregon State Bar State Lawyers Assistance Committee – 2024 to Present
Oregon State Bar Construction Section Liaison – 2024
Oregon State Bar Corporate Counsel Section Liaison – 2024 to Present
Oregon State Bar Association, Corporate Counsel Section – 2000 to 2001
Metropolitan Business Association; Board of Directors – 2017 to Present
Certificate of Appreciation, Bonneville Power Administration – 1996
American Bar Association (ABA), 1994 to Present
ABA Fellow – 2020 to Present
ABA – Washington State Bar Association Delegate to ABA House of Delegates – 2023 to Present

PROFESSIONAL ACTIVITIES & AWARDS cont.

ABA – President/Representative, Lewis & Clark, Northwestern School of Law – 1995 to 1996
ABA 12th Circuit Lieutenant Governor, Public Interest Division – 1994 to 1995
ABA Membership Chair, Lewis & Clark, Northwestern School of Law – 1994 to 1995
Metropolitan Business Association, Hero Award - 2024
WSBA President's Award – 2023
WSBA Presidential Commendation – 2022
WSBA Dedicated Service Award – 2021
WSBA Distinguished Service Award for Service to the WSBA – 2020
Certificate of Appreciation, Bonneville Power Administration – 1996

EDUCATION

J.D. – Lewis & Clark College, Northwestern School of Law; Portland, Oregon – 1996
Dean's Fellowship/Scholarship awarded for academic achievement
B.A. – Political Science, University of Washington; Seattle, Washington – 1992
Academic Honors, University of Washington
B.A. – Psychology, University of Washington; Seattle, Washington – 1992
Psi Chi, National Psychology Honors Society

REPORTED CASES

Kaiser Aluminum & Chemical v. Bonneville Power Admin., 261 F.3d 843 (9th Cir. 2001).

Waxman v. Waxman & Assoc., 224 Or.App. 499, 198 P.3d 445 (2008).

Abraham v. T. Henry Const., Inc., 230 Or. App. 564, 217 P.3d 212 (2009)

Dear WSBA President Sunitha Anjilvel,

I am writing to express my interest in serving on the WSBA Oath Review and Drafting Task Force. I am currently fortunate enough to serve as a District Court judge for Clark County. Since being appointed to the bench in 2021, I've had the opportunity to swear in many new attorneys and have also given significant thought to the nature and content of the current oath. I served as the president of our local Inns of Court chapter from 2022-2024 and organized a year long examination of the history, meaning, and professional expectations of the current oath. As part of that project, I researched the origins of our oath and reviewed how it contrasted with the oaths of other jurisdictions. It would be a great honor to participate in a comprehensive review of the oath and to work collaboratively to ensure it advances the current and future goals of our legal community and the needs of the people we serve. I have previously served as a WSBA volunteer and would enjoy the opportunity to do so again. If there is any additional information I can provide in aid of this application, please let me know.

Sincerely,

James B. Smith
WSBA #35537

James B. Smith
Washington State Bar Association #35537
Phone: [redacted]
Email: [redacted]

JUDICIAL EXPERIENCE:

- District Court judge for Clark County. Appointed July 27, 2021. Elected, unopposed, to a four-year term on November 8, 2022. Current term of office expires January 4, 2027.

    - Presided over 42 criminal jury trials and 3 bench trials.
    - Managed high-volume criminal caseload, conducted small claims trials, and ruled on civil motions. Performed all duties of an elected District Court judge.

- Assistant presiding judge for Clark County District Court since 2023. Elected by fellow judges to serve in this role. Duties include coordinating policy and planning with the presiding judge and court administrator, acting as liaison with other organizations and courts, and other general leadership duties.

- Appointed as elected judge pro tem under AR 6 for Clark County Superior Court to preside over the Veterans Therapeutic Court since 2023. This is a joint felony/misdemeanor therapeutic court for veterans facing criminal charges.

EDUCATION:

- Graduate, ***Cum Laude,*** of the University of Mississippi School of Law (2004).
  J.D., 3.32 GPA. Class Rank: Top 20%.

- Graduate, ***Magna Cum Laude,*** of Mississippi State University (2001).
  B.A. in Sociology, 3.66 GPA.

TRIAL AND COURTROOM PRACTICE EXPERIENCE:

- Prosecuted hundreds of felony cases, primarily violent crimes.
- Regular court appearances, hearings, dockets, and complex motions practice in Clark County Superior Court.
- 123 felony trials, including 109 jury trials. 27 jury trials in Clark County Superior Court. 81 jury trials in Cowlitz County Superior Court. 1 jury trial in Wahkiakum County Superior Court.
- 6 homicide jury trials, 3 in Clark County Superior Court.
- 17 bench trials in Cowlitz County Superior Court, 1 bench trial in Clark County Superior Court.
- Recognized as Trial Attorney of the Year for 2018 by the Clark County Bar Association.

APPELLATE EXPERIENCE:

- Appellate counsel for over 60 appeals to the Washington Court of Appeals and the Washington Supreme Court.
- Presented oral argument in more than 15 cases before Divisions I and II of the Court of Appeals.
- Presented oral argument in 3 cases before the Washington Supreme Court.

LEGAL EMPLOYMENT HISTORY:

- Senior Deputy Prosecuting Attorney for Clark County (January 14, 2015 - August 8, 2021).
    - Assigned to the Major Crimes Unit from January 14, 2015 to July 15, 2019 prosecuting homicide, serious violent offenses, and sexual assaults.
    - Temporarily assigned as interim chief criminal deputy from January 1, 2019 to June 15, 2019. Assisted with directing and supervising the criminal division while continuing to prosecute

major cases.
    - Assigned as Team Leader for the Children's Justice Center from July 15, 2019 to August 8, 2021 prosecuting felony child abuse cases. In addition to personal caseload, supervised 3 deputy prosecutors, 3 paralegal staff, and co-supervised 5 victim advocates.

- Chief Criminal Deputy Prosecuting Attorney for Cowlitz County (September 1, 2013 - January 1, 2015).
    - Supervised and directed the Criminal Division of the Cowlitz County Prosecuting Attorney's Office, including 9 deputy prosecutors.
    - Prosecuted major cases.
    - Advised the elected Prosecuting Attorney on policy and personnel decisions.
    - Provided training to law enforcement.

- Deputy Prosecuting Attorney for Cowlitz County (August 15, 2005 - August 30, 2013).
    - Assigned to prosecute felonies in January of 2006. Handled a caseload of primarily violent offenses, sexual assault, child abuse, domestic violence, and elder abuse.
    - Assigned as liason to the Cowlitz County Drug Court program. Screened cases for entry into the program and attended weekly staffings, court sessions, and graduations. Attended the annual conference for the National Association of Drug Court Professionals several times.

- Law Clerk for Chelan County Superior Court, Wenatchee, WA (October 1, 2004 - August 5, 2005).
    - Assisted the 3 Superior Court judges with legal research and writing, including summary judgment motions in civil cases, sexually violent predator proceedings, and the litigation of the 2004 Washington gubernatorial election. Acted as bailiff for criminal and civil trials.

LAW SCHOOL WORK EXPERIENCE:

- Fall 2003 externship with the United States Attorney for Northern Mississippi, Oxford, MS.
    - Prepared an appellate brief submitted to the Fifth Circuit Court of Appeals.
    - Represented the government in a Social Security appeal before a United States Magistrate Judge.
- Summer 2003 internship with the Seattle City Attorney's Office, Criminal Division.
    - Represented the City of Seattle in criminal appeals to King County Superior Court.
- Participant in the Poverty Law Clinic as second-year law student.
    - Assisted local attorneys with housing, contract disputes, and restraining order cases.
- Summer 2004 internship with the Equal Employment Opportunity Commission's Memphis, TN office.
    - Assisted staff attorneys with case review and preparation, including prelitigation review of the employment practices of the AutoZone corporation.

PROFESSIONAL MEMBERSHIPS AND COMMITTEES:

- Clark County Bar Association (2015 - present).
    - Diversity, Equity, and Inclusion Subcommittee (2021 - present).
- Clark County Superior Court/District Court Diversity Committee (2021 - present).
- Clark County Judicial Mentorship Program presenter and mentor (2023).
- District and Municipal Court Judges Association (DMCJA) (2021- present).
    - Public Outreach subcommittee (2022 - present).
    - Legislative subcommittee (2022 - present).
- WSBA Rule of Law Ambassador (2025 - present).
- Clark County Courthouse Security Workgroup (2022 - present).
- The George and Donald Simpson Inn of Court (2018 – present).
    - Treasurer (2021 - 2022).

    - President (2022 - 2024).
- Clark County Mock Trial Committee (2016 - 2017).
- Clark County Superior Court Bench/Bar Committee (2018 - 2021).
- Criminal Docket Efficiency Workgroup (2019).
- WSBA Court Rules and Procedures Committee (2017 - 2021).
- WSBA Hearing Officer Panel (2019 - 2021).
- Clark County Prosecuting Attorney's Office Action and Reform Committee (ARC) (2020 - 2021).

CLE PRESENTATIONS:

- *Competency, Capacity, and Insanity* – CLE presentation sponsored by Clark County District Court Bench/Bar (June 15, 2017).
- *State v. Heidi Fero, Abusive Head Trauma Case Study* – CLE presentation sponsored by the Washington Association of Prosecuting Attorneys (September 27, 2017).
- *Direct Examination, Cross Examination, & Examination of Experts* – CLE presentation sponsored by the Clark County Bar Association (co-presenter with Jon McMullen, April 11, 2018).
- *State v. Brent Luyster Case Study* – CLE presentation sponsored by the Washington Association of Prosecuting Attorneys (April 25, 2019 and June 20, 2019).
- *Victim Advocacy in Child Homicide Cases* –CLE presentation sponsored by the Washington Association of Prosecuting Attorneys (October 23, 2020).
- *GR 37 Case Update and Trial Tips* – Panelist for CLE presentation sponsored by the Washington Association of Prosecuting Attorneys (April 23, 2021).
- *A View from the Bench* - CLE presentation sponsored by the Clark County Bar Association (co-presenter with Judge Robert Lewis, September 12, 2022).
- *Trial Skills Series – Practical Skills* - CLE presentation sponsored by the Clark County Bar Association (March 4, 2023).
- *GR 37 and Batson Challenges: Practical, Legal, and Ethical Consideration at Trial and Beyond* – CLE presentation sponsored by the Clark County Bar Association (co-presenter with Lauren Boyd and Jack Green, December 12, 2023).
- *Professionalism and Civility: Three Perspectives* – CLE presentation sponsored by the Clark County Bar Association (co-presenter with Teresa Foster and Jon McMullen, December 4, 2024).
- *Evidence Refresher* - CLE presentation sponsored by the Clark County Bar Association (co-presenter with Judge Tsering Cornell and Judge Derek Vanderwood, March 25, 2025).

COMMUNITY ACTIVITIES AND PRESENTATIONS:

- Cowlitz County Youth in Government Day (2013 - 2014).
- Cowlitz County Citizen's Police Academy – Presenter (March 26, 2014).
- Domestic Violence Prosecution – Presenter for Cowlitz County Domestic Violence conference, sponsored via Violence Against Women STOP grant (November 18, 2014).
- Clark County YMCA Mock Trial Tournament – Rater (2015 - 2018).
- Clark County YMCA Mock Trial Tournament – Judge (2019 - 2025).
- Washington State YMCA Mock Trial Championship – Judge (2022, 2024).
- Clark County Day of Remembrance for Homicide Victims – Guest speaker (September 25, 2019).
- Clark County Bar Association "Street Law" Program presenter – (2023 - present).
- DMCJA "You've Been Served" legislature outreach program, local coordinator (2022 - present).
- Vancouver Sunrise Rotary Club - Member (2022 - present).
- "Vets Standing Up for Vets" event for Clark County Veterans Therapeutic Court – Organizer and host (2024).

INTERESTS/HOBBIES:

- Exploring the natural beauty of the Pacific Northwest by hiking and snowshoeing, reading (particularly regarding history and social issues), film.

Paris Eriksen

From: Wynne, Roger <Roger.Wynne@seattle.gov>
Sent: Thursday, August 7, 2025 9:16 PM
To: Bar Leaders
Cc: Doug Ende
Subject: [External]Application to serve on the Oath Review & Drafting Task Force
Attachments: d-Resume Roger Wynne Aug 2025 WSBA Oath Task Force.pdf

Follow Up Flag: Follow up
Flag Status: Flagged

Dear Bar Leaders.

I was pleased to learn of the Oath Review & Drafting Task Force from Doug Ende, who encouraged me to apply to serve on it.

Please consider me for a position on the Task Force. As summarized in my attached resume, I have a record of public service through my role at the Seattle City Attorney's Office and community service in a variety of capacities. I care about our profession and the standards to which we hold ourselves. As evidenced by my having chaired the WSBA Court Rules and Procedures Committee and my work on legislation for the City of Seattle, I am an unabashed grammar geek with a penchant for working with others to craft clear language.

I would welcome the opportunity to advance the Task Force's mission and work with Doug Ende again.

Please let me know if you have any questions about my application.

Thank you,
- Roger Wynne

Roger Wynne
(he/him)
Assistant City Attorney
Land Use Section Director
Seattle City Attorney's Office
701 Fifth Avenue, Suite 2050
Seattle, WA 98104-7097
Phone: 206-233-2177
FAX: 206-684-8284
roger.wynne@seattle.gov

ROGER WYNNE
Seattle City Attorney's Office
701 5th Ave., Ste. 2050
Seattle, WA 98104–7097
roger.wynne@seattle.gov

PROFESSIONAL EXPERIENCE

Seattle City Attorney's Office, Seattle, WA
Assistant City Attorney, 2001–present.

- Land Use Section Director, 2010–present. Manage a team of nine attorneys and staff.
- Land use and municipal law practice emphasizes litigation in a full range of administrative and judicial tribunals, and counseling the City Council, Mayor's Office, and executive departments.
- Recipient of the Washington State Association of Municipal Attorneys' Outstanding Service Award, 2014.
- Recipient of the Washington State Bar Association's Angelo Petruss Award for Lawyers in Public Service for "significant contribution to the legal profession, the justice system, and the public," 2009.
- Admitted in Washington State, Western District of Washington, Ninth Circuit Court of Appeals, and U.S. Supreme Court.

Preston Gates & Ellis LLP, Seattle, WA
Associate, 1993–2001. Land use and environmental law practice emphasizing litigation and permitting for public and private clients.

EDUCATION

University of Michigan School of Natural Resources, Ann Arbor, MI
Master of Science, Natural Resource Policy and Behavior, 1994.

- Joseph L. Sax Fellow Award for outstanding law and policy student.

University of Michigan Law School, Ann Arbor, MI
Juris Doctor, *cum laude*, 1993.

- E. Blythe Stason Award for best student article in the JOURNAL OF LAW REFORM.
- Louis Honigman Memorial Award for editorial contributions to the JOURNAL.

Yale University, New Haven, CT
Bachelor of Arts, History, *magna cum laude* with distinction in the major, 1988.

- Silliman Cup for contributions to the life of the College.

COMMUNITY SERVICE

Washington State Association of Municipal Attorneys

- Board Member, 2015–2023; President 2020–2021.
- Member, *Amicus* Committee, 2003–2006, 2023–present. Evaluate requests for *amicus* support and co–author briefs.

Washington State Bar Association

- Member, Supreme Court Ethics Advisory Committee, 2010–2011, 2013–2017. Served as the WSBA's appointee to, and sole non-judicial member of, the committee that advises Washington judges on application of the Code of Judicial Conduct.
- Chair, Court Rules and Procedures Committee, 2006–2009. Directed the Committee's activities and served as spokesperson and liaison to the WSBA Board of Governors and Washington State Supreme Court on amendments to state court rules.
- Member, Court Rules and Procedures Committee, 2003–2006. Chaired subcommittees on amendments to the Rules of Appellate Procedure and the General Rules.
- Member, Environmental and Land Use Law Section Executive Committee, 2005–2008. Developed and implemented Section activities for the benefit of Section members.

Seattle University School of Law

- Adjunct Professor, 2014, 2016, and 2018. Created and taught a Washington land use law course.

Northwest Justice Project

- Board Member, 2004–2013. Served as a director of Washington's largest provider of civil legal services to low-income persons, including terms as Vice President, Secretary, and Executive Committee member.

King County Bar Association Neighborhood Legal Clinic Program

- Greenwood Neighborhood Legal Clinic Volunteer, 2002–2013.
- Committee Member, 2003–2006. Helped oversee and coordinate the clinic program.

University of Washington Law School

- Guest Lecturer, 1996–2012. Taught sessions for various environmental law courses.
- Volunteer, Professional Mentoring Program, 2002–2006. Mentored first-year students.
- Member, GreenLaw Advisory Board, 2005–2006. Advised a law student organization.

WASHINGTON STATE
BAR ASSOCIATION

CHARTER

Oath Review and Drafting Task Force

Adopted: July 18, 2025.

Background

Oaths of legal practitioners in the state of Washington are found in Admission and Practice Rule (APR) 5. There is an Oath of Attorney, as well as corresponding Oaths for Limited Practice Officers (LPO) and Limited License Legal Technicians (LLLT).[1] Taking the oath is a preadmission requirement for each license type, and the oath, in most cases, must be taken in person, by telephone, or by videoconference before an elected or appointed judge sitting in the state of Washington.[2] The Oath of Attorney has been a component of the Admission and Practice Rules (formerly known as the Rules for Admission to Practice) since 1938. The oath adopted by the Supreme Court was based on the statutorily prescribed oath first adopted by the Washington Legislature in 1917, though language used in the oath appears to date back to Territorial laws enacted in 1863. The Oath of Attorney has been amended from time to time,[3] but much of the language that remains is derived from the statute. The Oath for LPOs was added to the APR in 2017, formerly appearing in the Regulations of the APR 12 Limited Practice Board; it was initially adopted in 1987 as part of the former Rules for Admission and Certification to Limited Practice. The Oath for LLLTs was adopted in 2012.

Task Force Purpose and Responsibilities

The Oath Review and Drafting Task Force is established to evaluate whether WSBA should suggest the Supreme Court amend Washington State's APR 5 oaths in ways that would update and reinvigorate them. Should the Task Force recommend amendment of the oath, it shall prepare draft amendments for the Board of Governors' consideration. In performing these responsibilities, the Task Force shall proceed according to the following objectives and guidelines.

- The Task Force shall communicate about its process with members and the public and seek input. The Task Force shall, in particular, obtain advisory perspectives from stakeholder groups with an interest in the content of the oath, including new and young lawyers; senior lawyers; the access-to-justice community; the judiciary; law schools and law students; Inns of Court; WSBA Sections; and county, affinity, and specialty bar associations.
- The Task Force shall gather and review historical materials about the development of Washington State's oaths, as well as perform a comparative analysis of the oaths in use by other jurisdictions.
- The Task Force shall consider whether it is advisable to consolidate the three existing oaths into one oath.
- The Task Force shall, in considering the content of the oath, recognize that violation of the oath can be a basis for discipline in Washington. See RPC 8.4(k); LPORPC 1.10(e); LLLT RPC 8.4(k).

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[1] *See* APR 5(g), (h), (j).

[2] APR 5(f). Note that in June 2025, the Supreme Court adopted changes to the oath requirements in order to permit oaths to be taken by telephone or videoconference.

[3] For example, in the 1950s, the Oath included the following language: "I am not now and never have been a member of any organization or party having for its purpose and objective the overthrow of the United States government by force or violence." *See* Ralph S. Brown & John D. Fassett, *Loyalty Tests for Admission to the Bar*, 20 U. CHI. L. REV. 480, 485 (1952-1953).

- The Task Force shall provide periodic updates to the Board of Governors about its progress.
- The Task Force shall ensure that its recommendations are consistent with WSBA's organizational parameters as defined in General Rule 12.2.
- The Task Force shall submit a final report to the Board of Governors, including, as appropriate, draft amendments to the oaths and related rules.

Timeline

The work of the Task Force shall be accomplished according to the following schedule:

- Begin meeting no more than six weeks after member and chair appointments are completed;
- Complete work and submit a final report not later than one year after the first Task Force meeting, unless the timeline for completion is extended by the Board;
- If the Board of Governors approves a recommendation to submit suggested amendments to the Supreme Court, prepare a set of suggested rule amendments and GR 9 materials for submission to the Supreme Court before the first GR 9 deadline after the draft amendments are approved.

Task Force Membership

The Task Force shall consist of the following voting members:

- An active WSBA member, not currently serving on the Board of Governors, who shall serve as Chair;
- Two current or former members the Board of Governors or WSBA officers;
- Six members of the WSBA, including at least one Limited Practice Officer or Limited License Legal Technician and a judicial member.

In recruiting and appointing voting members, consideration shall be given to diversity in a range of areas, including gender, ethnicity, disability status, sexual orientation, geography, areas of practice, and practice experience.

In accordance with WSBA Bylaws Art. IX(B)(2), selection of the chair and persons to be appointed to the Task Force will be made by the President with confirmation by the Board of Governors.

The Executive Director shall designate a WSBA staff liaison.

Meetings

The presence of a majority of Task Force members at a meeting constitutes a quorum. A quorum must be present at the time any vote is taken. Decisions of the Task Force shall be made by majority vote of members present at the time of the vote.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

FROM: Executive Director Terra Nevitt

DATE: August 26, 2025

RE: Executive Director's Report

That's a Wrap on the Summer Bar Exam

A total of 780 applicants sat for the lawyer bar exam administered at the Tacoma Convention Center on July 29-30 with some accommodated applicants testing at the Hilton Garden Inn in Tacoma through August 1. We haven't seen a room this full since 2015 when 814 applicants sat for the exam. In addition to the increased number of examinees there was also an increase in the number of requests for testing accommodations (RSD staff received 81 requests for testing accommodations which is a 37% increase from last summer) and the need for additional individual and small group rooms. Thanks to expertly coordinated teamwork and dedication of 27 WSBA staff and 56 proctors, the exam administration was essentially flawless.

Volunteer Recruitment Efforts for FY26

The volunteer recruitment season is wrapping up. This year, we received applications from over 170 individuals. As with the last couple of years, we continue to receive more applications than vacancies. Few vacancies remain and we are confident these will be filled by October 1. Recruitment begins anew in Spring 2026.

Find Joy in Justice at the ATJ Conference

Get ready to join with community members, legal advocates, judges, attorneys, and policymakers from across Washington at the 2025 Access to Justice Conference, Sept. 18–19 in Yakima and online. This year's theme, "Finding Joy in Justice Work: Centering Hope and Community Care," focuses on uplifting Indigenous approaches to justice that emphasize resilience, healing, and the power of community. Register to attend now!

Attachments

Q3 FY25 Fiscal Update
Q3 FY25 Budget Reallocations
Q2 FY25 Discipline Report
Media Report
Member Demographics Report
Litigation Report (confidential)

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors
Budget and Audit Committee

From: Tiffany Lynch, Director of Finance

Subject: FY 2025 Third Quarter Financial Update

Date: July 23, 2025

GENERAL FUND

The June 30, 2025 financials mark the end of the third quarter of fiscal year 2025. With 75% of the year complete, the General Fund is outperforming against budget with revenue ahead of budget, indirect expenses on target, and direct expenses under budget. The result is a net income of $871,795 without the use of Facilities or Special Projects and Innovation Fund reserves and $1,201,104 with the use of those reserves, as of June 30, 2025. Below is a narrative which highlights the areas of interest and estimates moving forward.

REVENUE

Total revenue is ahead of budget at 80% (+$1,157,626), which includes the following areas of note:

a. *Licensing Fee*s are slightly below budget at 74.7% (-$45,927). Fee revenue is pro-rated each month to reflect 1/12 of total license fees collected for the year. Remaining fees unaccounted for will consist of license fees for newly admitted members in the last quarter of the fiscal year. Based on what has been collected, it is likely that WSBA will come in slightly under budget by the end of the year.
b. *Bar Exam Fees* are over budget by $103,515 (+8%). We expect additional fees for admission by motion applicants and estimate a year-end result of approximately $160,000 over budget.
c. *Bar News: Job Target* revenue is under budget by -$57,295 (-32%), consistent with an ongoing decline in number of jobs advertised. We expect to end the year under budget by approximately $70,000 (40%).
d. *Recovery of Discipline Costs* is under budget by -$14,289 (-20%) and will likely remain so through the end of the year. This revenue source is difficult to predict because it is based on individual action largely outside the control of WSBA.
e. *Interest income* is over budget for the year by $39,581 (+7%). The budget assumed a more significant decline in interest rates than actual results to date. We will continue to earn interest income through the rest of the fiscal year and anticipate ending the year approximately $170,000 over budget.
f. *Law Clerk Fees* are over budget by $11,326 (+5%), despite increasing the budget as part of the FY25 reforecast process. Program participants can enroll throughout the year and pay a prorated fee at the time of enrollment. Historically we have continued to earn revenue in the

last quarter of the year from rolling admission to the program and expect that trend to continue this year.

g. *MCLE Revenue* is ahead of budget by $241,185 (+20%) from higher than anticipated fees. We expect to continue to earn revenue through the rest of the fiscal year, coming in around 15% over.
h. *Pro Hac Vice* is ahead of budget by $30,172 (+7%) and will likely end the year over budget. Revenue can be difficult to predict as it is collected based on timing of applications which varies throughout the year; however, we typically continue to receive fees each month for the rest of the fiscal year.
i. *Reimbursement from Sections* is over budget for the year by $89,299 (+32%). This revenue is derived from the per-member charge that reimburses WSBA for the cost of administering Sections for the membership year (January-December). Because WSBA's membership year and fiscal year are different, three months of the reimbursement collected for October-December will be allocated to FY26 in September and we expect that this will bring revenue back in alignment with the budget.

EXPENSES

Total expenses are under budget by $874,891 (-4%), which includes the following areas of note:

a. *Direct Expenses* are under budget by $527,609 (-16.5%). Direct program costs such as board/council/taskforce meetings, event expenses, supplies, staff travel, etc. vary depending on the timing of activities. However, we do anticipate coming in under budget at the end of the year, in part due to specific expenses that are unlikely to be spent, including:
    i. *Printing, Copying & Mailing for Bar News* which is running under budget at 64% YTD. We anticipate savings of approximately $40,000 at year-end.
    ii. *BOG Elections* expense is complete as of June, resulting in savings of $25,702 for the year.
    iii. *Human Resources total expense* which is running under budget at 42% YTD. We anticipate savings of approximately $30,000 due to unspent consulting services and timing of WSBA staff trainings.
    iv. *Moderate Means Program* which is currently under assessment and is expected to come in under budget by approximately $60,000 for the year.
    v. *Various WSBA entity budgets* will likely have lower cost than budgeted. Many entities budget assuming some in-person meetings or events, however to date many of them have continued to hold virtual meetings or have limited in-person attendance.
b. *Indirect Expenses* are under budget at 73% with savings variance of $347,283.
    i. Salaries, Taxes, & Benefits have combined savings of $115,472. Temporary salaries are running ahead of budget due to the timing of seasonal staff and the inclusion of staff replacement and unanticipated staff support. This is offset by savings in salaries and payroll taxes and retirement. In Q4 we anticipate some higher expenses due to staff restructuring in the IT department and a reduction in WSBA's employer contribution for retirement benefits, which had a significant rate reduction beginning in July.
    ii. Other Indirect Expenses had combined savings of $231,812 mainly due to the lower cost YTD for workplace benefits, legal fees, Computer Pooled Expenses (IT direct expenses), Furniture and Office Equipment Depreciation, and Human Resources Pooled Expenses (HR direct expenses). It is expected that some of these areas will end the year with savings, however we do anticipate running over budget for Computer Pooled Expenses (caused by IT staffing restructuring) and will likely be on budget for Furniture and Office

Equipment Depreciation.

CONTINUING LEGAL EDUCATION (CLE)

The CLE fund includes CLE Seminars, CLE Products, and Deskbook cost centers which collectively have budgeted a loss of $119,177 for FY 2025. June 30, 2025 results reflect an actual surplus of $47,557. Revenue is running under budget by $26,353 (-2%) due to lower than anticipated seminar registrations, product sales, and deskbook sales. Expenses overall are under budget by $162,243 (-10%), mostly due to lower expenses from timing of direct expenses that have not been incurred yet for seminars held in Q4.

CLIENT PROTECTION FUND (CPF)

The Client Protection Fund (CPF) budgeted a surplus of $240,871 for FY 2025. Actual results as of June 30, 2025 reflect a surplus of $849,180. Revenue is ahead of budget for the year by $203,047 (+22%), primarily from member assessments which are recognized upon collection during annual license renewals. Overall expenses are under budget by $464,019 (-67%) primarily related to Gifts to Injured Clients. Each year, most of the payments are not awarded until September. Additionally, this year there were gifts approved for payment in prior years but not claimed and therefore remain unpaid. The CPF allows for a number of years to go by before determining that the gift will go unclaimed, and the funds are “refunded” to the CPF and the expenses for Gifts to Injured Clients in the current year are reduced.

SECTIONS FUND

The Sections Operations cost center represents the collective total of financial activity for all 29 sections. Sections budgeted a loss of ($394,722) for FY 2025. Actual results as of June 30, 2025 reflect a loss of ($8,304). Section Dues revenue and Reimbursement to WSBA for Indirect Expense costs are over budget because Sections collect most of their dues in January and February and like Reimbursement from Sections in the General Fund, one quarter of the dues and reimbursement expenses will be allocated to FY26 because of the difference between the membership year and fiscal year. Additionally, seminar profit share revenue will be allocated out in September. Direct expenses of Section Activities are running under budget by $321,734 (-42%) lower than budget and are based on the timing of programming and Section activities throughout the year.

WASHINGTON STATE
BAR ASSOCIATION

To: Board of Governors
Budget and Audit Committee

From: Terra Nevitt, Executive Director

Date: July 14, 2025

Subject: FY 2025 Budget Reallocations for Q3

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 May 5, June 9, and July 10. For the months of April and June, there were no approved allocations.

For FY 2025, the WSBA's annual operating budget is $28,250,284 (reforecast effective May 1, 2025) and the Executive Director's limit for reallocation is up to $1,412,514 (5%). The total amount of funds reallocated from October 1 through June 30th are $174,434 (0.62% of annual operating budget).

FY25 Budget Reallocations for Q3

1. *Staff Conference & Training (CLE Products)*- The FY25 budget did not include funding for conference attendance in the CLE Products cost center which was needed to send a newly hired employee to the Association for Continuing Legal Education annual conference. A total of $1,000 was needed and able to be reallocated from Printing and Copying costs in the Bar News cost center which is anticipated to come in under budget at year-end.

2. *Staff Conference & Training (Office of the Executive Director)*- The FY25 budget assumed attendance at fewer conferences for the Executive Director than she will attend by the end of the year. This year she was asked to present at a number of conferences which contributed to her decision to attend. A total of $5,400 was needed and could be reallocated from Leadership Training in the same cost center which is anticipated to come in under budget at year-end.

WASHINGTON STATE
BAR ASSOCIATION
Office of Disciplinary Counsel

MEMO

To: Terra Nevitt, WSBA Executive Director

From: Douglas J. Ende, WSBA Chief Disciplinary Counsel & Director of the Office of Disciplinary Counsel

Date: August 25, 2025

Re: Quarterly Discipline Report, 2nd Quarter (April – June) 2025

A. Introduction

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

The Quarterly Discipline Report provides a periodic, high-level overview of the functioning of the Office of Disciplinary Counsel. The report graphically depicts key discipline-system indicators for the 2nd Quarter 2025. Note that all numbers and statistics herein are considered tentative/approximate. Final figures will be issued in the 2025 Discipline System Annual Report.

B. REMINDER: Limitations on Governor/Officer Involvement in Discipline Matters

By rule, the Supreme Court has expressly restricted the involvement of Governors, Officers, and the Executive Director in investigative, prosecutorial, or adjudicative decisions in the discipline system. The BOG does not have right or responsibility to review or influence decisions or recommendations in individual discipline/disability cases. Rule for Enforcement of Lawyer Conduct (ELC) 2.2(b). Accordingly, the BOG does not adopt disciplinary policies that constrain or alter the discretion of disciplinary counsel or other constituents of the discipline system with respect to the handling of individual matters. Inquiries or complaints about the handling of particular grievances or cases (from licensed legal professionals or grievants) should immediately be referred to the Chief Disciplinary Counsel and/or WSBA General Counsel and should not be responded to directly. Current and former members of the Board of Governors, Executive Directors, and Officers cannot knowingly advise or represent individuals regarding pending or likely disciplinary grievances or proceedings. ELC 2.14.

C. Summary of Disposition of Formal Matters[1]

Public Dispositions

Disbarments (3):

Nathan McAllister #37964
Talwinder L. Singh #56762
Paul Arnold Wallstrom #8605

Suspensions (5):

Alistair Chan #55568 (60 Days) (*Stipulation*)
Thomas Michael Geiger #6885 (30 Days) (*Stipulation*)
Timothy South #26267 (1 Year)
Jeremiah Spencer Styles #49543 (3 Years) (*Stipulation*)
Philip Saint John Wakefield #22599 (8 Months) (*Stipulation*)

Reprimands (2):

John Phillip Abrams #31068 (*Stipulation*)
Louis Hunter #43818 (*Stipulation*)

Resignation in Lieu of Discipline (1):

Kenneth Richard Zigler Jr. #41723

Reciprocal Discipline (7):

Gary M. Bullock #21367 (Reprimand)
Frederic Ernest Cann #15962 (6 Month Suspension)
John Cochran #38909 (Disbarment)
Angus F Ni #53828 (5 Month Suspension)
Jeffery P. Thayer #33921 (30 Day Suspension)
Lawrence Leroy Taylor #20595 (Reprimand)
Travis Richard Walker #50110 (Admonition)

Admonitions Issued by RC (2):

Andrekita Silva #17314
Brett Andrews Purtzer #17283

Disability Found (2):

Benjamin Andrew Pepper #49692
Kurt Bradley Peterson #27580

Proceeding Dismissed (1):

Lorraine Lee #20751 (reciprocal)

[1] Names in red font denote actions occurring in the current reporting quarter.

Interim Suspensions (9):

Interim ELC 7.1: Interim Suspension for Conviction of a Crime

Matthew Philip Goldman #54657
Christopher Jason Paul Henry #55445

Interim ELC 7.2: Interim Suspension in Other Circumstances

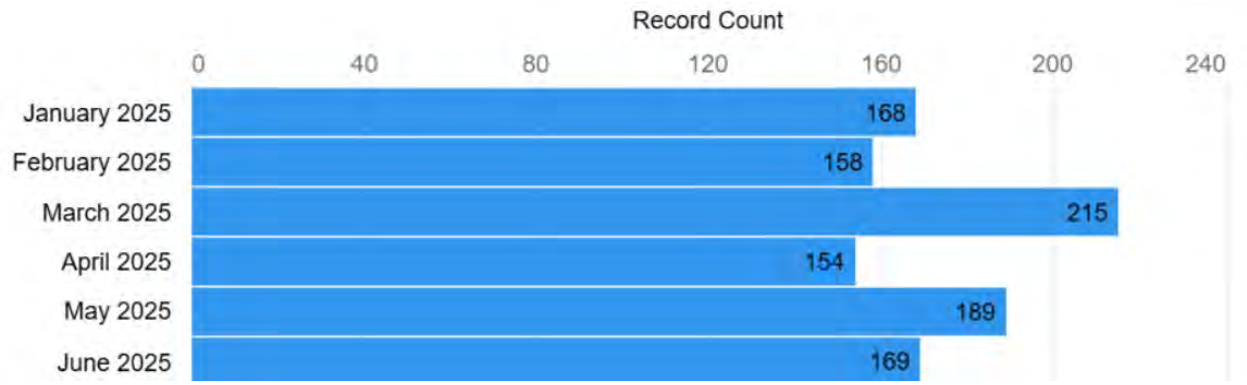
Ashley Briana Cuber #59370
Mark Ture Elliott #54007
Nichole Danelle Fisher #54253
Joseph W. Kuhlman #42884
Shannon Marie McMinimee #34471
Stephen Kenneth Monro #26075

Interim ELC 7.3: Automatic Suspension When Respondent Asserting Incapacity

Andrew Michael Reeves #47116

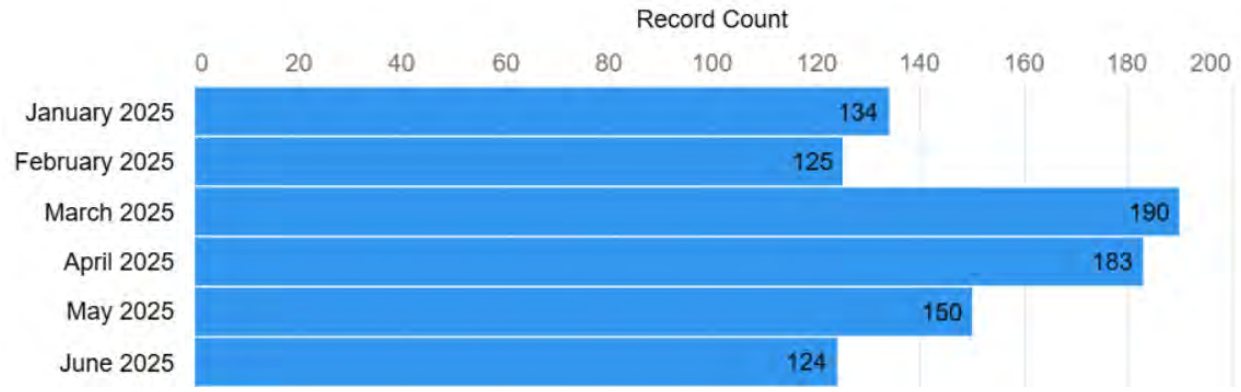
D. Grievances and Dispositions[2]

Number of Grievances Received	**2025 YTD: 1,053**
	2024: 1,818



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

Number of Grievances Resolved	**2025 YTD: 906**
	2024: 1,805



Diversion Statistics

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	2025 Total *(to date)*	2024 Total
New Diversion Files	1	0			1	9
Completed Diversion Files	2	1			3	16
Terminated Diversion Files	0	0			0	2

Disciplinary Actions and Statistics

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	2025 Total *(to date)*	2024 Total
Formal Complaints Filed	4	11			15	29
Reciprocal Discipline Files Opened	5	3			8	12
Stipulations	3	3			6	21
Hearings Held[3]	2	1			3	8
Currently Open Proceedings[4]	43	50				

Matters Acted on by Reviewing Bodies

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	2025 Total *(to date)*	2024 Total
Supreme Court	14	13			27	52
Disciplinary Board	4	8			12	24
Review Committee	91	114			205	453

[3] Includes default hearings.

[4] The Currently Open Proceedings numbers reflect the number of proceedings open at the time of the reporting period.

E. Final Disciplinary Actions

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	2025 Total *(to date)*	2024 Total
Disbarments	2	2			4	15
Resignations in Lieu	1	0			1	9
Suspensions	4	4			8	16
Reprimands	1	3			4	11
Admonitions	2	1			3	0
Total	10	10			20	51

F. Disability Found

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	2025 Total *(to date)*	2024 Total
Disability Found	2	0			2	5

G. Discipline Costs Collected[5]

Quarterly Discipline Costs Collected	Total
1st Quarter	$8,518.13
2nd Quarter	$7,105.81
3rd Quarter	TBD
4th Quarter	TBD
2025 Total	**$15,623.94**
2024 Total	**$62,429.12**

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

WASHINGTON STATE
BAR ASSOCIATION

MEMO

To: Board of Governors

From: Jennifer Olegario, Communications and Outreach Manager, and Sara Niegowski, Chief Communications Officer

Date: Aug. 26, 2025

Re: **Summary of Media Contacts, June 18-Aug. 26, 2025**

Date	Journalist and Media Outlet	Inquiry
June 24	Patrick Malone, Seattle Times	Asked about the ability of a myriad of discipline records, including grievance information the WSBA does not collect and cannot make public. Worked with the reporter to understand his needs and funnel that into an official records request.
July 2	Amy Radil, KUOW	Requested public discipline information for attorneys Ann Davison and Natalie Walton-Anderson. Responded that no public discipline information is available.
Aug 8	TJ Martinell, The Center Square	Seeking to confirm documents from the Office of Disciplinary Counsel sent to AG Nick Brown are authentic, seeking comment on an alleged grievance against the Attorney General

News Releases

- Washington State Bar Association Honors James Nagle as Local Hero (July 30)

News Coverage

- "WA AG Nick Brown Threatened with Suspension of License to Practice Law," The Center Square, Aug. 18
- "Washington works towards easing public defender shortage, but more must be done," The Seattle Times, Aug. 15
- "Networking--August 2025," Tri-Cities Area Journal of Business, Aug. 14
- "King County Adopts Caseload Limits for Public Defenders," Seattle Medium, Aug. 13

- "Council to consider establishing a Youth Council and a $235,00 increase in legal services," Lynwood Times, Aug. 10
- "New law empowers law enforcement to act on tribal warrants," The Reflector, July 21
- "Ruling will lighten load for Whatcom County public defenders," Bellingham Herald, July 1
- "Okanogan County will hire more public defenders over next decade," Methow Valley News, June 26

WASHINGTON STATE
BAR ASSOCIATION

To: Budget and Audit Committee

From: Tiffany Lynch, Director of Finance

cc: Executive Leadership Team

Re: FY 2026 Budgets – Final Draft

Date: August 18, 2025

ACTION: Approve (1) Final Draft FY26 Budget and (2) Request to increase 2026 section membership dues for the Business Law Section ($35), Health Law Section ($30), and the Labor and Employment Section ($35).

Attached for your consideration is the Final Draft FY26 WSBA Budget (Final Draft), which was unanimously approved by the Budget and Audit Committee at their August 18, 2025 meeting. Provided is an overview comparison of the First and Final Draft General Fund, CLE, Client Protection Fund, and Sections Budgets and detailed changes. Individual cost center budget details are included in attachments along with a WSBA Budget Glossary (*see attachment J*) for reference.

FY26 BUDGET COMPARISON: FIRST vs FINAL

The final draft of the FY26 WSBA budget is divided into four funds: (1) General Fund, (2) CLE Fund, (3) Client Protection Fund, and (4) Sections Funds. Each has its own designated reserves, which are either increased or reduced each year depending on the financial operating results of the designated cost centers. Presented for consideration are two versions of the final budget. The first version (v1) assumes approval of changes to WSBA's Hardship Exemption, which is slated for action at the September Board of Governors meeting. The second version (v2) assumes that the hardship exemption is not approved. The difference between the two versions is reflected in the budget for license fees in the General Fund, with v1 reflecting $140,400 less in revenue than v2. Below is the comparison between the first draft and versions 1 and 2.

ALL FUNDS BUDGET	FIRST	FINAL v1	Difference	% Change
REVENUE	$26,168,283	$26,681,199	+$512,916	+1.96%
EXPENSE	$27,661,743	$27,923,692	+$261,949	+0.95%
Direct Expense	*$4,032,802*	*$4,942,227*	*+$909,425*	*+22.6%*
Indirect Expense	*$23,628,941*	*$22,981,465*	*($647,476)*	*(2.7%)*
NET INCOME/(LOSS)	**($1,493,460)**	**($1,242,493)**	**($250,967)**	
Use of Special Projects & Innovation Reserve	$80,972	$80,972	$0	
NET INCOME/(LOSS) w/use of designated reserves	**($1,412,488)**	**($1,161,521)**	**($250,967)**	

ALL FUNDS BUDGET	FIRST	FINAL v2	Difference	% Change
REVENUE	$26,168,283	$26,821,599	+$653,316	+2.5%
EXPENSE	$27,661,743	$27,923,692	+$261,949	+0.95%
Direct Expense	*$4,032,802*	*$4,942,227*	*+$909,425*	*+22.6%*
Indirect Expense	*$23,628,941*	*$22,981,465*	*($647,476)*	*(2.7%)*
NET INCOME/(LOSS)	**($1,493,460)**	**($1,102,093)**	**($391,367)**	
Use of Special Projects & Innovation Reserve	$80,972	$80,972	$0	
NET INCOME/(LOSS) w/use of designated reserves	**($1,412,488)**	**($1,021,121)**	**($391,367)**	

(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 supports the 41 cost centers within the General Fund. The first draft FY26 General Fund budget is based on attorney license fees for the 2026 calendar year of $468, which increased by $10 for the first time since 2020.

The FY26 budget includes the use of designated reserve funds to support the initial stages of development of the License Pathways project (using the Special Projects and Innovation Reserves). At the start of FY25, the total amount of funds designated for the Special Projects and Innovation fund was $400,000, most of which is expected to be used in FY25. The estimated remaining balance is reflected in the chart below ($80,972). A proposal to allocate an additional $460,000 to the Special Projects and Innovation Fund reserve will be presented to the Budget and Audit Committee in August, which includes funds earmarked for the Moderate Means Program ($300,000) and the remaining cost for Regulatory Reform ($160,000). If approved by the Board of Governors. (*See attachment A for v1 General Fund detailed cost center budgets and attachment B for v2.)*

General Fund Budget	FIRST	FINAL v1	Difference	% Change
▪ Revenue	$23,625,938	$23,485,538	($140,400)	(0.6%)
▪ Expenses	$25,232,845	$24,402,843	($830,002)	(3.3%)
▪ Net Income/(Loss)	($1,606,907)	($917,305)	($689,602)	
▪ Use of Special Projects & Innovation Reserves	$80,972	$80,972	$0	
▪ **NET INCOME/(LOSS) w/use of designated reserves**	**($1,525,935)**	**($836,333)**	**($689,602)**	

General Fund Budget	FIRST	FINAL v2	Difference	% Change
▪ Revenue	$23,625,938	$23,625,938	$0	0%
▪ Expenses	$25,232,845	$24,402,843	($830,002)	(3.3%)
▪ Net Income/(Loss)	($1,606,907)	($776,905)	($803,002)	
▪ Use of Special Projects & Innovation Reserves	$80,972	$80,972	$0	
▪ **NET INCOME/(LOSS) w/use of designated reserves**	**($1,525,935)**	**($695,933)**	**($830,002)**	

(2) CLE FUND

The CLE Fund is a board-designated operating reserve, consisting of net income from the CLE activities, to cover net loss and extraordinary costs of CLE programs, products, and/or capital acquisitions as needed. The FY26 CLE Fund Budget consists of three cost centers: (1) CLE Products; (2) CLE Seminars; and (3) Deskbooks. Versions 1 and 2 of the final budget are the same for the CLE fund. (*See attachment C for CLE Fund detailed cost center budgets.)*

CLE Fund Budget	FIRST	FINAL v1 & v2	Difference	% Change
▪ Revenue	$1,596,865	$1,596,865	$0	0%
▪ Expenses	$1,732,711	$1,728,347	($4,364)	(0.25%)
NET INCOME/(LOSS)	**($135,846)**	**($131,482)**	**($4,364)**	

(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 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. Versions 1 and 2 of the final budget are the same for the CPF fund. (*See attachment D for Client Protection Fund detailed cost center budgets.)*

Client Protection Fund Budget	FIRST	FINAL v1 & v2	Difference	% Change
▪ Revenue	$945,480	$945,480	$0	0%
▪ Expenses	$696,187	$701,380	+$5,193	+0.75%
NET INCOME/(LOSS)	**$249,293**	**$244,100**	**($5,193)**	

(4) SECTIONS FUND

The FY26 Section budgets reflect a variety of changes from FY25 based on individual plans and goals for each Section. Included in the materials are requests to increase annual dues from the Business, Health, and Labor and Employment Law Sections, effective January 1, 2026. (*See attachment E for Section Funds detailed cost center budgets and attachments F, G, and H for Section dues change requests.)*

Sections Fund Budget	FY25 Budget	FY26 Budget FINAL	Difference	% Change
▪ Revenue	$645,483	$653,316	+$7,833	+1.2%
▪ Expenses	$1,040,206	$1,091,121	+$50,915	+4.9%
▪ Net Income/(Loss)	**($394,722)**	**($437,806)**	**+$43,084**	

CAPITAL BUDGET

The final draft of the FY26 Capital Budget includes adjustments from the first draft for reduction in planned capital labor for the completion of the Law Clerk database system and MCLE system upgrades, both of which are planned for completion in FY25. *(See attachment I for capital budget details.)*

KEY AREAS OF CHANGE

Provided below is a list of the key areas of change between the first and final drafts of the FY26 budget followed by relevant narrative information for items with an asterisk.

Revenue Changes from First Draft FY26 Budget	Budget Impact
GENERAL FUND (v1 ONLY):	**($140,400)[1]**
▪ **License fees:** BOG approval of changes to hardship exemption results in reduced fee revenue.	($140,400)
SECTIONS FUND:	**+$653,316**
▪ **Membership Dues**: first draft did not include Section budgets. Dues budget variance from FY25 to FY26 is an increase of $12,862.	+$451,143
▪ **Seminar Profit Share:** first draft did not include Section budgets. Revenue budget variance from FY25 to FY26 for seminar profit share is a decrease of $1,850.	+$157,850
▪ **Other Revenue:** first draft did not include Section budgets. Budget variance from FY25 to FY26 includes a variety of items such as publications revenue, mini-CLE revenue, annual meeting revenue, and sponsorships and is a decrease of $1,130.	+$43,073
Total Increase in Revenue from First Draft FY26 Budget to Final v1	**+$512,916**
Total Increase in Revenue from First Draft FY26 Budget to Final v2	**+$653,316**

Indirect Expense Changes from First Draft FY26 Budget	Budget Impact
SALARIES:	**($748,546)**
▪ **FTEs*:** decrease of 7.0 FTEs (see narrative for details).	($823,546)
▪ **Capital Labor:** reduced to $0 based on changes to capital budget and completion of development projects in FY25.	+$75,000
BENEFITS:	**($727,497)**
▪ **Retirement:** decrease tied change in employer contribution rate from 8.4% to 5.58% and reduced FTEs.	($462,631)
▪ **Medical:** decreased resulting from reduction in FTEs.	($192,257)
▪ **FICA, L&I Insurance, WA State Family Medical Leave, Unemployment Insurance**: decreases resulting from reduction in FTEs.	($72,609)
OTHER INDIRECTS:	**+$828,567**
▪ **Computer Pooled Expenses*:** IT direct expenses (see narrative for details).	+$827,397
▪ **Human Resources Pooled Exp:** increased to account for sales tax applied to background checks beginning FY26.	+$750
▪ **Safety & Security:** increased to account for sales tax applied to security services beginning FY26.	+$420
Total Decrease in Indirect Expense from First Draft FY26 Budget to Final v1 & v2	**($647,476)**

Direct Expense Changes from First Draft FY26 Budget	Budget Impact
GENERAL FUND:	**($182,799)**
▪ **Admissions (net):** increased cost for Facility, Parking, & Food (+$46,985) and Disability Accommodations (+$25,000) based on estimates for Summer 2026 exam and changes to NextGen exam site logistics.	+$71,985
▪ **Software Hosting (RR):** increased to begin development of software in anticipation of accepting applications in early FY27.	+$20,000
▪ **Court Reporters (CFB, DISC, OGCDB):** increased cost to account for sales tax applied to this expense beginning FY26.	+$10,350
▪ **Ambassador Training & Town Halls (COMM):** new budget line for FY27 added to	+$10,000

[1] General Fund revenue difference applies only to version 1, attachment A.

provide funds for the Ambassador Program, including facilitator costs for training.	
▪ **Pro Bono & Public Service Committee (PSP):** inadvertently left out of the first draft, added back and increased by $1,000 from FY25 to host additional pro bono promotion events.	+$3,500
▪ **MCLE Board:** increased number of planned in-person meetings.	+$2,000
▪ **Internal Diversity Outreach (DIV):** increased to support food/travel for planned in-person trainings.	+$1,800
▪ **Subscriptions (COMM):** increased to add an organization-wide subscription for Law360.	+$520
▪ **Depreciation (MCLE & LAW CLERK):** net decrease in cost for completion of software development based on capital labor estimates. MCLE had a reduction of ($4,500); Law Clerk had an increase of +$1,546.	($2,954)
▪ **Donations/Sponsorships/Grants (PSP):** decreased to $0. Requesting funds be earmarked in Special Projects and Innovation Fund until future program plan is established based on assessment report and recommendations.	($300,000)
CLE FUND:	**+$1,103**
▪ IT Expenses due to General Fund	+$1,103
SECTIONS FUND:	**+$1,091,121**
▪ Direct Expenses of Section Activities	$810,582
▪ Reimbursement to WSBA for Indirect Expenses (Section Per-Member Charge)	$280,539
Total Increase in Direct Expense from First Draft FY26 Budget to Final v1 & v2	**$909,425**

A. Indirect Expenses:

1) ***FTEs (-$823,546):*** The final draft includes a reduction of 7.0 FTEs from the General Fund under the Technology budget. In July 2025 WSBA implemented a restructure of the IT department to implement our long-term strategic plan that supports our evolving and growing technology needs. WSBA has outgrown its "in-house" service model and will now partner with outside IT professionals with specific expertise when we need it. This will allow us to more nimbly scale up and down, depending on IT project requests and complexity; to remain on the cutting edge of cybersecurity; to be more efficient and flexible staying up-to-speed with the lightning pace of technology advancements; and to better serve the day-to-day needs of WSBA employees while simultaneously making headway on departments' various technology initiatives.

2) ***Computer Pooled Expenses (+$827,397):*** As part of the IT restructure, WSBA will be engaging with outside IT professionals for software development and IT helpdesk support. We've included funds in the IT budget under **Consulting Services** and **Third Party Services** for these expenses.

PROJECTED FUND BALANCES

The next draft of the budget we will provide updated fiscal projections reflecting anticipated future license fee revenue and expenses for the general fund. In the meantime, the impact of the FY26 Budget on WSBA's reserve balances is presented in the chart below.

	BALANCE @ 9/30/2024	FY25 Reforecast	FINAL DRAFT v1	ESTIMATED BALANCE @ 9/30/2026 v1	FINAL DRAFT v2	ESTIMATED BALANCE @ 9/30/2026 v2
GENERAL FUND	$10,126,350	($1,547,875)	($917,305)	**$7,661,170**	($776,905)	**$7,801,570**
OPERATING	$2,500,000	$0	$0	**$2,500,000**	$0	**$2,500,000**
FACILITIES	$207,286	($207,286)	$0	**$0**	$0	**$0**
SPECIAL PROJECTS & INNOVATION	$400,000	($319,028)	($80,972)	**$0**	($80,972)	**$0**
UNRESTRICTED	$7,019,064	($1,021,561)	($836,333)	**$5,161,170**	($695,933)	**$5,301,570**
CLE FUND	$1,344,457	($118,846)	($131,482)	**$1,094,129**	($131,482)	**$1,094,129**
CLIENT PROTECTION	$4,759,353	+$240,786	+$244,100	**$5,244,239**	+$244,100	**$5,244,239**
SECTIONS FUND	$2,123,665	($397,722)	($437,806)	**$1,288,137**	($437,806)	**$1,288,137**

OTHER PLANNING CONSIDERATIONS

While we strive to anticipate budget needs, certain decisions by the Board of Governors or the Supreme Court could impact our budget and fiscal projections. Potential impacts not factored in the FY26 budget include the adoption of WSBA's strategic plan and implementation of recommendations from the Legal Technology and Member Well-Being Task Forces. While we do not know the extent of the fiscal impact of these items now, WSBA's fiscal policies allow us to adapt through fund reallocation, amendments, and reforecasting, which may be necessary in FY26.

ATTACHMENTS

A	**FY26 General Fund Budget v1**
B	**FY26 General Fund Budget v2**
C	**FY26 CLE Budget**
D	**FY26 CPF Budget**
E	**FY26 Sections Budgets**
F	**Request to Change Section Dues- Business Law Section**
G	**Request to Change Section Dues- Health Law Section**
H	**Request to Change Section Dues- Labor and Employment Section**
I	**FY26 Capital Budget**
J	**Budget Glossary**

ATTACHMENT A

Washington State Bar Association Financial Summary
Fiscal Year 2026 Budget

Category	FY26 Budget Revenues	FY26 Budget Indirect Expenses	FY26 Budget Direct Expenses	FY26 Budget Total Expenses	FY26 Budget Net Result
Access to Justice	-	264,024	115,700	379,724	(379,724)
Admissions/Bar Exam	1,479,440	988,195	459,830	1,448,025	31,415
Advancement FTE	-	315,609	6,600	322,209	(322,209)
Bar News	529,600	331,526	382,945	714,471	(184,871)
Board of Governors	-	238,885	414,565	653,450	(653,450)
Conference and Broadcast Services	-	83,138	-	83,138	(83,138)
Character & Fitness Board	-	159,981	23,050	183,031	(183,031)
Communications Strategies	3,000	741,101	189,015	930,116	(927,116)
Communications Strategies FTE	-	257,458	-	257,458	(257,458)
Discipline	85,000	6,614,175	185,509	6,799,684	(6,714,684)
Diversity	135,000	399,721	62,575	462,296	(327,296)
Entity Regulation	75,500	166,806	27,973	194,778	(119,278)
Facilities and Operations	-	746,702	2,565	749,267	(749,267)
Finance	600,000	1,225,253	4,920	1,230,173	(630,173)
Foundation	-	175,440	19,185	194,625	(194,625)
Human Resources	-	540,066	-	540,066	(540,066)
Law Clerk Program	224,000	182,126	67,409	249,535	(25,535)
Legislative	-	270,801	24,790	295,591	(295,591)
Legal Lunchbox	34,000	59,925	8,100	68,025	(34,025)
Licensing and Membership Records	494,260	819,499	22,680	842,179	(347,919)
Licensing Fees	17,652,266	-	-	-	17,652,266
Limited License Legal Technician	17,287	73,042	10,000	83,042	(65,755)
Limited Practice Officers	182,000	99,721	32,704	132,425	49,575
Mandatory CLE	1,338,250	701,333	153,032	854,365	483,885
Member Wellness Program	9,000	242,930	13,100	256,030	(247,030)
Member Services & Engagement	15,300	309,043	125,020	434,063	(418,763)
Mini CLE	-	134,341	-	134,341	(134,341)
New Member Education	142,000	118,278	3,700	121,978	20,022
Office of General Counsel	-	1,116,772	26,750	1,143,522	(1,143,522)
Office of the Executive Director	-	932,020	142,635	1,074,655	(1,074,655)
OGC-Disciplinary Board	-	210,543	136,245	346,788	(346,788)
Practice of Law Board	-	87,080	16,200	103,280	(103,280)
Practice Management Assistance	62,000	152,525	95,695	248,220	(186,220)
Professional Responsibility Program	-	216,787	7,990	224,777	(224,777)
Public Service Programs	132,635	241,799	12,700	254,499	(121,863)
Publication and Design Services	-	124,205	5,000	129,205	(129,205)
Regulatory Services FTE	-	438,735	12,590	451,325	(451,325)
Regulatory Reform	-	180,517	57,000	237,517	(237,517)
Sections Administration	275,000	322,943	2,400	325,343	(50,343)
Technology	-	959,791	-	959,791	(959,791)
Volunteer Engagement	-	253,536	36,301	289,837	(289,837)
Subtotal General Fund	**23,485,538**	**21,496,370**	**2,906,473**	**24,402,843**	**(917,305)**
Expenses using reserve funds				(80,972)	80,972
Total General Fund - Net Result from Operations	**23,485,538**			**24,321,871**	**(836,333)**
CLE-Seminars and Products	1,491,745	1,048,807	313,153	1,361,960	129,785
CLE - Deskbooks	105,120	242,008	124,380	366,387	(261,267)
Total CLE	**1,596,865**	**1,290,814**	**437,533**	**1,728,347**	**(131,482)**
Total CLE Fund - Net Result from Operations	**1,596,865**			**1,728,347**	**(131,482)**
Total All Sections	**653,806**		**1,060,203**	**1,060,203**	**(406,398)**
Client Protection Fund-Restricted	**945,480**	**194,280**	**507,100**	**701,380**	**244,100**
Total CPF Fund - Net Result from Operations	**945,480**			**701,380**	**244,100**
Totals	**26,681,689**	**22,981,465**	**4,911,309**	**27,892,774**	**(1,211,085)**
Totals Net of Use of Reserve Funds	**26,681,689**	**22,981,465**	**4,911,309**	**27,811,802**	**(1,130,113)**

Washington State Bar Association
Budget Comparison

Cost Center			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
All	FY26 FTE	141.50						
	FY25 REFORECAST FTE	147.50						
Revenue	40200	COPY FEES	-	-	-		427	-
	40205	DIVERSION	10,000	9,000	(1,000)	-10%	11,050	1,500
	40210	RECORDS REQUEST FEES	-	-	-		315	270
	40300	DONATIONS & GRANTS	270,280	267,635	(2,645)	-1%	265,000	269,846
	40500	INTEREST - INVESTMENTS	802,050	800,000	(2,050)	0%	1,305,951	695,632
	40600	LICENSE FEES	16,853,241	16,922,074	68,833	0%	16,279,888	10,893,115
	40605	ENTITY LICENSE FEES	-	-	-		-	-
	40610	ENTITY LATE LICENSE FEES	-	-	-		-	-
	40625	LICENSE FEES - NEW ADMITTEES	429,375	465,192	35,817	8%	423,252	309,735
	40650	LICENSE FEES - LATE FEES	200,000	250,000	50,000	25%	383,255	453,642
	40675	LICENSE FEES - REINSTATEMENTS	10,000	15,000	5,000	50%	27,605	9,955
	40705	EXAM SOFTWARE REVENUE	27,500	9,500	(18,000)	-65%	30,615	8,150
	40800	PUBLICATIONS REVENUE	1,250	1,250	-	0%	1,949	2,279
	40900	ROYALTIES	74,800	74,800	-	0%	83,891	61,720
	40950	NME PRODUCT SALES	150,000	120,000	(30,000)	-20%	114,482	110,368
	41000	SHIPPING & HANDLING	210	210	-	0%	99	90
	41100	STATUS CERTIFICATE FEES	27,000	29,000	2,000	7%	29,600	21,775
	41450	SPONSORSHIPS	13,500	11,500	(2,000)	-15%	11,566	11,000
	41500	ANNUAL OR OTHER MEETING REV	5,575	4,700	(875)	-16%	4,710	-
	41650	RECEPTIONS REVENUE	-	-	-		2,500	-
	41700	CONFERENCES & INSTITUTES	3,738	2,793	(945)	-25%	3,739	-
	41800	SEMINAR REGISTRATIONS	748,000	742,535	(5,465)	-1%	671,186	403,821
	41805	MINI-CLE REVENUE	32,890	35,530	2,640	8%	32,152	24,265
	41825	SEMINAR REVENUE-OTHER	20,000	32,500	12,500	63%	51,802	14,600
	41850	SEMINAR SPLITS W/ CLE	(10,300)	(13,650)	(3,350)	33%	0	-
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		-	-
	41875	SEMINAR SPLITS W/ OTHERS	20,000	21,500	1,500	8%	32,231	-
	42207	BAR EXAM FEES	1,280,780	1,300,000	19,220	2%	1,176,215	1,345,085
	42230	BAR EXAM LATE FEES	98,200	95,000	(3,200)	-3%	56,700	67,200
	42232	HOUSE COUNSEL APPLICATION FEES	56,260	55,000	(1,260)	-2%	33,080	28,360
	42233	APPLICATION FEES	-	28,000	28,000		-	-
	42234	ANNUAL FEES	-	47,500	47,500		-	-
	42270	RULE 9/LEGAL INTERN FEES	12,500	13,000	500	4%	16,950	11,950
	42275	LAW CLERK FEES	234,000	220,000	(14,000)	-6%	201,068	238,826
	42281	LLLT LICENSE FEES	17,731	17,000	(731)	-4%	15,296	10,702
	42285	FOREIGN LAW CONSULTANT FEES	1,940	1,940	-	0%	3,100	970
	42286	LAW CLERK APPLICATION FEES	3,200	4,000	800	25%	5,000	3,600
	42287	SPECIAL ADMISSIONS	3,000	5,000	2,000	67%	6,435	6,590
	42288	INVESTIGATION FEES	25,300	26,000	700	3%	29,300	18,800
	42290	PRO HAC VICE	425,000	435,000	10,000	2%	496,975	302,873
	42291	LLLT LATE LICENSE FEES	-	137	137		404	365
	42450	AUDIT REVENUE	1,000	1,000	-	0%	170	468
	42570	50 YEAR MEMBER TRIBUTE LUNCH	100	1,000	900	900%	1,900	380
	42710	BNEWS DISPLAY ADVERTISING	405,000	405,000	-	0%	418,264	305,679
	42720	BNEWS SUBSCRIPT/SINGLE ISSUES	100	100	-	0%	108	108
	42730	BNEWS CLASSIFIED ADVERTISING	2,500	2,500	-	0%	2,761	2,872
	42760	JOB TARGET ADVERTISING	180,000	120,000	(60,000)	-33%	152,139	63,116
	43100	DESKBOOK SALES	30,000	5,120	(24,880)	-83%	18,240	7,495
	43200	COURSEBOOK SALES	3,500	3,500	-	0%	1,060	650
	43400	DIGITAL VIDEO SALES	870,000	900,000	30,000	3%	1,057,552	696,609
	43450	SECTION PUBLICATION SALES	1,000	-	(1,000)	-100%	630	90
	43455	LEXIS/NEXIS ROYALTIES	75,000	75,000	-	0%	69,907	32,457
	43525	CASEMAKER ROYALTIES	25,000	25,000	-	0%	37,575	17,350
	44100	WSBA LOGO MERCHANDISE SALES	500	2,000	1,500	300%	2,414	1,462
	44350	RECOVERY OF DISCIPLINE COSTS	70,000	65,000	(5,000)	-7%	54,568	35,681
	44450	DISCIPLINE HISTORY SUMMARY	19,000	19,000	-	0%	18,510	14,340
	44820	CPF RESTITUTION	10,000	10,000	-	0%	27,839	18,812
	44840	CPF MEMBER ASSESSMENTS	720,540	735,480	14,940	2%	548,235	711,840
	45040	MEMBER CONTACT INFORMATION	5,000	5,000	-	0%	5,706	3,498
	45060	PHOTO BAR CARD SALES	200	260	60	30%	276	432
	45110	LPO EXAMINATION FEES	20,000	16,000	(4,000)	-20%	18,600	13,100
	45115	LPO EXAM LATE FEES	3,000	2,000	(1,000)	-33%	2,300	1,600
	45120	LPO LICENSE FEES	160,000	158,000	(2,000)	-1%	156,974	104,206
	45125	LPO LATE LICENSE FEES	2,000	2,000	-	0%	3,600	3,750
	45210	ACTIVITY APPLICATION FEE	600,000	670,000	70,000	12%	724,600	487,300
	45215	ACTIVITY APPLICATION LATE FEE	220,000	250,000	30,000	14%	266,650	192,750
	45220	MCLE LATE FEES	229,300	235,150	5,850	3%	270,525	254,150
	45230	ANNUAL ACCREDITED SPONSOR FEES	39,000	36,250	(2,750)	-7%	37,500	39,750
	45250	ATTENDANCE LATE FEES	120,000	120,000	-	0%	120,050	69,400
	45255	COMITY CERTIFICATES - REQUEST	13,800	13,000	(800)	-6%	13,497	12,675
	45260	COMITY CERTIFICATES - SUBMIT	16,000	17,000	1,000	6%	16,575	18,300
	47100	TRIAL ADVOCACY PROGRAM	15,000	12,000	(3,000)	-20%	12,098	-
	48010	REIMBURSEMENTS FROM SECTIONS	275,000	275,000	-	0%	275,415	363,118
	48200	SECTION DUES REVENUE	438,280	342,113	(96,168)	-22%	425,235	427,341
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	-	109,570	109,570		-	141,745
	Total Revenue		**26,416,840**	**26,681,689**	**264,848**	**1%**	**26,569,261**	**19,369,609**

	50006	ACCOMMODATION FUND	-	-	-		(0)	-
Direct	**50015**	DEPRECIATION	12,000	37,278	25,278	211%	-	-
	50020	BANK FEES	2,500	500	(2,000)	-80%	(3,210)	(2,835)
	50033	CONSULTING SERVICES	238,700	1,052,147	813,447	341%	337,934	120,812
	50034	IT EXPENSE DUE TO GF	-	1,103	1,103		-	-
	50037	MODERATE MEANS	300,000	-	(300,000)	-100%	278,889	238,011
	50050	EQUIPMENT, HARDWARE & SOFTWARE	2,400	2,635	235	10%	6,012	1,757
	50060	POSTAGE	142,000	142,900	900	1%	139,745	97,550
	50070	PRINTING & COPYING	265,500	245,000	(20,500)	-8%	211,944	142,002
	50080	PUBLICATIONS PRODUCTION	350	350	-	0%	129	-
	50085	YLL SECTION PROGRAM	1,300	1,300	-	0%	-	585
	50095	CLE COMPS	1,000	-	(1,000)	-100%	-	-
	50100	STAFF TRAVEL/PARKING	108,471	103,271	(5,200)	-5%	67,586	31,185
	50110	STAFF CONFERENCE & TRAINING	137,432	169,850	32,418	24%	86,719	59,606
	50120	STAFF MEMBERSHIP DUES	22,260	23,403	1,143	5%	16,362	14,333
	50130	SUBSCRIPTIONS	11,346	13,242	1,896	17%	9,205	6,659
	50135	TRANSCRIPTION SERVICES	-	-	-		-	-
	50140	SUPPLIES	7,200	6,365	(835)	-12%	3,007	3,402
	50145	SURVEYS	-	-	-		17,500	-
	50155	DIGITAL/ONLINE DEVELOPMENT	2,000	2,000	-	0%	572	903
	50160	TELEPHONE	94,575	93,575	(1,000)	-1%	89,645	58,632
	50165	CONFERENCE CALLS	2,207	1,830	(377)	-17%	940	283
	50185	MEETING EXPENSE	-	2,000	2,000		-	2,098
	52110	PRO BONO & PUBLIC SERVICE COMMITTEE	2,500	3,500	1,000	40%	782	323
	52121	ATJ BOARD RETREAT	6,000	6,000	-	0%	2,718	5,117
	52125	LEADERSHIP TRAINING	41,000	45,000	4,000	10%	21,847	12,352
	52140	ATJ BOARD EXPENSE	58,500	58,500	-	0%	41,683	42,520
	52210	FACILITY, PARKING, FOOD	109,500	160,485	50,985	47%	132,934	47,695
	52215	EXAMINER FEES	44,500	43,750	(750)	-2%	31,500	21,750
	52221	UBE EXAMINATIONS	118,000	46,200	(71,800)	-61%	134,108	41,448
	52225	BOARD OF BAR EXAMINERS	42,500	45,000	2,500	6%	22,040	7,511
	52230	BAR EXAM PROCTORS	23,000	10,000	(13,000)	-57%	13,737	9,432
	52235	CHARACTER & FITNESS BOARD EXP	18,000	12,000	(6,000)	-33%	2,064	5,219
	52240	DISABILITY ACCOMMODATIONS	80,000	86,500	6,500	8%	77,913	29,601
	52245	CHARACTER & FITNESS INVESTI	1,100	1,600	500	45%	(59)	700
	52246	INVESTIGATION	-	9,900	9,900		-	-
	52250	LAW SCHOOL VISITS	2,000	1,500	(500)	-25%	1,379	21
	52255	LAW CLERK BOARD	8,000	9,000	1,000	13%	5,716	2,727
	52258	LAW CLERK OUTREACH	30,000	20,000	(10,000)	-33%	5,476	-
	52270	DEPRECIATION-SOFTWARE	-	-	-		10,697	-
	52511	BAR LEADERS SUMMIT	35,000	35,000	-	0%	-	33,963
	52520	ABA DELEGATES	16,000	18,000	2,000	13%	18,649	5,360
	52521	VOLUNTEER RECOGNITION	2,000	2,000	-	0%	-	-
	52540	SECTION/COMMITTEE CHAIR MTGS	700	500	(200)	-29%	80	89
	52570	APEX	52,500	52,500	-	0%	47,315	55
	52573	50 YEAR MEMBER TRIBUTE LUNCH	35,000	38,000	3,000	9%	25,600	7,583
	52585	WASHINGTON LEADERSHIP INSTITUTE	100,000	100,000	-	0%	80,000	100,000
	52590	BAR LEADERS CONFERENCE	-	-	-		-	-
	52660	JUD RECOMMEND COMMITTEE	2,250	3,250	1,000	44%	-	1,334
	52680	DEI COUNCIL	5,900	7,600	1,700	29%	3,948	792
	52681	DIVERSITY EVENTS & PROJECTS	43,100	37,100	(6,000)	-14%	11,016	8,058
	52683	LLLT BOARD	11,500	9,000	(2,500)	-22%	1,341	2,563
	52687	INTERNAL DIVERSITY OUTREACH	7,500	6,000	(1,500)	-20%	-	-
	52688	EXAM WRITING	19,000	15,000	(4,000)	-21%	8,400	8,400
	52689	LLLT EDUCATION	1,000	1,000	-	0%	-	35
	52691	OUTREACH EXPENSES	10,000	10,000	-	0%	-	-
	52692	OUTREACH & COMMUNICATION	-	10,000	10,000		-	-
	52710	GRAPHICS/ARTWORK	1,000	1,000	-	0%	1,103	75
	52750	EDITORIAL ADVIS COMMITTEE EXP	300	300	-	0%	20	-
	52810	BOG MEETINGS	148,000	200,000	52,000	35%	164,195	89,738
	52812	NEW GOVERNOR ORIENTATION	10,000	7,000	(3,000)	-30%	2,570	177
	52820	BOG COMMITTEES' EXPENSES	2,000	5,000	3,000	150%	18	4,173
	52821	BOG RETREAT	40,000	40,000	-	0%	30,180	38,128
	52822	BOG CONFERENCE ATTENDANCE	39,500	56,500	17,000	43%	55,335	31,162
	52823	PRESIDENT'S PHOTO	3,300	3,300	-	0%	1,652	-
	52830	BOG TRAVEL & OUTREACH	50,000	45,000	(5,000)	-10%	28,413	15,111
	52840	ED TRAVEL & OUTREACH	6,000	6,000	-	0%	5,601	2,129
	52874	PUBLIC DEFENSE	4,000	4,000	-	0%	2,213	2,279
	52878	COMMUNICATIONS OUTREACH	15,000	15,000	-	0%	3,956	2,476
	52880	BOG ELECTIONS	42,000	30,000	(12,000)	-29%	12,545	14,043
	52891	LONG RANGE STRATEGIC PLANNING COUNC	-	-	-		-	-
	52940	BOARD OF TRUSTEES	3,600	3,600	-	0%	1,245	492
	52960	PRESIDENT'S DINNER	10,000	12,000	2,000	20%	11,129	0
	53210	COST OF SALES - DESKBOOKS	5,000	2,800	(2,200)	-44%	5,154	1,162
	53220	COST OF SALES - COURSEBOOKS	300	300	-	0%	69	48
	53225	COST OF SALES - SECTION PUBLIC	500	-	(500)	-100%	429	74
	53250	A/V DEVELOP COSTS (RECORDING)	-	-	-		-	-
	53260	OBSOLETE INVENTORY	48,250	118,700	70,450	146%	6,927	-
	53255	CLE-EQUIP-DEPRECIATION	2,012	-	(2,012)	-100%	2,040	1,360
	53265	SPLITS TO SECTIONS	300	-	(300)	-100%	185	-
	53270	DESKBOOK ROYALTIES	300	-	(300)	-100%	305	-
	53280	ONLINE EXPENSES	-	-	-		-	-
	53282	SOFTWARE HOSTING	68,074	91,457	23,383	34%	64,420	44,665
	53283	ON24 OVERAGE CHARGE	4,500	4,500	-	0%	6,067	4,414
	53285	ONLINE PRODUCT HOSTING EXPENSES	54,000	54,000	-	0%	49,000	26,137
	53320	POSTAGE & DELIVERY-DESKBOOKS	300	300	-	0%	-	-
	53330	POSTAGE & DELIVRY-COURSEBOOKS	200	200	-	0%	43	53
	53610	COURSEBOOK PRODUCTION	500	150	(350)	-70%	18	-
	53620	POSTAGE - FLIERS/CATALOGS	-	-	-		-	-
	53640	ACCREDITATION FEES	3,000	2,500	(500)	-17%	1,822	1,980

53660	SEMINAR BROCHURES	-	-	-		-	-
53690	FACILITIES	165,000	175,000	10,000	6%	173,104	93,757
53700	SPEAKERS & PROGRAM DEVELOP	48,100	45,800	(2,300)	-5%	36,399	6,049
53730	HONORARIUM	4,500	4,500	-	0%	-	-
53731	INSURANCE REBATE	(3,375)	-	3,375	-100%	(2,528)	-
53740	CLE SEMINAR COMMITTEE	200	200	-	0%	-	-
54026	IMAGE LIBRARY	4,800	4,800	-	0%	4,752	4,756
54027	BAR OUTREACH	20,000	15,000	(5,000)	-25%	6,082	2,408
54065	AMBASSADOR TRAINING & TOWN HALLS	-	10,000	10,000		-	-
54130	PRO BONO OUTREACH	4,000	4,000	-	0%	1,978	1,087
54310	COURT REPORTERS	100,000	110,350	10,350	10%	106,891	47,701
54320	OUTSIDE COUNSEL EXPENSES	1,000	500	(500)	-50%	250	-
54360	LITIGATION EXPENSES	41,000	31,000	(10,000)	-24%	43,229	7,950
54370	DISABILITY EXPENSES	15,000	15,000	-	0%	7,026	4,499
54391	LAW LIBRARY DESKBOOK ACCESS	10,000	10,000	-	0%	-	9,311
54400	TRANSLATION SERVICES	12,000	10,000	(2,000)	-17%	9,448	2,905
54430	PRACTICE MONITOR EXPENSES	-	-	-		-	-
54512	STAFF TRAINING- GENERAL	36,800	29,300	(7,500)	-20%	10,295	926
54520	RECRUITING AND ADVERTISING	8,000	8,750	750	9%	6,110	2,290
54530	HR INFORMATION SYSTEM	50,000	65,950	15,950	32%	47,470	35,260
54540	SALARY SURVEYS	1,000	3,000	2,000	200%	1,973	-
54590	TRANSFER TO INDIRECT EXPENSE	(111,300)	(115,700)	(4,400)	4%	(68,911)	(40,266)
54610	LIBRARY MATERIALS/RESOURCES	4,000	4,000	-	0%	250	209
54645	LEGAL TECH TASK FORCE	5,000	3,500	(1,500)	-30%	-	2,750
54715	MEMBER WELL-BEING TASK FORCE	4,250	4,500	250	6%	1,000	1,042
54810	GIFTS TO INJURED CLIENTS	500,000	500,000	-	0%	418,710	(80,480)
54820	CPF BOARD	2,000	2,000	-	0%	887	353
54910	RENT - OLYMPIA OFFICE	-	-	-		-	-
54920	CONTRACT LOBBYIST	15,000	12,500	(2,500)	-17%	12,500	15,000
54940	LEGISLATIVE COMMITTEE	1,250	1,250	-	0%	2	130
54970	BOG LEGISLATIVE COMMITTEE	300	300	-	0%	-	-
55010	LICENSING FORMS	-	-	-		-	-
55110	LPO EXAM FACILITIES	-	-	-		-	-
55130	LPO BOARD EXPENSES	4,000	4,000	-	0%	278	356
55165	LPO OUTREACH	1,000	500	(500)	-50%	-	-
55210	MCLE BOARD EXPENSES	4,000	6,000	2,000	50%	-	1,806
55220	DEPRECIATION-SOFTWARE	142,183	142,057	(126)	0%	124,381	96,096
55250	VLEX FASTCASE	85,000	87,000	2,000	2%	84,042	84,568
55265	SPEAKERS & PROGRAM DEVELOPMENT	575	500	(75)	-13%	-	-
55266	NEW LAWYER OUTREACH EVENTS	5,000	5,000	-	0%	2,029	3,519
55270	NEW LAWYERS COMMITTEE	15,000	15,000	-	0%	2,584	778
55285	OPEN SECTIONS NIGHT	-	-	-		-	-
55310	DISCIPLINARY BOARD EXPENSES	5,000	3,000	(2,000)	-40%	797	868
55320	CHIEF HEARING OFFICER	40,000	41,200	1,200	3%	39,996	26,664
55330	HEARING OFFICER EXPENSES	4,000	4,000	-	0%	874	79
55340	HEARING OFFICER TRAINING	1,000	1,000	-	0%	-	-
55370	APPOINTED COUNSEL	50,400	50,645	245	0%	49,600	33,600
55380	DISCIPLINARY SELECTION PANEL	1,000	1,000	-	0%	-	-
55419	COURT RULES COMMITTEE	1,000	1,000	-	0%	-	-
55510	PRACTICE OF LAW BOARD	16,000	16,000	-	0%	1,157	523
55555	NEW EXPENSE ACCOUNT NEEDED	-	-	-		-	-
55610	CPE COMMITTEE	1,000	1,000	-	0%	386	286
55615	WILLS	2,000	1,000	(1,000)	-50%	-	-
55620	CUSTODIANSHIP	5,000	5,000	-	0%	125	201
55970	MEMBER ENGAGEMENT COUNCIL	500	500	-	0%	-	-
55980	SMALL TOWN AND RURAL COUNCIL	7,500	7,500	-	0%	55	-
	SMALL TOWN & RURAL COUNCIL						
55981	OUTREACH & ACTIVITIES	65,000	70,000	5,000	8%	29,282	45,000
55911	CLOUD INFRASTRUCTURE	130,000	130,000	-	0%	43,143	39,237
56100	COMPUTER HARDWARE	66,200	65,000	(1,200)	-2%	64,018	60,179
56150	COMPUTER SOFTWARE	530,000	518,000	(12,000)	-2%	268,912	295,950
56225	HARDWARE SERVICE & WARRANTIES	50,000	50,000	-	0%	30,498	34,392
56230	SOFTWARE MAINT & LICENSING	400,000	470,000	70,000	18%	338,290	340,918
56500	COMPUTER SUPPLIES	-	-	-		-	-
56550	THIRD PARTY SERVICES	65,000	177,600	112,600	173%	38,658	48,763
56900	TRANSFER TO INDIRECT EXPENSES	(1,478,500)	(2,527,807)	(1,049,307)	71%	(1,141,736)	(979,297)
57320	TRIAL ADVOCACY EXPENSES	2,025	3,200	1,175	58%	1,254	-
57450	REGULATORY SCHOOL	12,000	10,000	(2,000)	-17%	-	7,767
57460	LAW SCHOOL OUTREACH	500	500	-	0%	-	-
58125	ANNUAL OR OTHER MEETING EXPENS	22,700	23,200	500	2%	15,141	7,792
58150	ATTENDANCE AT BOG MEETINGS	2,200	2,604	404	18%	0	754
58175	AWARDS	5,810	6,810	1,000	17%	667	166
58200	BREAKFAST/LUNCH/DINNER MTG EXP	4,000	1,500	(2,500)	-63%	82	-
58225	CONFERENCE/INSTITUTE EXPENSE	30,000	-	(30,000)	-100%	(135)	22,916
58300	EXECUTIVE COMMITTEE EXPENSES	70,270	60,645	(9,625)	-14%	21,744	22,920
58305	EXECUTIVE COMM EXP - OTHER	58,500	74,000	15,500	26%	50,027	28,329

	58315	HONORARIUM	9,100	7,000	(2,100)	-23%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	89,910	110,360	20,450	23%	53,779	50,840
	58326	LEGISLATIVE/LOBBYING	2,000	2,500	500	25%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	38,570	44,220	5,650	15%	11,394	2,587
	58375	NEWSLETTER/PUBLICATION EXPENSE	14,950	20,000	5,050	34%	7,388	4,044
	58400	PER MEMBER CHARGE	280,433	210,881	(69,552)	-25%	275,378	271,326
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	-	70,108	70,108		-	91,793
	58450	RECEPTION/FORUM EXPENSE	62,510	65,010	2,500	4%	21,592	19,200
	58500	NEW LAWYER OUTREACH	5,220	5,220	-	0%	120	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	220,200	200,100	(20,100)	-9%	80,096	81,557
	58550	SECTION COMMITTEE EXPENSE	2,000	1,000	(1,000)	-50%	-	771
	58600	SECTION SPECIAL PROJECTS	8,020	9,550	1,530	19%	-	-
	58615	LAW SCHOOL OUTREACH	27,510	27,510	-	0%	7,629	4,088
	58620	MINI-CLE EXPENSE	50,516	45,075	(5,441)	-11%	18,894	3,600
	58625	SEMINAR EXPENSE - SECTIONS	76,000	84,500	8,500	11%	28,989	6,714
	58675	WEBSITE EXPENSES	10,380	11,880	1,500	14%	4,822	3,126
	58680	ELECTIONS	-	-	-		-	-
	58750	SEMINAR SCHOLARSHIPS	8,000	6,500	(1,500)	-19%	3,676	1,340
		Total Direct Expenses	**5,109,934**	**4,911,309**	**(198,625)**	**-4%**	**3,817,336**	**2,333,261**
					-			
Indirect	**51110**	SALARIES	14,691,362	14,130,725	(560,637)	-4%	13,290,031	9,364,388
	51120	BUDGETED TEMPORARY EMPLOYEES	261,668	212,850	(48,818)	-19%	302,485	206,870
	51121	UNANTICIPATED TEMPS	-	-	-		813	11,970
	51122	STAFF REPLACEMENT TEMPS					208,046	116,078
	51126	EMPLOYEE PLACEMENT FEES					900	24,773
	51130	VACATION & COMP TIME ACCRUALS					19,858	118,060
	51199	SALARY EXPENSE			-		-	-
	51210	EMPLOYEE ASSISTANCE PLAN	4,800	4,800	(0)	0%	4,800	3,600
	51220	EMPLOYEE SERVICE AWARDS	2,610	2,260	(350)	-13%	1,480	1,730
	51230	FICA (EMPLOYER PORTION)	1,112,598	1,067,890	(44,709)	-4%	1,003,129	710,984
	51240	L&I INSURANCE	72,487	65,406	(7,080)	-10%	59,309	29,544
	51245	WA STATE FAMILY MEDICAL LEAVE (ER POR	33,236	38,961	5,726	17%	28,506	23,011
	51250	MEDICAL (EMPLOYER PORTION)	2,057,482	1,959,293	(98,189)	-5%	1,880,001	1,372,320
	51270	RETIREMENT (EMPLOYER PORTION)	1,322,122	778,534	(543,588)	-41%	1,242,168	845,212
	51280	TRANSPORTATION ALLOWANCE	34,000	25,944	(8,056)	-24%	28,799	24,222
	51290	UNEMPLOYMENT INSURANCE	71,847	73,419	1,572	2%	67,559	48,243
	51299	BENEFITS EXPENSE			-		-	-
	51310	WORKPLACE BENEFITS	56,400	60,150	3,750	7%	58,052	11,774
	51340	HUMAN RESOURCES POOLED EXP	111,300	115,700	4,400	4%	68,911	40,266
	51405	MEETING SUPPORT EXPENSES	9,950	9,950	-	0%	7,592	6,302
	51409	RENT EXPENSE	-	-			1,302,980	598,595
	51410	RENT	960,000	923,055	(36,945)	-4%	415,523	83,520
	51411	MOVE/DOWNSIZING EXPENSES	28,208	-	(28,208)	-100%	36,887	24,906
	51413	RENT - CONFERENCE CENTER	-	-			(33,800)	(19,100)
	51420	PERSONAL PROP TAXES-WSBA	8,400	6,500	(1,900)	-23%	6,195	4,716
	51430	FURNITURE, MAINT, LH IMP	75,617	48,450	(27,167)	-36%	32,987	40,629
	51435	SAFETY & SECURITY	-	10,420	10,420		-	-
	51440	OFFICE SUPPLIES & EQUIP	22,164	19,635	(2,529)	-11%	16,455	11,093
	51450	FURN, LH IMP, & OFFICE EQUIP DEPREC	159,628	224,084	64,456	40%	115,775	76,202
	51470	COMPUTER HARDWARE DEPREC	42,000	47,971	5,971	14%	39,315	25,700
	51480	COMPUTER SOFTWARE DEPREC	49,339	36,319	(13,020)	-26%	69,220	32,523
	51500	INSURANCE	288,200	273,491	(14,709)	-5%	265,583	173,680
	51501	WORK HOME FURNITURE & EQUIP	14,000	10,500	(3,500)	-25%	3,996	1,541
	51505	PROFESSIONAL FEES-AUDIT	41,000	43,500	2,500	6%	38,400	36,577
	51510	PROFESSIONAL FEES- LEGAL	200,000	250,000	50,000	25%	101,591	106,115
	51512	ONLINE LEGAL RESEARCH	86,000	89,000	3,000	3%	26,439	58,316
	51513	ACCOMODATIONS FUND	6,500	6,500	0	0%	-	-
	51514	TRANSLATION SERVICES	12,000	25,000	13,000	108%	6,814	4,163
	51515	TELEPHONE & INTERNET	33,600	33,600	0	0%	32,390	21,880
	51520	POSTAGE - GENERAL	15,500	12,000	(3,500)	-23%	8,796	4,629
	51525	RECORDS MANAGEMENT	28,849	7,500	(21,349)	-74%	62,062	23,060
	51530	BANK FEES (INDIRECT)	30,000	27,000	(3,000)	-10%	23,638	8,181
	51620	PRODUCTION MAINT & SUPPLIES	13,000	13,250	250	2%	8,976	8,012
	51710	COMPUTER POOLED EXPENSES	1,478,500	2,527,807	1,049,307	71%	1,141,736	979,297
	51810	GAIN (LOSS) ON ASSETS	-	-			10,667	1,396
	51925	ALLOWANCE FOR OPEN POSITIONS	(200,000)	(200,000)	-	0%	-	-
	51955	CAPITAL LABOR & OVERHEAD	(75,000)	-	75,000	-100%	(75,555)	(93,204)
	51900	OTHER INDIRECT EXPENSE			-		-	-
	51935	INSURANCE REBATE	(19,016)	-	19,016	-100%	(20,950)	-
		TOTAL INDIRECT EXPENSES:	**23,140,350**	**22,981,465**	**(158,886)**	**-1%**	**21,908,556**	**15,171,774**
		TOTAL ALL EXPENSES:	**28,250,284**	**27,892,774**	**(357,510)**	**-1%**	**25,725,892**	**17,505,034**
		NET INCOME (LOSS):	**(1,833,444)**	**(1,211,085)**	**622,359**	**-34%**	**843,370**	**1,864,574**

Washington State Bar Association
Budget Comparison

INDIRECT EXPENSES

Cost Center **FY26 FTE** **141.50**
All **FY25 REFORECAST FTE** **147.50**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
INDIRECT	**51110**	SALARIES	14,691,362	14,130,725	(560,637)	-4%	13,290,031	9,364,388
	51120	BUDGETED TEMPORARY EMPLOYEES	261,668	212,850	(48,818)	-19%	302,485	206,870
	51121	UNANTICIPATED TEMPS	-	-	-		813	11,970
	51122	STAFF REPLACEMENT TEMPS	-	-			208,046	116,078
	51126	EMPLOYEE PLACEMENT FEES	-	-			900	24,773
	51130	VACATION & COMP TIME ACCRUALS	-	-			19,858	118,060
	51925	ALLOWANCE FOR OPEN POSITIONS	(200,000)	(200,000)	-	0%	-	-
	51935	INSURANCE REBATE	(19,016)	-	19,016	-100%	(20,950)	-
	51955	CAPITAL LABOR & OVERHEAD	(75,000)	-	75,000	-100%	(75,555)	(93,204)
	51199	**SALARY EXPENSE**	**14,659,014**	**14,143,575**	**(515,439)**	**-4%**	**13,725,627**	**9,748,935**
	51210	EMPLOYEE ASSISTANCE PLAN	4,800	4,800	(0)	0%	4,800	3,600
	51220	EMPLOYEE SERVICE AWARDS	2,610	2,260	(350)	-13%	1,480	1,730
	51230	FICA (EMPLOYER PORTION)	1,112,598	1,067,890	(44,709)	-4%	1,003,129	710,984
	51240	L&I INSURANCE	72,487	65,406	(7,080)	-10%	59,309	29,544
	51245	WA STATE FAMILY MEDICAL LEAVE (ER PORTION)	33,236	38,961	5,726	17%	28,506	23,011
	51250	MEDICAL (EMPLOYER PORTION)	2,057,482	1,959,293	(98,189)	-5%	1,880,001	1,372,320
	51270	RETIREMENT (EMPLOYER PORTION)	1,322,122	778,534	(543,588)	-41%	1,242,168	845,212
	51280	TRANSPORTATION ALLOWANCE	34,000	25,944	(8,056)	-24%	28,799	24,222
	51290	UNEMPLOYMENT INSURANCE	71,847	73,419	1,572	2%	67,559	48,243
	51299	**BENEFITS EXPENSE**	**4,711,182**	**4,016,507**	**(694,674)**	**-15%**	**4,315,751**	**3,058,865**
	51310	WORKPLACE BENEFITS	56,400	60,150	3,750	7%	58,052	11,774
	51340	HUMAN RESOURCES POOLED EXP	111,300	115,700	4,400	4%	68,911	40,266
	51405	MEETING SUPPORT EXPENSES	9,950	9,950	(0)	0%	7,592	6,302
	51409	RENT EXPENSE	-	-			1,302,980	598,595
	51410	RENT	960,000	923,055	(36,945)	-4%	415,523	83,520
	51411	MOVE/DOWNSIZING EXPENSES	28,208	-	(28,208)	-100%	36,887	24,906
	51413	RENT - CONFERENCE CENTER	-	-			(33,800)	(19,100)
	51420	PERSONAL PROP TAXES-WSBA	8,400	6,500	(1,900)	-23%	6,195	4,716
	51430	FURNITURE, MAINT, LH IMP	75,617	48,450	(27,167)	-36%	32,987	40,629
	51435	SAFETY & SECURITY	-	10,420	10,420		-	-
	51440	OFFICE SUPPLIES & EQUIP	22,164	19,635	(2,529)	-11%	16,455	11,093
	51450	FURN, LH IMP, & OFFICE EQUIP DEPREC	159,628	224,084	64,456	40%	115,775	76,202
	51470	COMPUTER HARDWARE DEPREC	42,000	47,971	5,971	14%	39,315	25,700
	51480	COMPUTER SOFTWARE DEPREC	49,339	36,319	(13,020)	-26%	69,220	32,523
	51500	INSURANCE	288,200	273,491	(14,709)	-5%	265,583	173,680
	51501	WORK HOME FURNITURE & EQUIP	14,000	10,500	(3,500)	-25%	3,996	1,541
	51505	PROFESSIONAL FEES-AUDIT	41,000	43,500	2,500	6%	38,400	36,577
	51510	PROFESSIONAL FEES- LEGAL	200,000	250,000	50,000	25%	101,591	106,115
	51512	ONLINE LEGAL RESEARCH	86,000	89,000	3,000	3%	26,439	58,316
	51513	ACCOMODATIONS FUND	6,500	6,500	-	0%	-	-
	51514	TRANSLATION SERVICES	12,000	25,000	13,000	108%	6,814	4,163
	51515	TELEPHONE & INTERNET	33,600	33,600	-	0%	32,390	21,880
	51520	POSTAGE - GENERAL	15,500	12,000	(3,500)	-23%	8,796	4,629
	51525	RECORDS MANAGEMENT	28,849	7,500	(21,349)	-74%	62,062	23,060
	51530	BANK FEES (INDIRECT)	30,000	27,000	(3,000)	-10%	23,638	8,181
	51620	PRODUCTION MAINT & SUPPLIES	13,000	13,250	250	2%	8,976	8,012
	51710	COMPUTER POOLED EXPENSES	1,478,500	2,527,807	1,049,307	71%	1,141,736	979,297
	51810	GAIN (LOSS) ON ASSETS	-	-	-		10,667	1,396
	51900	**OTHER INDIRECT EXPENSE**	**3,770,155**	**4,821,383**	**1,051,228**	28%	**3,867,178**	**2,363,974**
		TOTAL INDIRECT EXPENSES:	**23,140,350**	**22,981,465**	**(158,886)**	**-1%**	**21,908,556**	**15,171,774**

Washington State Bar Association
Budget Comparison

ACCESS TO JUSTICE

Cost Center	**FY26 FTE**	**1.64**
ATJ	**FY25 REFORECAST FTE**	**1.63**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	2,800	2,800	-	0%	1,588	1,342
	50110	STAFF CONFERENCE & TRAINING	2,495	4,400	1,905	76%	912	1,530
	52121	ATJ BOARD RETREAT	6,000	6,000	-	0%	2,718	5,117
	52125	LEADERSHIP TRAINING	6,000	10,000	4,000	67%	4,150	7,230
	52140	ATJ BOARD EXPENSE	58,500	58,500	-	0%	41,683	42,520
	52874	PUBLIC DEFENSE	4,000	4,000	-	0%	2,213	2,279
	58225	CONFERENCE/INSTITUTE EXPENSE	30,000	-	(30,000)	-100%	(135)	22,916
	58450	RECEPTION/FORUM EXPENSE	30,000	30,000	-	0%	9,497	17,314
	TOTAL DIRECT EXPENSES		**139,795**	**115,700**	**(24,095)**	**-17%**	**62,625**	**100,248**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	155,733	161,099	5,366	3%	138,676	105,928
	51299	BENEFITS EXPENSE	51,565	46,452	(5,113)	-10%	48,134	34,098
	51900	OTHER INDIRECT EXPENSE	42,302	56,473	14,171	33%	43,699	26,765
	TOTAL INDIRECT EXPENSES:		**249,600**	**264,024**	**14,424**	**6%**	**230,509**	**166,792**
TOTAL ALL EXPENSES:			**389,395**	**379,724**	**(9,671)**	**-2%**	**293,135**	**267,041**
NET INCOME (LOSS):			**(389,395)**	**(379,724)**	**9,671**	**-2%**	**(293,135)**	**(267,041)**

Washington State Bar Association
Budget Comparison

ADMISSIONS

Cost Center **FY26 FTE** **6.65**
ADMISS **FY25 REFORECAST FTE** **6.17**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40705	EXAM SOFTWARE REVENUE	27,500	9,500	(18,000)	-65%	30,615	8,150
	42207	BAR EXAM FEES	1,280,780	1,300,000	19,220	2%	1,176,215	1,345,085
	42230	BAR EXAM LATE FEES	98,200	95,000	(3,200)	-3%	56,700	67,200
	42232	HOUSE COUNSEL APPLICATION FEES	56,260	55,000	(1,260)	-2%	33,080	28,360
	42270	RULE 9/LEGAL INTERN FEES	12,500	13,000	500	4%	16,950	11,950
	42285	FOREIGN LAW CONSULTANT FEES	1,940	1,940	-	0%	3,100	970
	42287	SPECIAL ADMISSIONS	3,000	5,000	2,000	67%	6,435	6,590
	TOTAL REVENUE		**1,480,180**	**1,479,440**	**(740)**	**0%**	**1,323,095**	**1,468,305**
DIRECT EXPENSES:								
	50060	POSTAGE	2,000	2,900	900	45%	1,993	2,236
	50100	STAFF TRAVEL/PARKING	24,000	24,000	-	0%	20,487	8,264
	50110	STAFF CONFERENCE & TRAINING	10,100	11,000	900	9%	6,348	7,040
	50120	STAFF MEMBERSHIP DUES	495	495	-	0%	555	245
	50140	SUPPLIES	4,000	2,500	(1,500)	-38%	1,824	3,110
	52210	FACILITY, PARKING, FOOD	100,000	150,985	50,985	51%	125,601	43,083
	52215	EXAMINER FEES	44,500	43,750	(750)	-2%	31,500	21,750
	52221	UBE EXAMINATIONS	118,000	46,200	(71,800)	-61%	134,108	41,448
	52225	BOARD OF BAR EXAMINERS	42,500	45,000	2,500	6%	22,040	7,511
	52230	BAR EXAM PROCTORS	23,000	10,000	(13,000)	-57%	13,737	9,432
	52240	DISABILITY ACCOMMODATIONS	65,000	75,000	10,000	15%	73,578	28,934
	52245	CHARACTER & FITNESS INVESTI	1,000	1,500	500	50%	(59)	700
	52250	LAW SCHOOL VISITS	2,000	1,500	(500)	-25%	1,379	21
	53282	SOFTWARE HOSTING	45,609	45,000	(609)	-1%	43,806	29,928
	52270	DEPRECIATION-SOFTWARE	-	-	-		10,697	-
	TOTAL DIRECT EXPENSES		**482,204**	**459,830**	**(22,374)**	**-5%**	**487,593**	**203,702**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	531,757	580,575	48,818	9%	541,081	374,281
	51299	BENEFITS EXPENSE	187,665	178,629	(9,035)	-5%	170,209	126,845
	51900	OTHER INDIRECT EXPENSE	163,842	228,991	65,149	40%	180,597	105,735
	TOTAL INDIRECT EXPENSES:		**883,264**	**988,195**	**104,931**	**12%**	**891,887**	**606,862**
	TOTAL ALL EXPENSES:		**1,365,468**	**1,448,025**	**82,557**	**6%**	**1,379,480**	**810,564**
	NET INCOME (LOSS):		**114,712**	**31,415**	**(83,297)**	**-73%**	**(56,385)**	**657,741**

Washington State Bar Association
Budget Comparison

ADVANCEMENT FTE

Cost Center	**FY26 FTE**	**1.41**
ADV FTE	**FY25 REFORECAST FTE**	**1.96**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50110	STAFF CONFERENCE & TRAINING	3,300	6,600	3,300	100%	8,846	120
	TOTAL DIRECT EXPENSES		**3,300**	**6,600**	**3,300**	**100%**	**8,846**	**120**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	264,525	216,525	(48,000)	-18%	246,488	174,091
	51299	BENEFITS EXPENSE	74,703	50,531	(24,172)	-32%	68,782	48,669
	51900	OTHER INDIRECT EXPENSE	50,098	48,553	(1,545)	-3%	50,660	31,441
	TOTAL INDIRECT EXPENSES:		**389,327**	**315,609**	**(73,718)**	**-19%**	**365,930**	**254,201**
	TOTAL ALL EXPENSES:		**392,627**	**322,209**	**(70,418)**	**-18%**	**374,776**	**254,321**
	NET INCOME (LOSS):		**(392,627)**	**(322,209)**	**70,418**	**-18%**	**(374,776)**	**(254,321)**

Washington State Bar Association
Budget Comparison

BAR NEWS

Cost Center **FY26 FTE** **2.13**
BN **FY25 REFORECAST FTE** **2.13**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40900	ROYALTIES	2,000	2,000	-	0%	1,543	-
	42710	BNEWS DISPLAY ADVERTISING	405,000	405,000	-	0%	418,264	305,679
	42720	BNEWS SUBSCRIPT/SINGLE ISSUES	100	100	-	0%	108	108
	42730	BNEWS CLASSIFIED ADVERTISING	2,500	2,500	-	0%	2,761	2,872
	42760	JOB TARGET ADVERSTISING	180,000	120,000	(60,000)	-33%	152,139	63,116
	TOTAL REVENUE		**589,600**	**529,600**	**(60,000)**	**-10%**	**574,814**	**371,775**
DIRECT EXPENSES:								
	50060	POSTAGE	135,000	135,000	-	0%	122,543	91,121
	50070	PRINTING & COPYING	262,500	242,000	(20,500)	-8%	211,369	140,525
	50110	STAFF CONFERENCE & TRAINING	-	2,200	2,200		-	-
	50120	STAFF MEMBERSHIP DUES	150	220	70	47%	135	-
	50130	SUBSCRIPTIONS	225	225	-	0%	203	204
	50155	DIGITAL/ONLINE DEVELOPMENT	2,000	2,000	-	0%	572	903
	52710	GRAPHICS/ARTWORK	1,000	1,000	-	0%	1,103	75
	52750	EDITORIAL ADVIS COMMITTEE EXP	300	300	-	0%	20	-
	TOTAL DIRECT EXPENSES		**401,175**	**382,945**	**(18,230)**	**-5%**	**335,944**	**232,829**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	207,867	199,151	(8,716)	-4%	213,708	137,363
	51299	BENEFITS EXPENSE	67,753	59,029	(8,724)	-13%	70,936	42,804
	51900	OTHER INDIRECT EXPENSE	54,444	73,346	18,902	35%	59,554	34,041
	TOTAL INDIRECT EXPENSES:		**330,063**	**331,526**	**1,463**	**0%**	**344,199**	**214,209**
	TOTAL ALL EXPENSES:		**731,238**	**714,471**	**(16,767)**	**-2%**	**680,143**	**447,038**
	NET INCOME (LOSS):		**(141,638)**	**(184,871)**	**(43,233)**	**31%**	**(105,328)**	**(75,262)**

Washington State Bar Association
Budget Comparison

BOARD OF GOVERNORS

Cost Center **FY26 FTE** **1.73**
BOG **FY25 REFORECAST FTE** **1.40**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-	-	-	-
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	-	-	-		(0)	-
	50140	SUPPLIES	500	765	265	53%	610	84
	52125	LEADERSHIP TRAINING	15,000	15,000	-	0%	1,681	-
	52810	BOG MEETINGS	148,000	200,000	52,000	35%	164,195	89,738
	52820	BOG COMMITTEES' EXPENSES	2,000	5,000	3,000	150%	18	4,173
	52821	BOG RETREAT	40,000	40,000	-	0%	30,180	38,128
	52822	BOG CONFERENCE ATTENDANCE	39,500	56,500	17,000	43%	55,335	31,162
	52830	BOG TRAVEL & OUTREACH	50,000	45,000	(5,000)	-10%	28,413	15,111
	52880	BOG ELECTIONS	42,000	30,000	(12,000)	-29%	12,545	14,043
	52960	PRESIDENT'S DINNER	10,000	12,000	2,000	20%	11,129	0
	52812	NEW GOVERNOR ORIENTATION	10,000	7,000	(3,000)	-30%	2,570	177
	52823	PRESIDENTS PHOTO	3,300	3,300	-	0%	1,652	-
	TOTAL DIRECT EXPENSES		**360,300**	**414,565**	**54,265**	**15%**	**308,326**	**192,617**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	112,836	135,043	22,207	20%	103,300	85,994
	51299	BENEFITS EXPENSE	40,463	44,269	3,807	9%	30,140	31,180
	51900	OTHER INDIRECT EXPENSE	35,785	59,572	23,788	66%	40,219	27,673
	TOTAL INDIRECT EXPENSES:		**189,084**	**238,885**	**49,801**	**26%**	**173,659**	**144,848**
	TOTAL ALL EXPENSES:		**549,384**	**653,450**	**104,066**	**19%**	**481,985**	**337,465**
	NET INCOME (LOSS):		**(549,384)**	**(653,450)**	**(104,066)**	**19%**	**(481,985)**	**(337,465)**

Washington State Bar Association
Budget Comparison

CONFERENCE AND BROADCAST SERVICES

Cost Center	**FY26 FTE**	**0.55**
CBS	**FY25 REFORECAST FTE**	**0.00**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	TOTAL DIRECT EXPENSES		-	-	-		-	-
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	-	49,269	49,269		-	-
	51299	BENEFITS EXPENSE	-	14,930	14,930		-	-
	51900	OTHER INDIRECT EXPENSE	-	18,939	18,939		-	-
	TOTAL INDIRECT EXPENSES:		**-**	**83,138**	**83,138**		**-**	**-**
	TOTAL ALL EXPENSES:		**-**	**83,138**	**83,138**		**-**	**-**
	NET INCOME (LOSS):		**-**	**(83,138)**	**(83,138)**		**-**	**-**

CHARACTER & FITNESS BOARD

Cost Center **FY26 FTE** **0.85**
CFB **FY25 REFORECAST FTE** **0.75**

Washington State Bar Association
Budget Comparison

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	52235	CHARACTER & FITNESS BOARD EXP	18,000	12,000	(6,000)	-33%	2,064	5,219
	54310	COURT REPORTERS	15,000	11,050	(3,950)	-26%	687	4,748
	TOTAL DIRECT EXPENSES		**33,000**	**23,050**	**(9,950)**	**-30%**	**2,750**	**9,966**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	95,315	103,891	8,576	9%	95,864	64,139
	51299	BENEFITS EXPENSE	27,582	26,820	(762)	-3%	28,077	18,230
	51900	OTHER INDIRECT EXPENSE	19,170	29,270	10,099	53%	20,109	12,056
	TOTAL INDIRECT EXPENSES:		**142,068**	**159,981**	**17,913**	**13%**	**144,050**	**94,425**
	TOTAL ALL EXPENSES:		**175,068**	**183,031**	**7,963**	**5%**	**146,800**	**104,391**
	NET INCOME (LOSS):		**(175,068)**	**(183,031)**	**(7,963)**	**5%**	**(146,800)**	**(104,391)**

COMMUNICATION STRATEGIES

Cost Center		
COMM	FY26 FTE	5.39
	FY25 REFORECAST FTE	6.05

Washington State Bar Association
Budget Comparison

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	42570	50 YEAR MEMBER TRIBUTE LUNCH	100	1,000	900	900%	1,900	380
	44100	WSBA LOGO MERCHANDISE SALES	500	2,000	1,500	300%	2,414	1,462
	TOTAL REVENUE		**600**	**3,000**	**2,400**	**400%**	**4,314**	**1,842**
DIRECT EXPENSES:								
	50050	EQUIPMENT, HARDWARE & SOFTWARE	-	-	-		1	-
	50100	STAFF TRAVEL/PARKING	5,895	5,895	-	0%	3,213	1,507
	50110	STAFF CONFERENCE & TRAINING	11,100	11,300	200	2%	9,199	8,761
	50120	STAFF MEMBERSHIP DUES	1,800	1,800	-	0%	1,164	327
	50130	SUBSCRIPTIONS	4,000	4,520	520	13%	2,237	1,438
	52511	BAR LEADERS SUMMIT	35,000	35,000	-	0%	-	33,963
	52570	APEX	52,500	52,500	-	0%	47,315	55
	52573	50 YEAR MEMBER TRIBUTE LUNCH	35,000	38,000	3,000	9%	25,600	7,583
	52878	COMMUNICATIONS OUTREACH	15,000	15,000	-	0%	3,956	2,476
	54027	BAR OUTREACH	20,000	15,000	(5,000)	-25%	6,082	2,408
	54065	AMBASSADOR TRAINING & TOWN HALLS	-	10,000	10,000		-	-
	TOTAL DIRECT EXPENSES		**180,295**	**189,015**	**8,720**	**5%**	**98,767**	**58,518**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	465,232	417,995	(47,237)	-10%	344,958	251,881
	51299	BENEFITS EXPENSE	170,889	137,502	(33,387)	-20%	118,866	95,029
	51900	OTHER INDIRECT EXPENSE	154,640	185,603	30,963	20%	139,218	86,381
TOTAL INDIRECT EXPENSES:			**790,762**	**741,101**	**(49,661)**	**-6%**	**603,042**	**433,291**
TOTAL ALL EXPENSES:			**971,057**	**930,116**	**(40,941)**	**-4%**	**701,809**	**491,808**
NET INCOME (LOSS):			**(970,457)**	**(927,116)**	**43,341**	**-4%**	**(697,495)**	**(489,966)**

COMMUNICATION STRATEGIES FTE

Cost Center	**FY26 FTE**	**1.00**
COMM FTE	**FY25 REFORECAST FTE**	**1.00**

Washington State Bar Association
Budget Comparison

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	TOTAL DIRECT EXPENSES		**-**	**-**	**-**		**-**	**-**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	179,737	183,193	3,456	2%	171,493	124,414
	51299	BENEFITS EXPENSE	45,265	39,830	(5,435)	-12%	47,337	31,281
	51900	OTHER INDIRECT EXPENSE	25,560	34,435	8,874	35%	26,684	16,075
	TOTAL INDIRECT EXPENSES:		**250,562**	**257,458**	**6,896**	**3%**	**245,513**	**171,770**
	NET INCOME (LOSS):		**(250,562)**	**(257,458)**	**(6,896)**	**3%**	**(245,513)**	**(171,770)**

Washington State Bar Association
Budget Comparison

DISCIPLINE

Cost Center **FY26 FTE** **39.00**
DISC **FY25 REFORECAST FTE** **38.90**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	42450	AUDIT REVENUE	1,000	1,000	-	0%	170	468
	44350	RECOVERY OF DISCIPLINE COSTS	70,000	65,000	(5,000)	-7%	54,568	35,681
	44450	DISCIPLINE HISTORY SUMMARY	19,000	19,000	-	0%	18,510	14,340
	TOTAL REVENUE		**90,000**	**85,000**	**(5,000)**	**-6%**	**73,248**	**50,489**
DIRECT EXPENSES:								
	50080	PUBLICATIONS PRODUCTION	350	350	-	0%	129	-
	50100	STAFF TRAVEL/PARKING	25,000	15,000	(10,000)	-40%	13,800	6,816
	50110	STAFF CONFERENCE & TRAINING	37,345	37,800	455	1%	28,498	19,731
	50120	STAFF MEMBERSHIP DUES	7,090	7,659	569	8%	6,418	6,840
	50160	TELEPHONE	4,000	3,000	(1,000)	-25%	2,740	1,509
	54310	COURT REPORTERS	60,000	66,200	6,200	10%	61,666	25,861
	54320	OUTSIDE COUNSEL EXPENSES	1,000	500	(500)	-50%	250	-
	54360	LITIGATION EXPENSES	40,000	30,000	(10,000)	-25%	43,226	7,802
	54370	DISABILITY EXPENSES	15,000	15,000	-	0%	7,026	4,499
	54400	TRANSLATION SERVICES	12,000	10,000	(2,000)	-17%	9,448	2,905
	TOTAL DIRECT EXPENSES		**201,785**	**185,509**	**(16,276)**	**-8%**	**173,200**	**75,963**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	4,053,832	4,131,360	77,528	2%	3,734,909	2,628,417
	51299	BENEFITS EXPENSE	1,272,455	1,139,859	(132,595)	-10%	1,115,581	821,766
	51900	OTHER INDIRECT EXPENSE	995,577	1,342,955	347,379	35%	1,015,908	624,606
	TOTAL INDIRECT EXPENSES:		**6,321,864**	**6,614,175**	**292,311**	**5%**	**5,866,398**	**4,074,788**
	TOTAL ALL EXPENSES:		**6,523,649**	**6,799,684**	**276,035**	**4%**	**6,039,598**	**4,150,752**
	NET INCOME (LOSS):		**(6,433,649)**	**(6,714,684)**	**(281,035)**	**4%**	**(5,966,350)**	**(4,100,263)**

Washington State Bar Association
Budget Comparison

DIVERSITY

Cost Center **FY26 FTE** **2.69**
DIV **FY25 REFORECAST FTE** **2.69**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40300	DONATIONS & GRANTS	135,000	135,000	-	0%	135,000	135,000
	TOTAL REVENUE		**135,000**	**135,000**	**-**	**0%**	**135,000**	**135,000**
DIRECT EXPENSES:								
	50033	CONSULTING SERVICES	7,000	3,000	(4,000)	-57%	58,775	45
	50100	STAFF TRAVEL/PARKING	3,700	3,700	-	0%	874	454
	50110	STAFF CONFERENCE & TRAINING	3,000	4,400	1,400	47%	2,154	162
	50120	STAFF MEMBERSHIP DUES	700	775	75	11%	90	655
	50145	SURVEYS	-	-	-		17,500	-
	52680	DEI COUNCIL	5,900	7,600	1,700	29%	3,948	792
	52681	DIVERSITY EVENTS & PROJECTS	43,100	37,100	(6,000)	-14%	11,016	8,058
	52687	INTERNAL DIVERSITY OUTREACH	7,500	6,000	(1,500)	-20%	-	-
	TOTAL DIRECT EXPENSES		**70,900**	**62,575**	**(8,325)**	**-12%**	**94,356**	**10,166**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	227,749	234,855	7,106	3%	149,846	147,634
	51299	BENEFITS EXPENSE	79,569	72,236	(7,333)	-9%	46,796	50,973
	51900	OTHER INDIRECT EXPENSE	68,757	92,629	23,872	35%	71,929	43,024
	TOTAL INDIRECT EXPENSES:		**376,075**	**399,721**	**23,645**	**6%**	**268,572**	**241,632**
	TOTAL ALL EXPENSES:		**446,975**	**462,296**	**15,320**	**3%**	**362,928**	**251,797**
	NET INCOME (LOSS):		**(311,975)**	**(327,296)**	**(15,320)**	**5%**	**(227,928)**	**(116,798)**

Washington State Bar Association
Budget Comparison

ENTITY REGULATION

				FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
Cost Center	**FY26 FTE**	**1.15**							
ER	**FY25 REFORECAST FTE**	**0.00**							
REVENUE:									
	42233	APPLICATION FEES		-	28,000	28,000		-	-
	42234	ANNUAL FEES		-	47,500	47,500		-	-
	TOTAL REVENUE			**-**	**75,500**	**75,500**		**-**	**-**
	50110	STAFF CONFERENCE & TRAINING		-	4,400	4,400		-	-
	52246	INVESTIGATION		-	9,600	9,600		-	-
	52692	OUTREACH & COMMUNICATION		-	10,000	10,000		-	-
	53282	SOFTWARE HOSTING		-	3,973	3,973		-	-
	TOTAL DIRECT EXPENSES			**-**	**27,973**	**27,973**		**-**	**-**
INDIRECT EXPENSES:									
	51199	SALARY EXPENSE		-	96,849	96,849		-	-
	51299	BENEFITS EXPENSE		-	30,357	30,357		-	-
	51900	OTHER INDIRECT EXPENSE		-	39,600	39,600		-	-
	TOTAL INDIRECT EXPENSES:			**-**	**166,806**	**166,806**		**-**	**-**
	TOTAL ALL EXPENSES:			**-**	**194,778**	**194,778**		**-**	**-**
	NET INCOME (LOSS):			**-**	**(119,278)**	**(119,278)**		**-**	**-**

Washington State Bar Association
Budget Comparison

FACILITIES AND OPERATIONS

Cost Center	**FY26 FTE**	**5.78**
FAC	**FY25 REFORECAST FTE**	**5.78**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	2,376	2,376	-	0%	2,376	1,507
	50110	STAFF CONFERENCE & TRAINING	677	-	(677)	-100%	10	-
	50120	STAFF MEMBERSHIP DUES	-	189	189		-	-
	TOTAL DIRECT EXPENSES		**3,053**	**2,565**	**(488)**	**-16%**	**2,386**	**1,507**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	427,125	406,195	(20,930)	-5%	403,747	288,610
	51299	BENEFITS EXPENSE	160,271	141,474	(18,797)	-12%	156,116	104,583
	51900	OTHER INDIRECT EXPENSE	147,739	199,033	51,294	35%	154,687	92,843
	TOTAL INDIRECT EXPENSES:		**735,135**	**746,702**	**11,567**	**2%**	**714,551**	**486,036**
	TOTAL ALL EXPENSES:		**738,188**	**749,267**	**11,079**	**2%**	**716,937**	**487,543**
	NET INCOME (LOSS):		**(738,188)**	**(749,267)**	**(11,079)**	**2%**	**(716,937)**	**(487,543)**

Washington State Bar Association
Budget Comparison

FINANCE

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
Cost Center	**FY26 FTE**	**6.92**						
FIN	**FY25 REFORECAST FTE**	**6.92**						
REVENUE:								
	40500	INTEREST - INVESTMENTS	600,000	600,000	-	0%	929,443	549,069
	TOTAL REVENUE		**600,000**	**600,000**	**-**	**0%**	**929,443**	**549,069**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	3,750	3,750	-	0%	3,765	3,090
	50110	STAFF CONFERENCE & TRAINING	500	500	-	0%	263	303
	50120	STAFF MEMBERSHIP DUES	670	670	-	0%	613	-
	TOTAL DIRECT EXPENSES		**4,920**	**4,920**	**-**	**0%**	**4,641**	**3,394**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	751,265	777,786	26,521	4%	703,552	523,920
	51299	BENEFITS EXPENSE	232,396	209,178	(23,218)	-10%	221,122	155,484
	51900	OTHER INDIRECT EXPENSE	176,878	238,288	61,411	35%	200,758	110,870
	51936	FACILITY RESERVE REBATE	-	-			15,520	-
	TOTAL INDIRECT EXPENSES:		**1,160,539**	**1,225,253**	**64,714**	**6%**	**1,140,952**	**790,275**
	TOTAL ALL EXPENSES:		**1,165,459**	**1,230,173**	**64,714**	**6%**	**1,145,593**	**793,669**
	NET INCOME (LOSS):		**(565,459)**	**(630,173)**	**(64,714)**	**11%**	**(216,150)**	**(244,599)**

Washington State Bar Association
Budget Comparison

FOUNDATION

Cost Center **FOUND**

FY26 FTE 1.05
FY25 REFORECAST FTE 1.05

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
50033		CONSULTING SERVICES	3,200	3,350	150	5%	3,000	3,200
50050		EQUIPMENT, HARDWARE & SOFTWARE	2,400	2,635	235	10%	2,175	1,757
50060		POSTAGE	400	400	-	0%	38	-
50070		PRINTING & COPYING	1,000	1,000	-	0%	452	-
50100		STAFF TRAVEL/PARKING	3,000	4,000	1,000	33%	269	54
50110		STAFF CONFERENCE & TRAINING	2,200	2,200	-	0%	1,473	-
50140		SUPPLIES	2,000	2,000	-	0%	81	103
52940		BOARD OF TRUSTEES	3,600	3,600	-	0%	1,245	492
	TOTAL DIRECT EXPENSES		**17,800**	**19,185**	**1,385**	**8%**	**8,733**	**5,607**
INDIRECT EXPENSES:								
51199		SALARY EXPENSE	106,460	108,755	2,296	2%	100,198	71,415
51299		BENEFITS EXPENSE	34,056	30,528	(3,528)	-10%	37,670	22,276
51900		OTHER INDIRECT EXPENSE	26,838	36,156	9,318	35%	28,230	16,784
	TOTAL INDIRECT EXPENSES:		**167,354**	**175,440**	**8,086**	**5%**	**166,098**	**110,475**
	TOTAL ALL EXPENSES:		**185,154**	**194,625**	**9,471**	**5%**	**174,831**	**116,082**
	NET INCOME (LOSS):		**(185,154)**	**(194,625)**	**(9,471)**	**5%**	**(174,831)**	**(116,082)**

Washington State Bar Association
Budget Comparison

HUMAN RESOURCES

Cost Center	**FY26 FTE**	**4.00**
HR	**FY25 REFORECAST FTE**	**4.00**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50033	CONSULTING SERVICES	10,000	1,000	(9,000)	-90%	-	-
	50100	STAFF TRAVEL/PARKING	300	300	-	0%	122	97
	50110	STAFF CONFERENCE & TRAINING	2,200	4,200	2,000	91%	-	171
	50120	STAFF MEMBERSHIP DUES	1,000	1,200	200	20%	1,036	528
	50130	SUBSCRIPTIONS	2,000	2,000	-	0%	1,904	993
	54512	STAFF TRAINING- GENERAL	36,800	29,300	(7,500)	-20%	10,295	926
	54520	RECRUITING AND ADVERTISING	8,000	8,750	750	9%	6,110	2,290
	54530	HR INFORMATION SYSTEM	50,000	65,950	15,950	32%	47,470	35,260
	54540	SALARY SURVEYS	1,000	3,000	2,000	200%	1,973	-
	54590	TRANSFER TO INDIRECT EXPENSE	(111,300)	(115,700)	(4,400)	4%	(68,911)	(40,266)
	TOTAL DIRECT EXPENSES		-	-	-		-	-
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	585,774	504,229	(81,545)	-14%	537,380	373,174
	51299	BENEFITS EXPENSE	115,845	98,098	(17,746)	-15%	146,941	94,524
	51925	ALLOWANCE FOR OPEN POSITIONS	(200,000)	(200,000)	-	0%	-	-
	51900	OTHER INDIRECT EXPENSE	102,241	137,739	35,498	35%	107,121	64,064
	TOTAL INDIRECT EXPENSES:		**603,860**	**540,066**	**(63,794)**	**-11%**	**791,442**	**531,762**
TOTAL ALL EXPENSES:			**603,860**	**540,066**	**(63,794)**	**-11%**	**791,442**	**531,762**
NET INCOME (LOSS):			**(603,860)**	**(540,066)**	**63,794**	**-11%**	**(791,442)**	**(531,762)**

Washington State Bar Association
Budget Comparison

LAW CLERK PROGRAM

Cost Center	**FY26 FTE**	**1.20**
CLERK	**FY25 REFORECAST FTE**	**1.23**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	42275	LAW CLERK FEES	234,000	220,000	(14,000)	-6%	201,068	238,826
	42286	LAW CLERK APPLICATION FEES	3,200	4,000	800	25%	5,000	3,600
	TOTAL REVENUE		**237,200**	**224,000**	**(13,200)**	**-6%**	**206,068**	**242,426**
DIRECT EXPENSES:								
	50015	DEPRECIATION	12,000	37,278	25,278	211%	-	-
	50100	STAFF TRAVEL/PARKING	-	-	-		24	-
	50130	SUBSCRIPTIONS	250	331	81	32%	276	-
	52245	CHARACTER & FITNESS INVESTI	100	100	-	0%	-	-
	53282	SOFTWARE HOSTING	681	700	19	3%	1,288	449
	52255	LAW CLERK BOARD	8,000	9,000	1,000	13%	5,716	2,727
	52258	LAW CLERK OUTREACH	30,000	20,000	(10,000)	-33%	5,476	-
	TOTAL DIRECT EXPENSES		**51,031**	**67,409**	**16,378**	**32%**	**12,781**	**3,176**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	113,225	108,121	(5,104)	-5%	102,505	75,874
	51299	BENEFITS EXPENSE	38,208	32,683	(5,526)	-14%	30,283	24,420
	51900	OTHER INDIRECT EXPENSE	31,439	41,322	9,882	31%	32,871	19,621
	TOTAL INDIRECT EXPENSES:		**182,873**	**182,126**	**(747)**	**0%**	**165,659**	**119,916**
TOTAL ALL EXPENSES:			**233,904**	**249,535**	**15,631**	**7%**	**178,440**	**123,091**
NET INCOME (LOSS):			**3,296**	**(25,535)**	**(28,831)**	**-875%**	**27,628**	**119,335**

Washington State Bar Association
Budget Comparison

LEGISLATIVE

Cost Center **FY26 FTE** **1.70**
LEG **FY25 REFORECAST FTE** **1.70**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	2,500	2,500	-	0%	83	565
	50110	STAFF CONFERENCE & TRAININC	2,200	2,200	-	0%	1,736	2,101
	50120	STAFF MEMBERSHIP DUES	200	215	15	8%	260	-
	50130	SUBSCRIPTIONS	2,000	2,000	-	0%	1,985	1,986
	50160	TELEPHONE	575	575	-	0%	577	384
	52660	JUD RECOMMEND COMMITTEE	2,250	3,250	1,000	44%	-	1,334
	54920	CONTRACT LOBBYIST	15,000	12,500	(2,500)	-17%	12,500	15,000
	54940	LEGISLATIVE COMMITTEE	1,250	1,250	-	0%	2	130
	54970	BOG LEGISLATIVE COMMITTEE	300	300	-	0%	-	-
	TOTAL DIRECT EXPENSES		**26,275**	**24,790**	**(1,485)**	**-6%**	**17,142**	**21,499**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	160,438	164,492	4,054	3%	152,110	107,712
	51299	BENEFITS EXPENSE	53,043	47,770	(5,273)	-10%	51,366	34,689
	51900	OTHER INDIRECT EXPENSE	43,453	58,539	15,086	35%	45,633	27,186
	TOTAL INDIRECT EXPENSES:		**256,933**	**270,801**	**13,867**	**5%**	**249,109**	**169,586**
	TOTAL ALL EXPENSES:		**283,208**	**295,591**	**12,382**	**4%**	**266,251**	**191,086**
	NET INCOME (LOSS):		**(283,208)**	**(295,591)**	**(12,382)**	**4%**	**(266,251)**	**(191,086)**

Washington State Bar Association
Budget Comparison

LEGAL LUNCHBOX

Cost Center	**FY26 FTE**	**0.45**
LLB	**FY25 REFORECAST FTE**	**0.43**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	41450	SPONSORSHIPS	9,000	9,000	-	0%	9,000	9,000
	43400	DIGITAL VIDEO SALES	25,000	25,000	-	0%	27,097	23,128
	TOTAL REVENUE		**34,000**	**34,000**	**-**	**0%**	**36,097**	**32,128**
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	4,414
	53731	INSURANCE REBATE	(3,375)	-	3,375	-100%	(2,528)	-
	TOTAL DIRECT EXPENSES		**4,725**	**8,100**	**3,375**	**71%**	**3,539**	**4,414**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	31,087	33,193	2,106	7%	29,074	20,656
	51299	BENEFITS EXPENSE	11,797	11,236	(561)	-5%	10,072	7,636
	51900	OTHER INDIRECT EXPENSE	10,991	15,496	4,505	41%	11,215	6,856
	51935	INSURANCE REBATE	(19,016)	-	19,016	-100%	(20,950)	-
	TOTAL INDIRECT EXPENSES:		**34,859**	**59,925**	**25,066**	**72%**	**29,411**	**35,147**
	TOTAL ALL EXPENSES:		**39,584**	**68,025**	**28,441**	**72%**	**32,950**	**39,561**
	NET INCOME (LOSS):		**(5,584)**	**(34,025)**	**(28,441)**	**509%**	**3,147**	**(7,433)**

Washington State Bar Association
Budget Comparison

LICENSING & MEMBERSHIP RECORDS

Cost Center **FY26 FTE** **4.83**
LICMR **FY25 REFORECAST FTE** **4.83**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	41100	STATUS CERTIFICATE FEES	27,000	29,000	2,000	7%	29,600	21,775
	42288	INVESTIGATION FEES	25,000	25,000	-	0%	27,700	18,200
	42290	PRO HAC VICE	425,000	435,000	10,000	2%	496,975	302,873
	45040	MEMBER CONTACT INFORMATION	5,000	5,000	-	0%	5,706	3,498
	45060	PHOTO BAR CARD SALES	200	260	60	30%	276	432
	TOTAL REVENUE		**482,200**	**494,260**	**12,060**	**3%**	**560,257**	**346,778**
DIRECT EXPENSES:								
	50033	CONSULTING SERVICES	6,000	-	(6,000)	-100%	6,000	6,000
	50060	POSTAGE	4,000	4,000	-	0%	14,599	3,725
	52246	INVESTIGATION	-	300	300		-	-
	53282	SOFTWARE HOSTING	18,380	18,380	-	0%	16,105	12,055
	TOTAL DIRECT EXPENSES		**28,380**	**22,680**	**(5,700)**	**-20%**	**36,704**	**21,780**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	515,705	512,035	(3,670)	-1%	421,349	343,811
	51299	BENEFITS EXPENSE	158,553	141,145	(17,409)	-11%	138,247	103,512
	51900	OTHER INDIRECT EXPENSE	123,457	166,320	42,863	35%	102,480	77,302
	TOTAL INDIRECT EXPENSES:		**797,715**	**819,499**	**21,785**	**3%**	**662,076**	**524,625**
	TOTAL ALL EXPENSES:		**826,095**	**842,179**	**16,085**	**2%**	**698,780**	**546,405**
	NET INCOME (LOSS):		**(343,895)**	**(347,919)**	**(4,025)**	**1%**	**(138,523)**	**(199,627)**

Washington State Bar Association
Budget Comparison

LICENSE FEES
Cost Center
LIC

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40600	LICENSE FEES	16,853,241	16,922,074	68,833	0%	16,279,888	10,893,115
	40625	LICENSE FEES - NEW ADMITTEES	429,375	465,192	35,817	8%	423,252	309,735
	40650	LICENSE FEES - LATE FEES	200,000	250,000	50,000	25%	383,255	453,642
	40675	LICENSE FEES - REINSTATEMENTS	10,000	15,000	5,000	50%	27,605	9,955
TOTAL REVENUE			**17,492,616**	**17,652,266**	**159,650**	**1%**	**17,113,999**	**11,666,447**
NET INCOME (LOSS):			**17,492,616**	**17,652,266**	**159,650**	**1%**	**17,113,999**	**11,666,447**

Washington State Bar Association
Budget Comparison

LIMITED LICENSE LEGAL TECHNICIAN PROGRAM

Cost Center **FY26 FTE** **0.45**
LLLT **FY25 REFORECAST FTE** **0.48**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	41800	SEMINAR REGISTRATIONS	7,000	-	(7,000)	-100%	1,045	5,600
	42281	LLLT LICENSE FEES	17,731	17,000	(731)	-4%	15,296	10,702
	42288	INVESTIGATION FEES	-	-	-		100	-
	42291	LLLT LATE LICENSE FEES	-	137	137		404	365
	45220	MCLE LATE FEES	300	150	(150)	-50%	450	150
	TOTAL REVENUE		**25,031**	**17,287**	**(7,744)**	**-31%**	**17,295**	**16,817**
DIRECT EXPENSES:								
	52683	LLLT BOARD	11,500	9,000	(2,500)	-22%	1,341	2,563
	52689	LLLT EDUCATION	1,000	1,000	-	0%	-	35
	TOTAL DIRECT EXPENSES		**12,500**	**10,000**	**(2,500)**	**-20%**	**1,341**	**2,598**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	55,689	44,756	(10,934)	-20%	51,982	39,342
	51299	BENEFITS EXPENSE	17,525	12,790	(4,735)	-27%	13,665	12,234
	51900	OTHER INDIRECT EXPENSE	14,569	15,496	926	6%	14,309	9,903
	TOTAL INDIRECT EXPENSES:		**87,784**	**73,042**	**(14,743)**	**-17%**	**79,955**	**61,479**
	TOTAL ALL EXPENSES:		**100,284**	**83,042**	**(17,243)**	**-17%**	**81,297**	**64,077**
	NET INCOME (LOSS):		**(75,253)**	**(65,755)**	**9,499**	**-13%**	**(64,002)**	**(47,260)**

Washington State Bar Association
Budget Comparison

LIMITED PRACTICE OFFICERS

Cost Center **FY26 FTE** **0.61**
LPO **FY25 REFORECAST FTE** **0.68**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	42288	INVESTIGATION FEES	300	1,000	700	233%	1,500	600
	45110	LPO EXAMINATION FEES	20,000	16,000	(4,000)	-20%	18,600	13,100
	45115	LPO EXAM LATE FEES	3,000	2,000	(1,000)	-33%	2,300	1,600
	45120	LPO LICENSE FEES	160,000	158,000	(2,000)	-1%	156,974	104,206
	45125	LPO LATE LICENSE FEES	2,000	2,000	-	0%	3,600	3,750
	45220	MCLE LATE FEES	4,000	3,000	(1,000)	-25%	3,150	1,800
	TOTAL REVENUE		**189,300**	**182,000**	**(7,300)**	**-4%**	**186,124**	**125,056**
DIRECT EXPENSES:								
	50050	EQUIPMENT, HARDWARE & SOFTWARE	-	-	-		1,240	-
	50070	PRINTING & COPYING	200	200	-	0%	123	34
	50140	SUPPLIES	200	100	(100)	-50%	113	-
	52210	FACILITY, PARKING, FOOD	9,500	9,500	-	0%	7,333	4,612
	52688	EXAM WRITING	19,000	15,000	(4,000)	-21%	8,400	8,400
	55130	LPO BOARD EXPENSES	4,000	4,000	-	0%	278	356
	55165	LPO OUTREACH	1,000	500	(500)	-50%	-	-
	53282	SOFTWARE HOSTING	3,404	3,404	-	0%	3,221	2,233
	TOTAL DIRECT EXPENSES		**37,304**	**32,704**	**(4,600)**	**-12%**	**20,708**	**15,636**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	66,043	61,284	(4,758)	-7%	70,170	44,066
	51299	BENEFITS EXPENSE	21,528	17,431	(4,097)	-19%	18,906	13,606
	51900	OTHER INDIRECT EXPENSE	17,637	21,005	3,369	19%	20,883	11,049
TOTAL INDIRECT EXPENSES:			**105,207**	**99,721**	**(5,486)**	**-5%**	**109,959**	**68,722**
TOTAL ALL EXPENSES:			**142,511**	**132,425**	**(10,086)**	**-7%**	**130,667**	**84,358**
NET INCOME (LOSS):			**46,789**	**49,575**	**2,786**	**6%**	**55,457**	**40,698**

Washington State Bar Association
Budget Comparison

MANDATORY CONTINUING LEGAL EDUCATION

Cost Center **FY26 FTE** **4.76**
MCLE **FY25 REFORECAST FTE** **4.76**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	45210	ACTIVITY APPLICATION FEE	600,000	670,000	70,000	12%	724,600	487,300
	45215	ACTIVITY APPLICATION LATE FEE	220,000	250,000	30,000	14%	266,650	192,750
	45220	MCLE LATE FEES	225,000	232,000	7,000	3%	266,925	252,200
	45230	ANNUAL ACCREDITED SPONSOR FEES	39,000	36,250	(2,750)	-7%	37,500	39,750
	45250	ATTENDANCE LATE FEES	120,000	120,000	-	0%	120,050	69,400
	45255	COMITY CERTIFICATES - REQUEST	13,800	13,000	(800)	-6%	13,497	12,675
	45260	COMITY CERTIFICATES - SUBMIT	16,000	17,000	1,000	6%	16,575	18,300
	TOTAL REVENUE		**1,233,800**	**1,338,250**	**104,450**	**8%**	**1,445,797**	**1,072,375**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	50	50	-	0%	-	-
	50110	STAFF CONFERENCE & TRAINING	4,600	4,400	(200)	-4%	3,564	-
	50120	STAFF MEMBERSHIP DUES	500	525	25	5%	500	500
	55210	MCLE BOARD EXPENSES	4,000	6,000	2,000	50%	-	1,806
	55220	DEPRECIATION-SOFTWARE	142,183	142,057	(126)	0%	124,381	96,096
	TOTAL DIRECT EXPENSES		**151,333**	**153,032**	**1,699**	**1%**	**128,445**	**98,402**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	400,391	412,275	11,884	3%	445,511	280,754
	51299	BENEFITS EXPENSE	136,403	125,149	(11,254)	-8%	143,462	89,770
	51900	OTHER INDIRECT EXPENSE	121,923	163,909	41,986	34%	157,394	76,532
TOTAL INDIRECT EXPENSES:			**658,717**	**701,333**	**42,617**	**6%**	**746,368**	**447,055**
TOTAL ALL EXPENSES:			**810,050**	**854,365**	**44,316**	**5%**	**874,813**	**545,458**
NET INCOME (LOSS):			**423,750**	**483,885**	**60,134**	**14%**	**570,984**	**526,917**

Washington State Bar Association
Budget Comparison

MEMBER WELLNESS PROGRAM

Cost Center	**FY26 FTE**	**1.48**
MWP	**FY25 REFORECAST FTE**	**1.48**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40205	DIVERSION	10,000	9,000	(1,000)	-10%	11,050	1,500
	TOTAL REVENUE		**10,000**	**9,000**	**(1,000)**	**-10%**	**11,050**	**1,500**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	1,000	1,200	200	20%	-	26
	50110	STAFF CONFERENCE & TRAINING	4,400	5,500	1,100	25%	527	75
	50120	STAFF MEMBERSHIP DUES	800	500	(300)	-38%	267	463
	50130	SUBSCRIPTIONS	1,455	1,400	(55)	-4%	1,324	883
	54715	MEMBER WELL-BEING TASK FORCE	4,250	4,500	250	6%	1,000	1,042
	TOTAL DIRECT EXPENSES		**11,905**	**13,100**	**1,195**	**10%**	**3,117**	**2,489**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	144,902	149,311	4,409	3%	138,488	97,435
	51299	BENEFITS EXPENSE	47,310	42,656	(4,654)	-10%	59,180	30,821
	51900	OTHER INDIRECT EXPENSE	37,829	50,963	13,134	35%	39,832	23,640
	TOTAL INDIRECT EXPENSES:		**230,041**	**242,930**	**12,889**	**6%**	**237,499**	**151,895**
	TOTAL ALL EXPENSES:		**241,946**	**256,030**	**14,084**	**6%**	**240,617**	**154,384**
	NET INCOME (LOSS):		**(231,946)**	**(247,030)**	**(15,084)**	**7%**	**(229,567)**	**(152,884)**

Washington State Bar Association
Budget Comparison

MEMBER SERVICES & ENGAGEMENT

Cost Center **FY26 FTE** **2.45**
MSE **FY25 REFORECAST FTE** **2.45**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40900	ROYALTIES	10,800	10,800	-	0%	12,767	11,150
	41450	SPONSORSHIPS	2,500	2,500	-	0%	2,566	2,000
	41800	SEMINAR REGISTRATIONS	3,000	2,000	(1,000)	-33%	1,980	-
	TOTAL REVENUE		**16,300**	**15,300**	**(1,000)**	**-6%**	**17,313**	**13,150**
DIRECT EXPENSES:								
	50070	PRINTING & COPYING	1,600	1,600	-	0%	-	1,442
	50085	YLL SECTION PROGRAM	1,300	1,300	-	0%	-	585
	50095	CLE COMPS	1,000	-	(1,000)	-100%	-	-
	50100	STAFF TRAVEL/PARKING	3,500	3,500	-	0%	20	82
	50110	STAFF CONFERENCE & TRAINING	2,200	2,700	500	23%	339	1,058
	50120	STAFF MEMBERSHIP DUES	450	1,020	570	127%	150	390
	50130	SUBSCRIPTIONS	350	400	50	14%	-	350
	54391	LAW LIBRARY DESKBOOK ACCESS	10,000	10,000	-	0%	-	9,311
	54610	LIBRARY MATERIALS/RESOURCES	4,000	4,000	-	0%	250	209
	55266	NEW LAWYER OUTREACH EVENTS	5,000	5,000	-	0%	2,029	3,519
	55270	NEW LAWYERS COMMITTEE	15,000	15,000	-	0%	2,584	778
	55970	MEMBER ENGAGEMENT COUNCIL	500	500	-	0%	-	-
	55981	SMALL TOWN AND RURAL COUNCIL OUTREACH AND ACTIVITIES	65,000	70,000	5,000	8%	29,282	45,000
	55980	SMALL TOWN AND RURAL COUNCIL	7,500	7,500	-	0%	55	-
	57460	LAW SCHOOL OUTREACH	500	500	-	0%	-	-
	58175	AWARDS	-	1,000	1,000		-	-
	58450	RECEPTION/FORUM EXPENSE	1,000	1,000	-	0%	149	200
	TOTAL DIRECT EXPENSES		**118,900**	**125,020**	**6,120**	**5%**	**34,857**	**62,925**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	167,441	165,619	(1,822)	-1%	159,996	96,935
	51299	BENEFITS EXPENSE	65,553	59,059	(6,493)	-10%	53,060	40,093
	51900	OTHER INDIRECT EXPENSE	62,623	84,365	21,742	35%	65,742	39,242
	TOTAL INDIRECT EXPENSES:		**295,617**	**309,043**	**13,426**	**5%**	**278,797**	**176,270**
	TOTAL ALL EXPENSES:		**414,517**	**434,063**	**19,546**	**5%**	**313,654**	**239,195**
	NET INCOME (LOSS):		**(398,217)**	**(418,763)**	**(20,546)**	**5%**	**(296,341)**	**(226,045)**

Washington State Bar Association
Budget Comparison

MINI CLE

Cost Center	**FY26 FTE**	**0.96**
MINI	**FY25 REFORECAST FTE**	**0.92**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	TOTAL DIRECT EXPENSES		-	-	-		-	-
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	71,340	76,520	5,180	7%	67,856	48,052
	51299	BENEFITS EXPENSE	26,074	24,764	(1,310)	-5%	21,787	16,997
	51900	OTHER INDIRECT EXPENSE	23,516	33,057	9,542	41%	24,750	14,657
	TOTAL INDIRECT EXPENSES:		**120,930**	**134,341**	**13,411**	**11%**	**114,393**	**79,706**
	NET INCOME (LOSS):		**(120,930)**	**(134,341)**	**(13,411)**	**11%**	**(114,393)**	**(79,706)**

Washington State Bar Association
Budget Comparison

NEW MEMBER EDUCATION

Cost Center	**FY26 FTE**	**0.87**
NME	**FY25 REFORECAST FTE**	**0.84**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40950	NME PRODUCT SALES	150,000	120,000	(30,000)	-20%	114,482	110,368
	41800	SEMINAR REGISTRATIONS	13,000	10,000	(3,000)	-23%	16,455	19,062
	47100	TRIAL ADVOCACY PROGRAM	15,000	12,000	(3,000)	-20%	12,098	-
	TOTAL REVENUE		**178,000**	**142,000**	**(36,000)**	**-20%**	**143,035**	**129,445**
DIRECT EXPENSES:								
	55265	SPEAKERS & PROGRAM DEVELOPMENT	575	500	(75)	-13%	-	-
	57320	TRIAL ADVOCACY EXPENSES	2,025	3,200	1,175	58%	1,254	-
	TOTAL DIRECT EXPENSES		**2,600**	**3,700**	**1,100**	**42%**	**1,254**	**-**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	63,225	66,306	3,081	5%	58,755	42,283
	51299	BENEFITS EXPENSE	23,475	22,014	(1,461)	-6%	20,580	15,270
	51900	OTHER INDIRECT EXPENSE	21,471	29,958	8,488	40%	22,430	13,475
	TOTAL INDIRECT EXPENSES:		**108,171**	**118,278**	**10,108**	**9%**	**101,764**	**71,027**
	TOTAL ALL EXPENSES:		**110,771**	**121,978**	**11,208**	**10%**	**103,019**	**71,027**
	NET INCOME (LOSS):		**67,229**	**20,022**	**(47,208)**	**-70%**	**40,017**	**58,418**

Washington State Bar Association
Budget Comparison

OFFICE OF GENERAL COUNSEL

Cost Center	**FY26 FTE**	**6.12**
OGC	**FY25 REFORECAST FTE**	**6.47**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 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	-	0%	-	2,226
	50110	STAFF CONFERENCE & TRAINING	6,215	10,250	4,035	65%	3,094	363
	50120	STAFF MEMBERSHIP DUES	2,090	2,500	410	20%	1,075	1,825
	52240	DISABILITY ACCOMMODATIONS	6,000	2,500	(3,500)	-58%	532	667
	54360	LITIGATION EXPENSES	1,000	1,000	-	0%	3	148
	55419	COURT RULES COMMITTEE	1,000	1,000	-	0%	-	-
	55615	WILLS	2,000	1,000	(1,000)	-50%	-	-
	55620	CUSTODIANSHIP	5,000	5,000	-	0%	125	201
	TOTAL DIRECT EXPENSES		**26,805**	**26,750**	**(55)**	**0%**	**4,829**	**5,355**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	682,130	718,300	36,170	5%	700,467	445,570
	51299	BENEFITS EXPENSE	210,435	187,732	(22,703)	-11%	180,093	134,655
	51900	OTHER INDIRECT EXPENSE	158,347	210,741	52,394	33%	162,422	97,124
TOTAL INDIRECT EXPENSES:			**1,050,911**	**1,116,772**	**65,861**	**6%**	**1,042,982**	**677,348**
TOTAL ALL EXPENSES:			**1,077,716**	**1,143,522**	**65,806**	**6%**	**1,047,812**	**682,704**
NET INCOME (LOSS):			**(1,077,716)**	**(1,143,522)**	**(65,806)**	**6%**	**(1,047,070)**	**(682,434)**

Washington State Bar Association
Budget Comparison

OFFICE OF THE EXECUTIVE DIRECTOR

Cost Center **FY26 FTE** **4.23**
OED **FY25 REFORECAST FTE** **3.90**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	2,000	2,000	-	0%	2,485	1,507
	50110	STAFF CONFERENCE & TRAINING	8,800	13,300	4,500	51%	9,179	10,846
	50120	STAFF MEMBERSHIP DUES	2,175	1,335	(840)	-39%	1,240	1,120
	52125	LEADERSHIP TRAINING	20,000	20,000	-	0%	16,016	5,122
	52585	WASHINGTON LEADERSHIP INSTITUTE	100,000	100,000	-	0%	80,000	100,000
	52840	ED TRAVEL & OUTREACH	6,000	6,000	-	0%	5,601	2,129
	TOTAL DIRECT EXPENSES		**138,975**	**142,635**	**3,660**	**3%**	**114,521**	**120,724**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	602,222	643,856	41,634	7%	490,689	406,627
	51299	BENEFITS EXPENSE	153,250	142,505	(10,745)	-7%	134,228	110,270
	51900	OTHER INDIRECT EXPENSE	99,685	145,659	45,974	46%	77,730	67,735
	TOTAL INDIRECT EXPENSES:		**855,157**	**932,020**	**76,863**	**9%**	**702,647**	**584,632**
	TOTAL ALL EXPENSES:		**994,132**	**1,074,655**	**80,523**	**8%**	**817,168**	**705,357**
	NET INCOME (LOSS):		**(994,132)**	**(1,074,655)**	**(80,523)**	**8%**	**(817,168)**	**(705,357)**

Washington State Bar Association
Budget Comparison

OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD

Cost Center **FY26 FTE** **1.30**
OGCDB **FY25 REFORECAST FTE** **1.30**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50110	STAFF CONFERENCE & TRAINING	2,000	2,200	200	10%	-	-
	50120	STAFF MEMBERSHIP DUES	100	100	-	0%	-	-
	54310	COURT REPORTERS	25,000	33,100	8,100	32%	44,538	17,271
	55310	DISCIPLINARY BOARD EXPENSES	5,000	3,000	(2,000)	-40%	797	868
	55320	CHIEF HEARING OFFICER	40,000	41,200	1,200	3%	39,996	26,664
	55330	HEARING OFFICER EXPENSES	4,000	4,000	-	0%	874	79
	55340	HEARING OFFICER TRAINING	1,000	1,000	-	0%	-	-
	55370	APPOINTED COUNSEL	50,400	50,645	245	0%	49,600	33,600
	55380	DISCIPLINARY SELECTION PANEL	1,000	1,000	-	0%	-	-
	TOTAL DIRECT EXPENSES		**128,500**	**136,245**	**7,745**	**6%**	**135,804**	**78,482**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	125,704	128,774	3,070	2%	135,940	86,136
	51299	BENEFITS EXPENSE	41,128	37,003	(4,124)	-10%	37,123	27,198
	51900	OTHER INDIRECT EXPENSE	33,228	44,765	11,537	35%	37,512	20,803
	TOTAL INDIRECT EXPENSES:		**200,060**	**210,543**	**10,482**	**5%**	**210,574**	**134,137**
	TOTAL ALL EXPENSES:		**328,560**	**346,788**	**18,227**	**6%**	**346,378**	**212,619**
	NET INCOME (LOSS):		**(328,560)**	**(346,788)**	**(18,227)**	**6%**	**(346,378)**	**(212,619)**

Washington State Bar Association
Budget Comparison

PRACTICE OF LAW BOARD

Cost Center **FY26 FTE** **0.50**
PLB **FY25 REFORECAST FTE** **0.35**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	-	200	200		-	-
	55510	PRACTICE OF LAW BOARD	16,000	16,000	-	0%	1,157	523
	TOTAL DIRECT EXPENSES		**16,000**	**16,200**	**200**	**1%**	**1,157**	**523**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	44,050	54,953	10,903	25%	48,544	29,310
	51299	BENEFITS EXPENSE	15,037	14,910	(127)	-1%	18,779	9,876
	51900	OTHER INDIRECT EXPENSE	11,502	17,217	5,715	50%	14,695	7,950
	TOTAL INDIRECT EXPENSES:		**70,590**	**87,080**	**16,491**	**23%**	**82,019**	**47,136**
	TOTAL ALL EXPENSES:		**86,590**	**103,280**	**16,691**	**19%**	**83,176**	**47,660**
	NET INCOME (LOSS):		**(86,590)**	**(103,280)**	**(16,691)**	**19%**	**(83,176)**	**(47,660)**

Washington State Bar Association
Budget Comparison

PRACTICE MANAGEMENT ASSISTANCE

Cost Center	**FY26 FTE**	**0.95**						
PMA	**FY25 REFORECAST FTE**	**0.95**						
			FY2025 Reforecast	**FY2026 Budget**	**FY25 vs. FY26 Comparison**	**% Change**	**FY2024 Actuals YTD**	**FY2025 Actuals YTD**
REVENUE:								
	40900	ROYALTIES	62,000	62,000	-	0%	69,581	50,570
	TOTAL REVENUE		**62,000**	**62,000**	**-**	**0%**	**69,581**	**50,570**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	1,000	2,500	1,500	150%	386	265
	50110	STAFF CONFERENCE & TRAINING	2,500	2,400	(100)	-4%	-	3,003
	50120	STAFF MEMBERSHIP DUES	150	295	145	97%	150	-
	54645	LEGAL TECH TASK FORCE	5,000	3,500	(1,500)	-30%	-	2,750
	55250	VLEX FASTCASE	85,000	87,000	2,000	2%	84,042	84,568
	TOTAL DIRECT EXPENSES		**93,650**	**95,695**	**2,045**	**2%**	**84,578**	**90,586**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	89,534	92,930	3,396	4%	83,474	60,005
	51299	BENEFITS EXPENSE	29,659	26,882	(2,777)	-9%	24,903	19,348
	51900	OTHER INDIRECT EXPENSE	24,282	32,713	8,431	35%	25,523	15,129
	TOTAL INDIRECT EXPENSES:		**143,475**	**152,525**	**9,050**	**6%**	**133,901**	**94,482**
	TOTAL ALL EXPENSES:		**237,125**	**248,220**	**11,095**	**5%**	**218,479**	**185,068**
	NET INCOME (LOSS):		**(175,125)**	**(186,220)**	**(11,095)**	**6%**	**(148,897)**	**(134,499)**

Washington State Bar Association
Budget Comparison

PROFESSIONAL RESPONSIBILITY PROGRAM

Cost Center	**FY26 FTE**	**1.08**
PRP	**FY25 REFORECAST FTE**	**1.08**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	4,000	4,000	-	0%	1,761	778
	50110	STAFF CONFERENCE & TRAINING	2,200	2,400	200	9%	-	1,542
	50120	STAFF MEMBERSHIP DUES	500	590	90	18%	400	590
	55610	CPE COMMITTEE	1,000	1,000	-	0%	386	286
	TOTAL DIRECT EXPENSES		**7,700**	**7,990**	**290**	**4%**	**2,547**	**3,196**
INDIRECT EXPENSES:					-			
	51199	SALARY EXPENSE	141,621	143,536	1,915	1%	138,684	95,410
	51299	BENEFITS EXPENSE	40,867	36,061	(4,806)	-12%	62,414	26,720
	51900	OTHER INDIRECT EXPENSE	27,605	37,190	9,584	35%	29,391	17,257
	TOTAL INDIRECT EXPENSES:		**210,093**	**216,787**	**6,693**	**3%**	**230,489**	**139,387**
	TOTAL ALL EXPENSES:		**217,793**	**224,777**	**6,983**	**3%**	**233,036**	**142,583**
	NET INCOME (LOSS):		**(217,793)**	**(224,777)**	**(6,983)**	**3%**	**(233,036)**	**(142,583)**

Washington State Bar Association
Budget Comparison

PUBLIC SERVICE PROGRAMS

Cost Center **FY26 FTE** **1.62**
PSP **FY25 REFORECAST FTE** **1.62**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40300	DONATIONS & GRANTS	135,280	132,635	(2,645)	-2%	130,000	134,832
	TOTAL REVENUE		**135,280**	**132,635**	**(2,645)**	**-2%**	**130,000**	**134,832**
DIRECT EXPENSES:								
	50037	DONATIONS/SPONSORSHIPS/GRANTS	300,000	-	(300,000)	-100%	278,889	238,011
	50100	STAFF TRAVEL/PARKING	2,000	2,000	-	0%	333	142
	50110	STAFF CONFERENCE & TRAINING	2,200	3,200	1,000	45%	-	775
	52110	PRO BONO & PUBLIC SERVICE COMMITTEE	2,500	3,500	1,000	40%	782	323
	54130	PRO BONO OUTREACH	4,000	4,000	-	0%	1,978	1,087
	TOTAL DIRECT EXPENSES		**310,700**	**12,700**	**(298,000)**	**-96%**	**281,983**	**240,338**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	136,915	142,419	5,504	4%	117,051	90,900
	51299	BENEFITS EXPENSE	47,862	43,595	(4,267)	-9%	37,768	31,079
	51900	OTHER INDIRECT EXPENSE	41,408	55,784	14,376	35%	43,312	26,004
	TOTAL INDIRECT EXPENSES:		**226,185**	**241,799**	**15,613**	**7%**	**198,131**	**147,983**
	TOTAL ALL EXPENSES:		**536,885**	**254,499**	**(282,387)**	**-53%**	**480,114**	**388,321**
	NET INCOME (LOSS):		**(401,605)**	**(121,863)**	**279,742**	**-70%**	**(350,114)**	**(253,489)**

Washington State Bar Association
Budget Comparison

PUBLICATION & DESIGN SERVICES

Cost Center	**FY26 FTE**	**0.89**
PUB	**FY25 REFORECAST FTE**	**0.89**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50130	SUBSCRIPTIONS	200	200	-	0%	88	88
	54026	IMAGE LIBRARY	4,800	4,800	-	0%	4,752	4,756
	TOTAL DIRECT EXPENSES		**5,000**	**5,000**	**-**	**0%**	**4,840**	**4,844**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	76,345	70,644	(5,701)	-7%	76,767	54,682
	51299	BENEFITS EXPENSE	26,506	22,914	(3,592)	-14%	21,510	17,812
	51900	OTHER INDIRECT EXPENSE	22,749	30,647	7,898	35%	23,976	14,184
	TOTAL INDIRECT EXPENSES:		**125,600**	**124,205**	**(1,395)**	**-1%**	**122,253**	**86,678**
	TOTAL ALL EXPENSES:		**130,600**	**129,205**	**(1,395)**	**-1%**	**127,093**	**91,522**
	NET INCOME (LOSS):		**(130,600)**	**(129,205)**	**1,395**	**-1%**	**(127,093)**	**(91,522)**

Washington State Bar Association
Budget Comparison

REGULATORY SERVICES FTE

Cost Center	**FY26 FTE**	**2.05**
RSD FTE	**FY25 REFORECAST FTE**	**2.20**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	600	600	-	0%	438	265
	50110	STAFF CONFERENCE & TRAINING	8,400	11,500	3,100	37%	5,913	932
	50120	STAFF MEMBERSHIP DUES	490	490	-	0%	350	490
	TOTAL DIRECT EXPENSES		**9,490**	**12,590**	**3,100**	**33%**	**6,700**	**1,688**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	299,450	297,784	(1,666)	-1%	353,064	201,240
	51299	BENEFITS EXPENSE	84,363	70,359	(14,004)	-17%	102,161	55,789
	51900	OTHER INDIRECT EXPENSE	56,872	70,591	13,719	24%	69,609	35,924
	TOTAL INDIRECT EXPENSES:		**440,685**	**438,735**	**(1,950)**	**0%**	**524,834**	**292,953**
	TOTAL ALL EXPENSES:		**450,175**	**451,325**	**1,150**	**0%**	**531,535**	**294,641**
	NET INCOME (LOSS):		**(450,175)**	**(451,325)**	**(1,150)**	**0%**	**(531,535)**	**(294,641)**

Washington State Bar Association
Budget Comparison

REGULATORY REFORM

Cost Center	**FY26 FTE**	**0.90**
RR	**FY25 REFORECAST FTE**	**1.80**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
DIRECT EXPENSES:								
	50033	CONSULTING SERVICES	72,500	25,000	(47,500)	-66%	-	10,311
	50185	MEETING EXPENSE	-	2,000	2,000		-	2,098
	52691	OUTREACH EXPENSES	10,000	10,000	-	0%	-	-
	53282	SOFTWARE HOSTING	-	20,000	20,000		-	-
	TOTAL DIRECT EXPENSES		**82,500**	**57,000**	**(25,500)**	**-31%**	**-**	**12,409**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	157,764	119,875	(37,889)	-24%	-	87,449
	51299	BENEFITS EXPENSE	46,175	29,651	(16,524)	-36%	-	24,260
	51900	OTHER INDIRECT EXPENSE	32,589	30,991	(1,598)	-5%	-	15,301
	TOTAL INDIRECT EXPENSES:		**236,528**	**180,517**	**(56,011)**	**-24%**	**-**	**127,011**
	TOTAL ALL EXPENSES:		**319,028**	**237,517**	**(81,511)**	**-26%**	**-**	**139,420**
	NET INCOME (LOSS):		**(319,028)**	**(237,517)**	**81,511**	**-26%**	**-**	**(139,420)**

Washington State Bar Association
Budget Comparison

SECTIONS ADMINISTRATION

Cost Center **FY26 FTE** **2.53**
SECT **FY25 REFORECAST FTE** **2.53**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	48010	REIMBURSEMENTS FROM SECTIONS	275,000	275,000	-	0%	275,415	363,118
	TOTAL REVENUE		**275,000**	**275,000**	**-**	**0%**	**275,415**	**363,118**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	1,500	1,900	400	27%	59	60
	50120	STAFF MEMBERSHIP DUES	200	-	(200)	-100%	-	60
	50130	SUBSCRIPTIONS	-	-	-		331	-
	52540	SECTION/COMMITTEE CHAIR MTGS	700	500	(200)	-29%	80	89
	TOTAL DIRECT EXPENSES		**2,400**	**2,400**	**-**	**0%**	**470**	**209**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	169,092	174,309	5,217	3%	160,918	108,609
	51299	BENEFITS EXPENSE	67,073	61,514	(5,559)	-8%	67,620	43,010
	51900	OTHER INDIRECT EXPENSE	64,668	87,120	22,452	35%	69,223	40,860
	TOTAL INDIRECT EXPENSES:		**300,832**	**322,943**	**22,111**	**7%**	**297,761**	**192,480**
	TOTAL ALL EXPENSES:		**303,232**	**325,343**	**22,111**	**7%**	**298,231**	**192,689**
	NET INCOME (LOSS):		**(28,232)**	**(50,343)**	**(22,111)**	**78%**	**(22,816)**	**170,429**

Washington State Bar Association
Budget Comparison

TECHNOLOGY

Cost Center **FY26 FTE** **5.00**
TECH **FY25 REFORECAST FTE** **12.00**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50033	CONSULTING SERVICES	140,000	1,019,797	879,797	628%	270,160	101,256
	50100	STAFF TRAVEL/PARKING	1,000	1,000	-	0%	786	771
	50110	STAFF CONFERENCE & TRAINING	6,000	6,000	-	0%	823	1,091
	50120	STAFF MEMBERSHIP DUES	300	410	110	37%	120	-
	50160	TELEPHONE	90,000	90,000	-	0%	86,328	56,739
	55911	CLOUD INFRASTRUCTURE	130,000	130,000	-	0%	43,143	39,237
	56100	COMPUTER HARDWARE	66,200	65,000	(1,200)	-2%	64,018	60,179
	56150	COMPUTER SOFTWARE	530,000	518,000	(12,000)	-2%	268,912	295,950
	56225	HARDWARE SERVICE & WARRANTIES	50,000	50,000	-	0%	30,498	34,392
	56230	SOFTWARE MAINT & LICENSING	400,000	470,000	70,000	18%	338,290	340,918
	56550	THIRD PARTY SERVICES	65,000	177,600	112,600	173%	38,658	48,763
	56900	TRANSFER TO INDIRECT EXPENSES	(1,478,500)	(2,527,807)	(1,049,307)	71%	(1,141,736)	(979,297)
	TOTAL DIRECT EXPENSES		-	-	-		-	**(0)**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	1,422,045	629,276	(792,769)	-56%	1,419,189	935,789
	51299	BENEFITS EXPENSE	421,171	158,341	(262,830)	-62%	426,935	256,527
	51955	CAPITAL LABOR & OVERHEAD	(75,000)	-	75,000	-100%	(75,555)	(93,204)
	51900	OTHER INDIRECT EXPENSE	306,724	172,174	(134,551)	-44%	348,046	192,664
TOTAL INDIRECT EXPENSES:			**2,074,941**	**959,791**	**(1,115,150)**	**-54%**	**2,118,614**	**1,291,775**
TOTAL ALL EXPENSES:			**2,074,941**	**959,791**	**(1,115,150)**	**-54%**	**2,118,614**	**1,291,775**
NET INCOME (LOSS):			**(2,074,941)**	**(959,791)**	**1,115,150**	**-54%**	**(2,118,614)**	**(1,291,775)**

Washington State Bar Association
Budget Comparison

VOLUNTEER ENGAGEMENT

Cost Center **FY26 FTE** **1.70**
VE **FY25 REFORECAST FTE** **1.20**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50060	POSTAGE	600	600	-	0%	571	468
	50110	STAFF CONFERENCE & TRAINING	5,200	4,500	(700)	-13%	1,749	-
	50120	STAFF MEMBERSHIP DUES	450	385	(65)	-14%	300	300
	50130	SUBSCRIPTIONS	816	816	-	0%	815	716
	52520	ABA DELEGATES	16,000	18,000	2,000	13%	18,649	5,360
	52521	VOLUNTEER RECOGNITION	2,000	2,000	-	0%	-	-
	57450	REGULATORY SCHOOL	12,000	10,000	(2,000)	-17%	-	7,767
	TOTAL DIRECT EXPENSES		**37,066**	**36,301**	**(765)**	**-2%**	**22,084**	**14,611**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	127,293	149,220	21,927	17%	60,598	80,735
	51299	BENEFITS EXPENSE	43,900	45,777	1,876	4%	20,940	29,056
	51900	OTHER INDIRECT EXPENSE	37,063	58,539	21,477	58%	16,242	25,339
	TOTAL INDIRECT EXPENSES:		**208,256**	**253,536**	**45,280**	**22%**	**97,781**	**135,130**
	TOTAL ALL EXPENSES:		**245,322**	**289,837**	**44,515**	**18%**	**119,864**	**149,741**
	NET INCOME (LOSS):		**(245,322)**	**(289,837)**	**(44,515)**	**18%**	**(119,864)**	**(149,741)**

ATTACHMENT B

Washington State Bar Association Financial Summary
Fiscal Year 2026 Budget

Category	FY26 Budget Revenues	FY26 Budget Indirect Expenses	FY26 Budget Direct Expenses	FY26 Budget Total Expenses	FY26 Budget Net Result
Access to Justice	-	264,024	115,700	379,724	(379,724)
Admissions/Bar Exam	1,479,440	988,195	459,830	1,448,025	31,415
Advancement FTE	-	315,609	6,600	322,209	(322,209)
Bar News	529,600	331,526	382,945	714,471	(184,871)
Board of Governors	-	238,885	414,565	653,450	(653,450)
Conference and Broadcast Services	-	83,138	-	83,138	(83,138)
Character & Fitness Board	-	159,981	23,050	183,031	(183,031)
Communications Strategies	3,000	741,101	189,015	930,116	(927,116)
Communications Strategies FTE	-	257,458	-	257,458	(257,458)
Discipline	85,000	6,614,175	185,509	6,799,684	(6,714,684)
Diversity	135,000	399,721	62,575	462,296	(327,296)
Entity Regulation	75,500	166,806	27,973	194,778	(119,278)
Facilities and Operations	-	746,702	2,565	749,267	(749,267)
Finance	600,000	1,225,253	4,920	1,230,173	(630,173)
Foundation	-	175,440	19,185	194,625	(194,625)
Human Resources	-	540,066	-	540,066	(540,066)
Law Clerk Program	224,000	182,126	67,409	249,535	(25,535)
Legislative	-	270,801	24,790	295,591	(295,591)
Legal Lunchbox	34,000	59,925	8,100	68,025	(34,025)
Licensing and Membership Records	494,260	819,499	22,680	842,179	(347,919)
Licensing Fees	17,792,666	-	-	-	17,792,666
Limited License Legal Technician	17,287	73,042	10,000	83,042	(65,755)
Limited Practice Officers	182,000	99,721	32,704	132,425	49,575
Mandatory CLE	1,338,250	701,333	153,032	854,365	483,885
Member Wellness Program	9,000	242,930	13,100	256,030	(247,030)
Member Services & Engagement	15,300	309,043	125,020	434,063	(418,763)
Mini CLE	-	134,341	-	134,341	(134,341)
New Member Education	142,000	118,278	3,700	121,978	20,022
Office of General Counsel	-	1,116,772	26,750	1,143,522	(1,143,522)
Office of the Executive Director	-	932,020	142,635	1,074,655	(1,074,655)
OGC-Disciplinary Board	-	210,543	136,245	346,788	(346,788)
Practice of Law Board	-	87,080	16,200	103,280	(103,280)
Practice Management Assistance	62,000	152,525	95,695	248,220	(186,220)
Professional Responsibility Program	-	216,787	7,990	224,777	(224,777)
Public Service Programs	132,635	241,799	12,700	254,499	(121,863)
Publication and Design Services	-	124,205	5,000	129,205	(129,205)
Regulatory Services FTE	-	438,735	12,590	451,325	(451,325)
Regulatory Reform	-	180,517	57,000	237,517	(237,517)
Sections Administration	275,000	322,943	2,400	325,343	(50,343)
Technology	-	959,791	-	959,791	(959,791)
Volunteer Engagement	-	253,536	36,301	289,837	(289,837)
Subtotal General Fund	**23,625,938**	**21,496,370**	**2,906,473**	**24,402,843**	**(776,905)**
Expenses using reserve funds				(80,972)	80,972
Total General Fund - Net Result from Operations	**23,625,938**			**24,321,871**	**(695,933)**
CLE-Seminars and Products	1,491,745	1,048,807	313,153	1,361,960	129,785
CLE - Deskbooks	105,120	242,008	124,380	366,387	(261,267)
Total CLE	**1,596,865**	**1,290,814**	**437,533**	**1,728,347**	**(131,482)**
Total CLE Fund - Net Result from Operations	**1,596,865**			**1,728,347**	**(131,482)**
Total All Sections	**653,806**		**1,060,203**	**1,060,203**	**(406,398)**
Client Protection Fund-Restricted	**945,480**	**194,280**	**507,100**	**701,380**	**244,100**
Total CPF Fund - Net Result from Operations	**945,480**			**701,380**	**244,100**
Totals	**26,822,089**	**22,981,465**	**4,911,309**	**27,892,774**	**(1,070,685)**
Totals Net of Use of Reserve Funds	**26,822,089**	**22,981,465**	**4,911,309**	**27,811,802**	**(989,713)**

Washington State Bar Association
Budget Comparison

Cost Center			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
All	FY26 FTE	141.50						
	FY25 REFORECAST FTE	147.50						
Revenue	40200	COPY FEES	-	-	-		427	-
	40205	DIVERSION	10,000	9,000	(1,000)	-10%	11,050	1,500
	40210	RECORDS REQUEST FEES	-	-	-		315	270
	40300	DONATIONS & GRANTS	270,280	267,635	(2,645)	-1%	265,000	269,846
	40500	INTEREST - INVESTMENTS	802,050	800,000	(2,050)	0%	1,305,951	695,632
	40600	LICENSE FEES	16,853,241	17,062,474	209,233	1%	16,279,888	10,893,115
	40605	ENTITY LICENSE FEES	-	-	-		-	-
	40610	ENTITY LATE LICENSE FEES	-	-	-		-	-
	40625	LICENSE FEES - NEW ADMITTEES	429,375	465,192	35,817	8%	423,252	309,735
	40650	LICENSE FEES - LATE FEES	200,000	250,000	50,000	25%	383,255	453,642
	40675	LICENSE FEES - REINSTATEMENTS	10,000	15,000	5,000	50%	27,605	9,955
	40705	EXAM SOFTWARE REVENUE	27,500	9,500	(18,000)	-65%	30,615	8,150
	40800	PUBLICATIONS REVENUE	1,250	1,250	-	0%	1,949	2,279
	40900	ROYALTIES	74,800	74,800	-	0%	83,891	61,720
	40950	NME PRODUCT SALES	150,000	120,000	(30,000)	-20%	114,482	110,368
	41000	SHIPPING & HANDLING	210	210	-	0%	99	90
	41100	STATUS CERTIFICATE FEES	27,000	29,000	2,000	7%	29,600	21,775
	41450	SPONSORSHIPS	13,500	11,500	(2,000)	-15%	11,566	11,000
	41500	ANNUAL OR OTHER MEETING REV	5,575	4,700	(875)	-16%	4,710	-
	41650	RECEPTIONS REVENUE	-	-	-		2,500	-
	41700	CONFERENCES & INSTITUTES	3,738	2,793	(945)	-25%	3,739	-
	41800	SEMINAR REGISTRATIONS	748,000	742,535	(5,465)	-1%	671,186	403,821
	41805	MINI-CLE REVENUE	32,890	35,530	2,640	8%	32,152	24,265
	41825	SEMINAR REVENUE-OTHER	20,000	32,500	12,500	63%	51,802	14,600
	41850	SEMINAR SPLITS W/ CLE	(10,300)	(13,650)	(3,350)	33%	0	-
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		-	-
	41875	SEMINAR SPLITS W/ OTHERS	20,000	21,500	1,500	8%	32,231	-
	42207	BAR EXAM FEES	1,280,780	1,300,000	19,220	2%	1,176,215	1,345,085
	42230	BAR EXAM LATE FEES	98,200	95,000	(3,200)	-3%	56,700	67,200
	42232	HOUSE COUNSEL APPLICATION FEES	56,260	55,000	(1,260)	-2%	33,080	28,360
	42233	APPLICATION FEES	-	28,000	28,000		-	-
	42234	ANNUAL FEES	-	47,500	47,500		-	-
	42270	RULE 9/LEGAL INTERN FEES	12,500	13,000	500	4%	16,950	11,950
	42275	LAW CLERK FEES	234,000	220,000	(14,000)	-6%	201,068	238,826
	42281	LLLT LICENSE FEES	17,731	17,000	(731)	-4%	15,296	10,702
	42285	FOREIGN LAW CONSULTANT FEES	1,940	1,940	-	0%	3,100	970
	42286	LAW CLERK APPLICATION FEES	3,200	4,000	800	25%	5,000	3,600
	42287	SPECIAL ADMISSIONS	3,000	5,000	2,000	67%	6,435	6,590
	42288	INVESTIGATION FEES	25,300	26,000	700	3%	29,300	18,800
	42290	PRO HAC VICE	425,000	435,000	10,000	2%	496,975	302,873
	42291	LLLT LATE LICENSE FEES	-	137	137		404	365
	42450	AUDIT REVENUE	1,000	1,000	-	0%	170	468
	42570	50 YEAR MEMBER TRIBUTE LUNCH	100	1,000	900	900%	1,900	380
	42710	BNEWS DISPLAY ADVERTISING	405,000	405,000	-	0%	418,264	305,679
	42720	BNEWS SUBSCRIPT/SINGLE ISSUES	100	100	-	0%	108	108
	42730	BNEWS CLASSIFIED ADVERTISING	2,500	2,500	-	0%	2,761	2,872
	42760	JOB TARGET ADVERTISING	180,000	120,000	(60,000)	-33%	152,139	63,116
	43100	DESKBOOK SALES	30,000	5,120	(24,880)	-83%	18,240	7,495
	43200	COURSEBOOK SALES	3,500	3,500	-	0%	1,060	650
	43400	DIGITAL VIDEO SALES	870,000	900,000	30,000	3%	1,057,552	696,609
	43450	SECTION PUBLICATION SALES	1,000	-	(1,000)	-100%	630	90
	43455	LEXIS/NEXIS ROYALTIES	75,000	75,000	-	0%	69,907	32,457
	43525	CASEMAKER ROYALTIES	25,000	25,000	-	0%	37,575	17,350
	44100	WSBA LOGO MERCHANDISE SALES	500	2,000	1,500	300%	2,414	1,462
	44350	RECOVERY OF DISCIPLINE COSTS	70,000	65,000	(5,000)	-7%	54,568	35,681
	44450	DISCIPLINE HISTORY SUMMARY	19,000	19,000	-	0%	18,510	14,340
	44820	CPF RESTITUTION	10,000	10,000	-	0%	27,839	18,812
	44840	CPF MEMBER ASSESSMENTS	720,540	735,480	14,940	2%	548,235	711,840
	45040	MEMBER CONTACT INFORMATION	5,000	5,000	-	0%	5,706	3,498
	45060	PHOTO BAR CARD SALES	200	260	60	30%	276	432
	45110	LPO EXAMINATION FEES	20,000	16,000	(4,000)	-20%	18,600	13,100
	45115	LPO EXAM LATE FEES	3,000	2,000	(1,000)	-33%	2,300	1,600
	45120	LPO LICENSE FEES	160,000	158,000	(2,000)	-1%	156,974	104,206
	45125	LPO LATE LICENSE FEES	2,000	2,000	-	0%	3,600	3,750
	45210	ACTIVITY APPLICATION FEE	600,000	670,000	70,000	12%	724,600	487,300
	45215	ACTIVITY APPLICATION LATE FEE	220,000	250,000	30,000	14%	266,650	192,750
	45220	MCLE LATE FEES	229,300	235,150	5,850	3%	270,525	254,150
	45230	ANNUAL ACCREDITED SPONSOR FEES	39,000	36,250	(2,750)	-7%	37,500	39,750
	45250	ATTENDANCE LATE FEES	120,000	120,000	-	0%	120,050	69,400
	45255	COMITY CERTIFICATES - REQUEST	13,800	13,000	(800)	-6%	13,497	12,675
	45260	COMITY CERTIFICATES - SUBMIT	16,000	17,000	1,000	6%	16,575	18,300
	47100	TRIAL ADVOCACY PROGRAM	15,000	12,000	(3,000)	-20%	12,098	-
	48010	REIMBURSEMENTS FROM SECTIONS	275,000	275,000	-	0%	275,415	363,118
	48200	SECTION DUES REVENUE	438,280	342,113	(96,168)	-22%	425,235	427,341
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	-	109,570	109,570		-	141,745
	Total Revenue		**26,416,840**	**26,822,089**	**405,248**	**2%**	**26,569,261**	**19,369,609**

	50006	ACCOMMODATION FUND	-	-	-		(0)	-
Direct	**50015**	DEPRECIATION	12,000	37,278	25,278	211%	-	-
	50020	BANK FEES	2,500	500	(2,000)	-80%	(3,210)	(2,835)
	50033	CONSULTING SERVICES	238,700	1,052,147	813,447	341%	337,934	120,812
	50034	IT EXPENSE DUE TO GF	-	1,103	1,103		-	-
	50037	MODERATE MEANS	300,000	-	(300,000)	-100%	278,889	238,011
	50050	EQUIPMENT, HARDWARE & SOFTWARE	2,400	2,635	235	10%	6,012	1,757
	50060	POSTAGE	142,000	142,900	900	1%	139,745	97,550
	50070	PRINTING & COPYING	265,500	245,000	(20,500)	-8%	211,944	142,002
	50080	PUBLICATIONS PRODUCTION	350	350	-	0%	129	-
	50085	YLL SECTION PROGRAM	1,300	1,300	-	0%	-	585
	50095	CLE COMPS	1,000	-	(1,000)	-100%	-	-
	50100	STAFF TRAVEL/PARKING	108,471	103,271	(5,200)	-5%	67,586	31,185
	50110	STAFF CONFERENCE & TRAINING	137,432	169,850	32,418	24%	86,719	59,606
	50120	STAFF MEMBERSHIP DUES	22,260	23,403	1,143	5%	16,362	14,333
	50130	SUBSCRIPTIONS	11,346	13,242	1,896	17%	9,205	6,659
	50135	TRANSCRIPTION SERVICES	-	-	-		-	-
	50140	SUPPLIES	7,200	6,365	(835)	-12%	3,007	3,402
	50145	SURVEYS	-	-	-		17,500	-
	50155	DIGITAL/ONLINE DEVELOPMENT	2,000	2,000	-	0%	572	903
	50160	TELEPHONE	94,575	93,575	(1,000)	-1%	89,645	58,632
	50165	CONFERENCE CALLS	2,207	1,830	(377)	-17%	940	283
	50185	MEETING EXPENSE	-	2,000	2,000		-	2,098
	52110	PRO BONO & PUBLIC SERVICE COMMITTEE	2,500	3,500	1,000	40%	782	323
	52121	ATJ BOARD RETREAT	6,000	6,000	-	0%	2,718	5,117
	52125	LEADERSHIP TRAINING	41,000	45,000	4,000	10%	21,847	12,352
	52140	ATJ BOARD EXPENSE	58,500	58,500	-	0%	41,683	42,520
	52210	FACILITY, PARKING, FOOD	109,500	160,485	50,985	47%	132,934	47,695
	52215	EXAMINER FEES	44,500	43,750	(750)	-2%	31,500	21,750
	52221	UBE EXAMINATIONS	118,000	46,200	(71,800)	-61%	134,108	41,448
	52225	BOARD OF BAR EXAMINERS	42,500	45,000	2,500	6%	22,040	7,511
	52230	BAR EXAM PROCTORS	23,000	10,000	(13,000)	-57%	13,737	9,432
	52235	CHARACTER & FITNESS BOARD EXP	18,000	12,000	(6,000)	-33%	2,064	5,219
	52240	DISABILITY ACCOMMODATIONS	80,000	86,500	6,500	8%	77,913	29,601
	52245	CHARACTER & FITNESS INVESTI	1,100	1,600	500	45%	(59)	700
	52246	INVESTIGATION	-	9,900	9,900		-	-
	52250	LAW SCHOOL VISITS	2,000	1,500	(500)	-25%	1,379	21
	52255	LAW CLERK BOARD	8,000	9,000	1,000	13%	5,716	2,727
	52258	LAW CLERK OUTREACH	30,000	20,000	(10,000)	-33%	5,476	-
	52270	DEPRECIATION-SOFTWARE	-	-	-		10,697	-
	52511	BAR LEADERS SUMMIT	35,000	35,000	-	0%	-	33,963
	52520	ABA DELEGATES	16,000	18,000	2,000	13%	18,649	5,360
	52521	VOLUNTEER RECOGNITION	2,000	2,000	-	0%	-	-
	52540	SECTION/COMMITTEE CHAIR MTGS	700	500	(200)	-29%	80	89
	52570	APEX	52,500	52,500	-	0%	47,315	55
	52573	50 YEAR MEMBER TRIBUTE LUNCH	35,000	38,000	3,000	9%	25,600	7,583
	52585	WASHINGTON LEADERSHIP INSTITUTE	100,000	100,000	-	0%	80,000	100,000
	52590	BAR LEADERS CONFERENCE	-	-	-		-	-
	52660	JUD RECOMMEND COMMITTEE	2,250	3,250	1,000	44%	-	1,334
	52680	DEI COUNCIL	5,900	7,600	1,700	29%	3,948	792
	52681	DIVERSITY EVENTS & PROJECTS	43,100	37,100	(6,000)	-14%	11,016	8,058
	52683	LLLT BOARD	11,500	9,000	(2,500)	-22%	1,341	2,563
	52687	INTERNAL DIVERSITY OUTREACH	7,500	6,000	(1,500)	-20%	-	-
	52688	EXAM WRITING	19,000	15,000	(4,000)	-21%	8,400	8,400
	52689	LLLT EDUCATION	1,000	1,000	-	0%	-	35
	52691	OUTREACH EXPENSES	10,000	10,000	-	0%	-	-
	52692	OUTREACH & COMMUNICATION	-	10,000	10,000		-	-
	52710	GRAPHICS/ARTWORK	1,000	1,000	-	0%	1,103	75
	52750	EDITORIAL ADVIS COMMITTEE EXP	300	300	-	0%	20	-
	52810	BOG MEETINGS	148,000	200,000	52,000	35%	164,195	89,738
	52812	NEW GOVERNOR ORIENTATION	10,000	7,000	(3,000)	-30%	2,570	177
	52820	BOG COMMITTEES' EXPENSES	2,000	5,000	3,000	150%	18	4,173
	52821	BOG RETREAT	40,000	40,000	-	0%	30,180	38,128
	52822	BOG CONFERENCE ATTENDANCE	39,500	56,500	17,000	43%	55,335	31,162
	52823	PRESIDENT'S PHOTO	3,300	3,300	-	0%	1,652	-
	52830	BOG TRAVEL & OUTREACH	50,000	45,000	(5,000)	-10%	28,413	15,111
	52840	ED TRAVEL & OUTREACH	6,000	6,000	-	0%	5,601	2,129
	52874	PUBLIC DEFENSE	4,000	4,000	-	0%	2,213	2,279
	52878	COMMUNICATIONS OUTREACH	15,000	15,000	-	0%	3,956	2,476
	52880	BOG ELECTIONS	42,000	30,000	(12,000)	-29%	12,545	14,043
	52891	LONG RANGE STRATEGIC PLANNING COUNC	-	-	-		-	-
	52940	BOARD OF TRUSTEES	3,600	3,600	-	0%	1,245	492
	52960	PRESIDENT'S DINNER	10,000	12,000	2,000	20%	11,129	0
	53210	COST OF SALES - DESKBOOKS	5,000	2,800	(2,200)	-44%	5,154	1,162
	53220	COST OF SALES - COURSEBOOKS	300	300	-	0%	69	48
	53225	COST OF SALES - SECTION PUBLIC	500	-	(500)	-100%	429	74
	53250	A/V DEVELOP COSTS (RECORDING)	-	-	-		-	-
	53260	OBSOLETE INVENTORY	48,250	118,700	70,450	146%	6,927	-
	53255	CLE-EQUIP-DEPRECIATION	2,012	-	(2,012)	-100%	2,040	1,360
	53265	SPLITS TO SECTIONS	300	-	(300)	-100%	185	-
	53270	DESKBOOK ROYALTIES	300	-	(300)	-100%	305	-
	53280	ONLINE EXPENSES	-	-	-		-	-
	53282	SOFTWARE HOSTING	68,074	91,457	23,383	34%	64,420	44,665
	53283	ON24 OVERAGE CHARGE	4,500	4,500	-	0%	6,067	4,414
	53285	ONLINE PRODUCT HOSTING EXPENSES	54,000	54,000	-	0%	49,000	26,137
	53320	POSTAGE & DELIVERY-DESKBOOKS	300	300	-	0%	-	-
	53330	POSTAGE & DELIVRY-COURSEBOOKS	200	200	-	0%	43	53
	53610	COURSEBOOK PRODUCTION	500	150	(350)	-70%	18	-
	53620	POSTAGE - FLIERS/CATALOGS	-	-	-		-	-
	53640	ACCREDITATION FEES	3,000	2,500	(500)	-17%	1,822	1,980

53660	SEMINAR BROCHURES	-	-	-		-	-
53690	FACILITIES	165,000	175,000	10,000	6%	173,104	93,757
53700	SPEAKERS & PROGRAM DEVELOP	48,100	45,800	(2,300)	-5%	36,399	6,049
53730	HONORARIUM	4,500	4,500	-	0%	-	-
53731	INSURANCE REBATE	(3,375)	-	3,375	-100%	(2,528)	-
53740	CLE SEMINAR COMMITTEE	200	200	-	0%	-	-
54026	IMAGE LIBRARY	4,800	4,800	-	0%	4,752	4,756
54027	BAR OUTREACH	20,000	15,000	(5,000)	-25%	6,082	2,408
54065	AMBASSADOR TRAINING & TOWN HALLS	-	10,000	10,000		-	-
54130	PRO BONO OUTREACH	4,000	4,000	-	0%	1,978	1,087
54310	COURT REPORTERS	100,000	110,350	10,350	10%	106,891	47,701
54320	OUTSIDE COUNSEL EXPENSES	1,000	500	(500)	-50%	250	-
54360	LITIGATION EXPENSES	41,000	31,000	(10,000)	-24%	43,229	7,950
54370	DISABILITY EXPENSES	15,000	15,000	-	0%	7,026	4,499
54391	LAW LIBRARY DESKBOOK ACCESS	10,000	10,000	-	0%	-	9,311
54400	TRANSLATION SERVICES	12,000	10,000	(2,000)	-17%	9,448	2,905
54430	PRACTICE MONITOR EXPENSES	-	-	-		-	-
54512	STAFF TRAINING- GENERAL	36,800	29,300	(7,500)	-20%	10,295	926
54520	RECRUITING AND ADVERTISING	8,000	8,750	750	9%	6,110	2,290
54530	HR INFORMATION SYSTEM	50,000	65,950	15,950	32%	47,470	35,260
54540	SALARY SURVEYS	1,000	3,000	2,000	200%	1,973	-
54590	TRANSFER TO INDIRECT EXPENSE	(111,300)	(115,700)	(4,400)	4%	(68,911)	(40,266)
54610	LIBRARY MATERIALS/RESOURCES	4,000	4,000	-	0%	250	209
54645	LEGAL TECH TASK FORCE	5,000	3,500	(1,500)	-30%	-	2,750
54715	MEMBER WELL-BEING TASK FORCE	4,250	4,500	250	6%	1,000	1,042
54810	GIFTS TO INJURED CLIENTS	500,000	500,000	-	0%	418,710	(80,480)
54820	CPF BOARD	2,000	2,000	-	0%	887	353
54910	RENT - OLYMPIA OFFICE	-	-	-		-	-
54920	CONTRACT LOBBYIST	15,000	12,500	(2,500)	-17%	12,500	15,000
54940	LEGISLATIVE COMMITTEE	1,250	1,250	-	0%	2	130
54970	BOG LEGISLATIVE COMMITTEE	300	300	-	0%	-	-
55010	LICENSING FORMS	-	-	-		-	-
55110	LPO EXAM FACILITIES	-	-	-		-	-
55130	LPO BOARD EXPENSES	4,000	4,000	-	0%	278	356
55165	LPO OUTREACH	1,000	500	(500)	-50%	-	-
55210	MCLE BOARD EXPENSES	4,000	6,000	2,000	50%	-	1,806
55220	DEPRECIATION-SOFTWARE	142,183	142,057	(126)	0%	124,381	96,096
55250	VLEX FASTCASE	85,000	87,000	2,000	2%	84,042	84,568
55265	SPEAKERS & PROGRAM DEVELOPMENT	575	500	(75)	-13%	-	-
55266	NEW LAWYER OUTREACH EVENTS	5,000	5,000	-	0%	2,029	3,519
55270	NEW LAWYERS COMMITTEE	15,000	15,000	-	0%	2,584	778
55285	OPEN SECTIONS NIGHT	-	-	-		-	-
55310	DISCIPLINARY BOARD EXPENSES	5,000	3,000	(2,000)	-40%	797	868
55320	CHIEF HEARING OFFICER	40,000	41,200	1,200	3%	39,996	26,664
55330	HEARING OFFICER EXPENSES	4,000	4,000	-	0%	874	79
55340	HEARING OFFICER TRAINING	1,000	1,000	-	0%	-	-
55370	APPOINTED COUNSEL	50,400	50,645	245	0%	49,600	33,600
55380	DISCIPLINARY SELECTION PANEL	1,000	1,000	-	0%	-	-
55419	COURT RULES COMMITTEE	1,000	1,000	-	0%	-	-
55510	PRACTICE OF LAW BOARD	16,000	16,000	-	0%	1,157	523
55555	NEW EXPENSE ACCOUNT NEEDED	-	-	-		-	-
55610	CPE COMMITTEE	1,000	1,000	-	0%	386	286
55615	WILLS	2,000	1,000	(1,000)	-50%	-	-
55620	CUSTODIANSHIP	5,000	5,000	-	0%	125	201
55970	MEMBER ENGAGEMENT COUNCIL	500	500	-	0%	-	-
55980	SMALL TOWN AND RURAL COUNCIL	7,500	7,500	-	0%	55	-
	SMALL TOWN & RURAL COUNCIL						
55981	OUTREACH & ACTIVITIES	65,000	70,000	5,000	8%	29,282	45,000
55911	CLOUD INFRASTRUCTURE	130,000	130,000	-	0%	43,143	39,237
56100	COMPUTER HARDWARE	66,200	65,000	(1,200)	-2%	64,018	60,179
56150	COMPUTER SOFTWARE	530,000	518,000	(12,000)	-2%	268,912	295,950
56225	HARDWARE SERVICE & WARRANTIES	50,000	50,000	-	0%	30,498	34,392
56230	SOFTWARE MAINT & LICENSING	400,000	470,000	70,000	18%	338,290	340,918
56500	COMPUTER SUPPLIES	-	-	-		-	-
56550	THIRD PARTY SERVICES	65,000	177,600	112,600	173%	38,658	48,763
56900	TRANSFER TO INDIRECT EXPENSES	(1,478,500)	(2,527,807)	(1,049,307)	71%	(1,141,736)	(979,297)
57320	TRIAL ADVOCACY EXPENSES	2,025	3,200	1,175	58%	1,254	-
57450	REGULATORY SCHOOL	12,000	10,000	(2,000)	-17%	-	7,767
57460	LAW SCHOOL OUTREACH	500	500	-	0%	-	-
58125	ANNUAL OR OTHER MEETING EXPENS	22,700	23,200	500	2%	15,141	7,792
58150	ATTENDANCE AT BOG MEETINGS	2,200	2,604	404	18%	0	754

	58175	AWARDS	5,810	6,810	1,000	17%	667	166
	58200	BREAKFAST/LUNCH/DINNER MTG EXP	4,000	1,500	(2,500)	-63%	82	-
	58225	CONFERENCE/INSTITUTE EXPENSE	30,000	-	(30,000)	-100%	(135)	22,916
	58300	EXECUTIVE COMMITTEE EXPENSES	70,270	60,645	(9,625)	-14%	21,744	22,920
	58305	EXECUTIVE COMM EXP - OTHER	58,500	74,000	15,500	26%	50,027	28,329
	58315	HONORARIUM	9,100	7,000	(2,100)	-23%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	89,910	110,360	20,450	23%	53,779	50,840
	58326	LEGISLATIVE/LOBBYING	2,000	2,500	500	25%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	38,570	44,220	5,650	15%	11,394	2,587
	58375	NEWSLETTER/PUBLICATION EXPENSE	14,950	20,000	5,050	34%	7,388	4,044
	58400	PER MEMBER CHARGE	280,433	210,881	(69,552)	-25%	275,378	271,326
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	-	70,108	70,108		-	91,793
	58450	RECEPTION/FORUM EXPENSE	62,510	65,010	2,500	4%	21,592	19,200
	58500	NEW LAWYER OUTREACH	5,220	5,220	-	0%	120	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	220,200	200,100	(20,100)	-9%	80,096	81,557
	58550	SECTION COMMITTEE EXPENSE	2,000	1,000	(1,000)	-50%	-	771
	58600	SECTION SPECIAL PROJECTS	8,020	9,550	1,530	19%	-	-
	58615	LAW SCHOOL OUTREACH	27,510	27,510	-	0%	7,629	4,088
	58620	MINI-CLE EXPENSE	50,516	45,075	(5,441)	-11%	18,894	3,600
	58625	SEMINAR EXPENSE - SECTIONS	76,000	84,500	8,500	11%	28,989	6,714
	58675	WEBSITE EXPENSES	10,380	11,880	1,500	14%	4,822	3,126
	58680	ELECTIONS	-	-	-		-	-
	58750	SEMINAR SCHOLARSHIPS	8,000	6,500	(1,500)	-19%	3,676	1,340
		Total Direct Expenses	**5,109,934**	**4,911,309**	**(198,625)**	**-4%**	**3,817,336**	**2,333,261**
					-			
Indirect	**51110**	SALARIES	14,691,362	14,130,725	(560,637)	-4%	13,290,031	9,364,388
	51120	BUDGETED TEMPORARY EMPLOYEES	261,668	212,850	(48,818)	-19%	302,485	206,870
	51121	UNANTICIPATED TEMPS	-	-	-		813	11,970
	51122	STAFF REPLACEMENT TEMPS					208,046	116,078
	51126	EMPLOYEE PLACEMENT FEES					900	24,773
	51130	VACATION & COMP TIME ACCRUALS					19,858	118,060
	51199	SALARY EXPENSE			-		-	-
	51210	EMPLOYEE ASSISTANCE PLAN	4,800	4,800	(0)	0%	4,800	3,600
	51220	EMPLOYEE SERVICE AWARDS	2,610	2,260	(350)	-13%	1,480	1,730
	51230	FICA (EMPLOYER PORTION)	1,112,598	1,067,890	(44,709)	-4%	1,003,129	710,984
	51240	L&I INSURANCE	72,487	65,406	(7,080)	-10%	59,309	29,544
	51245	WA STATE FAMILY MEDICAL LEAVE (ER POR	33,236	38,961	5,726	17%	28,506	23,011
	51250	MEDICAL (EMPLOYER PORTION)	2,057,482	1,959,293	(98,189)	-5%	1,880,001	1,372,320
	51270	RETIREMENT (EMPLOYER PORTION)	1,322,122	778,534	(543,588)	-41%	1,242,168	845,212
	51280	TRANSPORTATION ALLOWANCE	34,000	25,944	(8,056)	-24%	28,799	24,222
	51290	UNEMPLOYMENT INSURANCE	71,847	73,419	1,572	2%	67,559	48,243
	51299	BENEFITS EXPENSE			-		-	-
	51310	WORKPLACE BENEFITS	56,400	60,150	3,750	7%	58,052	11,774
	51340	HUMAN RESOURCES POOLED EXP	111,300	115,700	4,400	4%	68,911	40,266
	51405	MEETING SUPPORT EXPENSES	9,950	9,950	-	0%	7,592	6,302
	51409	RENT EXPENSE	-	-			1,302,980	598,595
	51410	RENT	960,000	923,055	(36,945)	-4%	415,523	83,520
	51411	MOVE/DOWNSIZING EXPENSES	28,208	-	(28,208)	-100%	36,887	24,906
	51413	RENT - CONFERENCE CENTER	-	-			(33,800)	(19,100)
	51420	PERSONAL PROP TAXES-WSBA	8,400	6,500	(1,900)	-23%	6,195	4,716
	51430	FURNITURE, MAINT, LH IMP	75,617	48,450	(27,167)	-36%	32,987	40,629
	51435	SAFETY & SECURITY	-	10,420	10,420		-	-
	51440	OFFICE SUPPLIES & EQUIP	22,164	19,635	(2,529)	-11%	16,455	11,093
	51450	FURN, LH IMP, & OFFICE EQUIP DEPREC	159,628	224,084	64,456	40%	115,775	76,202
	51470	COMPUTER HARDWARE DEPREC	42,000	47,971	5,971	14%	39,315	25,700
	51480	COMPUTER SOFTWARE DEPREC	49,339	36,319	(13,020)	-26%	69,220	32,523
	51500	INSURANCE	288,200	273,491	(14,709)	-5%	265,583	173,680
	51501	WORK HOME FURNITURE & EQUIP	14,000	10,500	(3,500)	-25%	3,996	1,541
	51505	PROFESSIONAL FEES-AUDIT	41,000	43,500	2,500	6%	38,400	36,577
	51510	PROFESSIONAL FEES- LEGAL	200,000	250,000	50,000	25%	101,591	106,115
	51512	ONLINE LEGAL RESEARCH	86,000	89,000	3,000	3%	26,439	58,316
	51513	ACCOMODATIONS FUND	6,500	6,500	0	0%	-	-
	51514	TRANSLATION SERVICES	12,000	25,000	13,000	108%	6,814	4,163
	51515	TELEPHONE & INTERNET	33,600	33,600	0	0%	32,390	21,880
	51520	POSTAGE - GENERAL	15,500	12,000	(3,500)	-23%	8,796	4,629
	51525	RECORDS MANAGEMENT	28,849	7,500	(21,349)	-74%	62,062	23,060
	51530	BANK FEES (INDIRECT)	30,000	27,000	(3,000)	-10%	23,638	8,181
	51620	PRODUCTION MAINT & SUPPLIES	13,000	13,250	250	2%	8,976	8,012
	51710	COMPUTER POOLED EXPENSES	1,478,500	2,527,807	1,049,307	71%	1,141,736	979,297
	51810	GAIN (LOSS) ON ASSETS	-	-			10,667	1,396
	51925	ALLOWANCE FOR OPEN POSITIONS	(200,000)	(200,000)	-	0%	-	-
	51955	CAPITAL LABOR & OVERHEAD	(75,000)	-	75,000	-100%	(75,555)	(93,204)
	51900	OTHER INDIRECT EXPENSE			-		-	-
	51935	INSURANCE REBATE	(19,016)	-	19,016	-100%	(20,950)	-
		TOTAL INDIRECT EXPENSES:	**23,140,350**	**22,981,465**	**(158,886)**	**-1%**	**21,908,556**	**15,171,774**
		TOTAL ALL EXPENSES:	**28,250,284**	**27,892,774**	**(357,510)**	**-1%**	**25,725,892**	**17,505,034**
		NET INCOME (LOSS):	**(1,833,444)**	**(1,070,685)**	**762,759**	**-42%**	**843,370**	**1,864,574**

Washington State Bar Association
Budget Comparison

INDIRECT EXPENSES

Cost Center **FY26 FTE** **141.50**
All **FY25 REFORECAST FTE** **147.50**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
INDIRECT	**51110**	SALARIES	14,691,362	14,130,725	(560,637)	-4%	13,290,031	9,364,388
	51120	BUDGETED TEMPORARY EMPLOYEES	261,668	212,850	(48,818)	-19%	302,485	206,870
	51121	UNANTICIPATED TEMPS	-	-	-		813	11,970
	51122	STAFF REPLACEMENT TEMPS	-	-			208,046	116,078
	51126	EMPLOYEE PLACEMENT FEES	-	-			900	24,773
	51130	VACATION & COMP TIME ACCRUALS	-	-			19,858	118,060
	51925	ALLOWANCE FOR OPEN POSITIONS	(200,000)	(200,000)	-	0%	-	-
	51935	INSURANCE REBATE	(19,016)	-	19,016	-100%	(20,950)	-
	51955	CAPITAL LABOR & OVERHEAD	(75,000)	-	75,000	-100%	(75,555)	(93,204)
	51199	**SALARY EXPENSE**	**14,659,014**	**14,143,575**	**(515,439)**	**-4%**	**13,725,627**	**9,748,935**
	51210	EMPLOYEE ASSISTANCE PLAN	4,800	4,800	(0)	0%	4,800	3,600
	51220	EMPLOYEE SERVICE AWARDS	2,610	2,260	(350)	-13%	1,480	1,730
	51230	FICA (EMPLOYER PORTION)	1,112,598	1,067,890	(44,709)	-4%	1,003,129	710,984
	51240	L&I INSURANCE	72,487	65,406	(7,080)	-10%	59,309	29,544
	51245	WA STATE FAMILY MEDICAL LEAVE (ER PORTION)	33,236	38,961	5,726	17%	28,506	23,011
	51250	MEDICAL (EMPLOYER PORTION)	2,057,482	1,959,293	(98,189)	-5%	1,880,001	1,372,320
	51270	RETIREMENT (EMPLOYER PORTION)	1,322,122	778,534	(543,588)	-41%	1,242,168	845,212
	51280	TRANSPORTATION ALLOWANCE	34,000	25,944	(8,056)	-24%	28,799	24,222
	51290	UNEMPLOYMENT INSURANCE	71,847	73,419	1,572	2%	67,559	48,243
	51299	**BENEFITS EXPENSE**	**4,711,182**	**4,016,507**	**(694,674)**	**-15%**	**4,315,751**	**3,058,865**
	51310	WORKPLACE BENEFITS	56,400	60,150	3,750	7%	58,052	11,774
	51340	HUMAN RESOURCES POOLED EXP	111,300	115,700	4,400	4%	68,911	40,266
	51405	MEETING SUPPORT EXPENSES	9,950	9,950	(0)	0%	7,592	6,302
	51409	RENT EXPENSE	-	-			1,302,980	598,595
	51410	RENT	960,000	923,055	(36,945)	-4%	415,523	83,520
	51411	MOVE/DOWNSIZING EXPENSES	28,208	-	(28,208)	-100%	36,887	24,906
	51413	RENT - CONFERENCE CENTER	-	-			(33,800)	(19,100)
	51420	PERSONAL PROP TAXES-WSBA	8,400	6,500	(1,900)	-23%	6,195	4,716
	51430	FURNITURE, MAINT, LH IMP	75,617	48,450	(27,167)	-36%	32,987	40,629
	51435	SAFETY & SECURITY	-	10,420	10,420		-	-
	51440	OFFICE SUPPLIES & EQUIP	22,164	19,635	(2,529)	-11%	16,455	11,093
	51450	FURN, LH IMP, & OFFICE EQUIP DEPREC	159,628	224,084	64,456	40%	115,775	76,202
	51470	COMPUTER HARDWARE DEPREC	42,000	47,971	5,971	14%	39,315	25,700
	51480	COMPUTER SOFTWARE DEPREC	49,339	36,319	(13,020)	-26%	69,220	32,523
	51500	INSURANCE	288,200	273,491	(14,709)	-5%	265,583	173,680
	51501	WORK HOME FURNITURE & EQUIP	14,000	10,500	(3,500)	-25%	3,996	1,541
	51505	PROFESSIONAL FEES-AUDIT	41,000	43,500	2,500	6%	38,400	36,577
	51510	PROFESSIONAL FEES- LEGAL	200,000	250,000	50,000	25%	101,591	106,115
	51512	ONLINE LEGAL RESEARCH	86,000	89,000	3,000	3%	26,439	58,316
	51513	ACCOMODATIONS FUND	6,500	6,500	-	0%	-	-
	51514	TRANSLATION SERVICES	12,000	25,000	13,000	108%	6,814	4,163
	51515	TELEPHONE & INTERNET	33,600	33,600	-	0%	32,390	21,880
	51520	POSTAGE - GENERAL	15,500	12,000	(3,500)	-23%	8,796	4,629
	51525	RECORDS MANAGEMENT	28,849	7,500	(21,349)	-74%	62,062	23,060
	51530	BANK FEES (INDIRECT)	30,000	27,000	(3,000)	-10%	23,638	8,181
	51620	PRODUCTION MAINT & SUPPLIES	13,000	13,250	250	2%	8,976	8,012
	51710	COMPUTER POOLED EXPENSES	1,478,500	2,527,807	1,049,307	71%	1,141,736	979,297
	51810	GAIN (LOSS) ON ASSETS	-	-	-		10,667	1,396
	51900	**OTHER INDIRECT EXPENSE**	**3,770,155**	**4,821,383**	**1,051,228**	28%	**3,867,178**	**2,363,974**
		TOTAL INDIRECT EXPENSES:	**23,140,350**	**22,981,465**	**(158,886)**	**-1%**	**21,908,556**	**15,171,774**

Washington State Bar Association
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ACCESS TO JUSTICE

Cost Center	**FY26 FTE**	**1.64**
ATJ	**FY25 REFORECAST FTE**	**1.63**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	2,800	2,800	-	0%	1,588	1,342
	50110	STAFF CONFERENCE & TRAINING	2,495	4,400	1,905	76%	912	1,530
	52121	ATJ BOARD RETREAT	6,000	6,000	-	0%	2,718	5,117
	52125	LEADERSHIP TRAINING	6,000	10,000	4,000	67%	4,150	7,230
	52140	ATJ BOARD EXPENSE	58,500	58,500	-	0%	41,683	42,520
	52874	PUBLIC DEFENSE	4,000	4,000	-	0%	2,213	2,279
	58225	CONFERENCE/INSTITUTE EXPENSE	30,000	-	(30,000)	-100%	(135)	22,916
	58450	RECEPTION/FORUM EXPENSE	30,000	30,000	-	0%	9,497	17,314
	TOTAL DIRECT EXPENSES		**139,795**	**115,700**	**(24,095)**	**-17%**	**62,625**	**100,248**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	155,733	161,099	5,366	3%	138,676	105,928
	51299	BENEFITS EXPENSE	51,565	46,452	(5,113)	-10%	48,134	34,098
	51900	OTHER INDIRECT EXPENSE	42,302	56,473	14,171	33%	43,699	26,765
	TOTAL INDIRECT EXPENSES:		**249,600**	**264,024**	**14,424**	**6%**	**230,509**	**166,792**
TOTAL ALL EXPENSES:			**389,395**	**379,724**	**(9,671)**	**-2%**	**293,135**	**267,041**
NET INCOME (LOSS):			**(389,395)**	**(379,724)**	**9,671**	**-2%**	**(293,135)**	**(267,041)**

Washington State Bar Association
Budget Comparison

ADMISSIONS

Cost Center **FY26 FTE** **6.65**
ADMISS **FY25 REFORECAST FTE** **6.17**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40705	EXAM SOFTWARE REVENUE	27,500	9,500	(18,000)	-65%	30,615	8,150
	42207	BAR EXAM FEES	1,280,780	1,300,000	19,220	2%	1,176,215	1,345,085
	42230	BAR EXAM LATE FEES	98,200	95,000	(3,200)	-3%	56,700	67,200
	42232	HOUSE COUNSEL APPLICATION FEES	56,260	55,000	(1,260)	-2%	33,080	28,360
	42270	RULE 9/LEGAL INTERN FEES	12,500	13,000	500	4%	16,950	11,950
	42285	FOREIGN LAW CONSULTANT FEES	1,940	1,940	-	0%	3,100	970
	42287	SPECIAL ADMISSIONS	3,000	5,000	2,000	67%	6,435	6,590
	TOTAL REVENUE		**1,480,180**	**1,479,440**	**(740)**	**0%**	**1,323,095**	**1,468,305**
DIRECT EXPENSES:								
	50060	POSTAGE	2,000	2,900	900	45%	1,993	2,236
	50100	STAFF TRAVEL/PARKING	24,000	24,000	-	0%	20,487	8,264
	50110	STAFF CONFERENCE & TRAINING	10,100	11,000	900	9%	6,348	7,040
	50120	STAFF MEMBERSHIP DUES	495	495	-	0%	555	245
	50140	SUPPLIES	4,000	2,500	(1,500)	-38%	1,824	3,110
	52210	FACILITY, PARKING, FOOD	100,000	150,985	50,985	51%	125,601	43,083
	52215	EXAMINER FEES	44,500	43,750	(750)	-2%	31,500	21,750
	52221	UBE EXAMINATIONS	118,000	46,200	(71,800)	-61%	134,108	41,448
	52225	BOARD OF BAR EXAMINERS	42,500	45,000	2,500	6%	22,040	7,511
	52230	BAR EXAM PROCTORS	23,000	10,000	(13,000)	-57%	13,737	9,432
	52240	DISABILITY ACCOMMODATIONS	65,000	75,000	10,000	15%	73,578	28,934
	52245	CHARACTER & FITNESS INVESTI	1,000	1,500	500	50%	(59)	700
	52250	LAW SCHOOL VISITS	2,000	1,500	(500)	-25%	1,379	21
	53282	SOFTWARE HOSTING	45,609	45,000	(609)	-1%	43,806	29,928
	52270	DEPRECIATION-SOFTWARE	-	-	-		10,697	-
	TOTAL DIRECT EXPENSES		**482,204**	**459,830**	**(22,374)**	**-5%**	**487,593**	**203,702**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	531,757	580,575	48,818	9%	541,081	374,281
	51299	BENEFITS EXPENSE	187,665	178,629	(9,035)	-5%	170,209	126,845
	51900	OTHER INDIRECT EXPENSE	163,842	228,991	65,149	40%	180,597	105,735
	TOTAL INDIRECT EXPENSES:		**883,264**	**988,195**	**104,931**	**12%**	**891,887**	**606,862**
	TOTAL ALL EXPENSES:		**1,365,468**	**1,448,025**	**82,557**	**6%**	**1,379,480**	**810,564**
	NET INCOME (LOSS):		**114,712**	**31,415**	**(83,297)**	**-73%**	**(56,385)**	**657,741**

Washington State Bar Association
Budget Comparison

ADVANCEMENT FTE

Cost Center	**FY26 FTE**	**1.41**
ADV FTE	**FY25 REFORECAST FTE**	**1.96**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50110	STAFF CONFERENCE & TRAINING	3,300	6,600	3,300	100%	8,846	120
	TOTAL DIRECT EXPENSES		**3,300**	**6,600**	**3,300**	**100%**	**8,846**	**120**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	264,525	216,525	(48,000)	-18%	246,488	174,091
	51299	BENEFITS EXPENSE	74,703	50,531	(24,172)	-32%	68,782	48,669
	51900	OTHER INDIRECT EXPENSE	50,098	48,553	(1,545)	-3%	50,660	31,441
	TOTAL INDIRECT EXPENSES:		**389,327**	**315,609**	**(73,718)**	**-19%**	**365,930**	**254,201**
	TOTAL ALL EXPENSES:		**392,627**	**322,209**	**(70,418)**	**-18%**	**374,776**	**254,321**
	NET INCOME (LOSS):		**(392,627)**	**(322,209)**	**70,418**	**-18%**	**(374,776)**	**(254,321)**

Washington State Bar Association
Budget Comparison

BAR NEWS

Cost Center **FY26 FTE** **2.13**
BN **FY25 REFORECAST FTE** **2.13**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40900	ROYALTIES	2,000	2,000	-	0%	1,543	-
	42710	BNEWS DISPLAY ADVERTISING	405,000	405,000	-	0%	418,264	305,679
	42720	BNEWS SUBSCRIPT/SINGLE ISSUES	100	100	-	0%	108	108
	42730	BNEWS CLASSIFIED ADVERTISING	2,500	2,500	-	0%	2,761	2,872
	42760	JOB TARGET ADVERSTISING	180,000	120,000	(60,000)	-33%	152,139	63,116
	TOTAL REVENUE		**589,600**	**529,600**	**(60,000)**	**-10%**	**574,814**	**371,775**
DIRECT EXPENSES:								
	50060	POSTAGE	135,000	135,000	-	0%	122,543	91,121
	50070	PRINTING & COPYING	262,500	242,000	(20,500)	-8%	211,369	140,525
	50110	STAFF CONFERENCE & TRAINING	-	2,200	2,200		-	-
	50120	STAFF MEMBERSHIP DUES	150	220	70	47%	135	-
	50130	SUBSCRIPTIONS	225	225	-	0%	203	204
	50155	DIGITAL/ONLINE DEVELOPMENT	2,000	2,000	-	0%	572	903
	52710	GRAPHICS/ARTWORK	1,000	1,000	-	0%	1,103	75
	52750	EDITORIAL ADVIS COMMITTEE EXP	300	300	-	0%	20	-
	TOTAL DIRECT EXPENSES		**401,175**	**382,945**	**(18,230)**	**-5%**	**335,944**	**232,829**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	207,867	199,151	(8,716)	-4%	213,708	137,363
	51299	BENEFITS EXPENSE	67,753	59,029	(8,724)	-13%	70,936	42,804
	51900	OTHER INDIRECT EXPENSE	54,444	73,346	18,902	35%	59,554	34,041
	TOTAL INDIRECT EXPENSES:		**330,063**	**331,526**	**1,463**	**0%**	**344,199**	**214,209**
	TOTAL ALL EXPENSES:		**731,238**	**714,471**	**(16,767)**	**-2%**	**680,143**	**447,038**
	NET INCOME (LOSS):		**(141,638)**	**(184,871)**	**(43,233)**	**31%**	**(105,328)**	**(75,262)**

Washington State Bar Association
Budget Comparison

BOARD OF GOVERNORS

Cost Center	**FY26 FTE**	**1.73**
BOG	**FY25 REFORECAST FTE**	**1.40**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-	-	-	-
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	-	-	-		(0)	-
	50140	SUPPLIES	500	765	265	53%	610	84
	52125	LEADERSHIP TRAINING	15,000	15,000	-	0%	1,681	-
	52810	BOG MEETINGS	148,000	200,000	52,000	35%	164,195	89,738
	52820	BOG COMMITTEES' EXPENSES	2,000	5,000	3,000	150%	18	4,173
	52821	BOG RETREAT	40,000	40,000	-	0%	30,180	38,128
	52822	BOG CONFERENCE ATTENDANCE	39,500	56,500	17,000	43%	55,335	31,162
	52830	BOG TRAVEL & OUTREACH	50,000	45,000	(5,000)	-10%	28,413	15,111
	52880	BOG ELECTIONS	42,000	30,000	(12,000)	-29%	12,545	14,043
	52960	PRESIDENT'S DINNER	10,000	12,000	2,000	20%	11,129	0
	52812	NEW GOVERNOR ORIENTATION	10,000	7,000	(3,000)	-30%	2,570	177
	52823	PRESIDENTS PHOTO	3,300	3,300	-	0%	1,652	-
	TOTAL DIRECT EXPENSES		**360,300**	**414,565**	**54,265**	**15%**	**308,326**	**192,617**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	112,836	135,043	22,207	20%	103,300	85,994
	51299	BENEFITS EXPENSE	40,463	44,269	3,807	9%	30,140	31,180
	51900	OTHER INDIRECT EXPENSE	35,785	59,572	23,788	66%	40,219	27,673
TOTAL INDIRECT EXPENSES:			**189,084**	**238,885**	**49,801**	**26%**	**173,659**	**144,848**
TOTAL ALL EXPENSES:			**549,384**	**653,450**	**104,066**	**19%**	**481,985**	**337,465**
NET INCOME (LOSS):			**(549,384)**	**(653,450)**	**(104,066)**	**19%**	**(481,985)**	**(337,465)**

Washington State Bar Association
Budget Comparison

CONFERENCE AND BROADCAST SERVICES

Cost Center **FY26 FTE** **0.55**
CBS **FY25 REFORECAST FTE** **0.00**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	TOTAL DIRECT EXPENSES		-	-	-		-	-
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	-	49,269	49,269		-	-
	51299	BENEFITS EXPENSE	-	14,930	14,930		-	-
	51900	OTHER INDIRECT EXPENSE	-	18,939	18,939		-	-
	TOTAL INDIRECT EXPENSES:		**-**	**83,138**	**83,138**		**-**	**-**
	TOTAL ALL EXPENSES:		**-**	**83,138**	**83,138**		**-**	**-**
	NET INCOME (LOSS):		**-**	**(83,138)**	**(83,138)**		**-**	**-**

CHARACTER & FITNESS BOARD

Cost Center	**FY26 FTE**	**0.85**
CFB	**FY25 REFORECAST FTE**	**0.75**

Washington State Bar Association
Budget Comparison

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	52235	CHARACTER & FITNESS BOARD EXP	18,000	12,000	(6,000)	-33%	2,064	5,219
	54310	COURT REPORTERS	15,000	11,050	(3,950)	-26%	687	4,748
	TOTAL DIRECT EXPENSES		**33,000**	**23,050**	**(9,950)**	**-30%**	**2,750**	**9,966**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	95,315	103,891	8,576	9%	95,864	64,139
	51299	BENEFITS EXPENSE	27,582	26,820	(762)	-3%	28,077	18,230
	51900	OTHER INDIRECT EXPENSE	19,170	29,270	10,099	53%	20,109	12,056
	TOTAL INDIRECT EXPENSES:		**142,068**	**159,981**	**17,913**	**13%**	**144,050**	**94,425**
	TOTAL ALL EXPENSES:		**175,068**	**183,031**	**7,963**	**5%**	**146,800**	**104,391**
	NET INCOME (LOSS):		**(175,068)**	**(183,031)**	**(7,963)**	**5%**	**(146,800)**	**(104,391)**

COMMUNICATION STRATEGIES

Cost Center		
COMM	FY26 FTE	5.39
	FY25 REFORECAST FTE	6.05

Washington State Bar Association
Budget Comparison

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	42570	50 YEAR MEMBER TRIBUTE LUNCH	100	1,000	900	900%	1,900	380
	44100	WSBA LOGO MERCHANDISE SALES	500	2,000	1,500	300%	2,414	1,462
	TOTAL REVENUE		**600**	**3,000**	**2,400**	**400%**	**4,314**	**1,842**
DIRECT EXPENSES:								
	50050	EQUIPMENT, HARDWARE & SOFTWARE	-	-	-		1	-
	50100	STAFF TRAVEL/PARKING	5,895	5,895	-	0%	3,213	1,507
	50110	STAFF CONFERENCE & TRAINING	11,100	11,300	200	2%	9,199	8,761
	50120	STAFF MEMBERSHIP DUES	1,800	1,800	-	0%	1,164	327
	50130	SUBSCRIPTIONS	4,000	4,520	520	13%	2,237	1,438
	52511	BAR LEADERS SUMMIT	35,000	35,000	-	0%	-	33,963
	52570	APEX	52,500	52,500	-	0%	47,315	55
	52573	50 YEAR MEMBER TRIBUTE LUNCH	35,000	38,000	3,000	9%	25,600	7,583
	52878	COMMUNICATIONS OUTREACH	15,000	15,000	-	0%	3,956	2,476
	54027	BAR OUTREACH	20,000	15,000	(5,000)	-25%	6,082	2,408
	54065	AMBASSADOR TRAINING & TOWN HALLS	-	10,000	10,000		-	-
	TOTAL DIRECT EXPENSES		**180,295**	**189,015**	**8,720**	**5%**	**98,767**	**58,518**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	465,232	417,995	(47,237)	-10%	344,958	251,881
	51299	BENEFITS EXPENSE	170,889	137,502	(33,387)	-20%	118,866	95,029
	51900	OTHER INDIRECT EXPENSE	154,640	185,603	30,963	20%	139,218	86,381
TOTAL INDIRECT EXPENSES:			**790,762**	**741,101**	**(49,661)**	**-6%**	**603,042**	**433,291**
TOTAL ALL EXPENSES:			**971,057**	**930,116**	**(40,941)**	**-4%**	**701,809**	**491,808**
NET INCOME (LOSS):			**(970,457)**	**(927,116)**	**43,341**	**-4%**	**(697,495)**	**(489,966)**

COMMUNICATION STRATEGIES FTE

Cost Center	**FY26 FTE**	**1.00**
COMM FTE	**FY25 REFORECAST FTE**	**1.00**

Washington State Bar Association
Budget Comparison

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	TOTAL DIRECT EXPENSES		**-**	**-**	**-**		**-**	**-**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	179,737	183,193	3,456	2%	171,493	124,414
	51299	BENEFITS EXPENSE	45,265	39,830	(5,435)	-12%	47,337	31,281
	51900	OTHER INDIRECT EXPENSE	25,560	34,435	8,874	35%	26,684	16,075
	TOTAL INDIRECT EXPENSES:		**250,562**	**257,458**	**6,896**	**3%**	**245,513**	**171,770**
	NET INCOME (LOSS):		**(250,562)**	**(257,458)**	**(6,896)**	**3%**	**(245,513)**	**(171,770)**

Washington State Bar Association
Budget Comparison

DISCIPLINE

Cost Center **FY26 FTE** **39.00**
DISC **FY25 REFORECAST FTE** **38.90**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	42450	AUDIT REVENUE	1,000	1,000	-	0%	170	468
	44350	RECOVERY OF DISCIPLINE COSTS	70,000	65,000	(5,000)	-7%	54,568	35,681
	44450	DISCIPLINE HISTORY SUMMARY	19,000	19,000	-	0%	18,510	14,340
	TOTAL REVENUE		**90,000**	**85,000**	**(5,000)**	**-6%**	**73,248**	**50,489**
DIRECT EXPENSES:								
	50080	PUBLICATIONS PRODUCTION	350	350	-	0%	129	-
	50100	STAFF TRAVEL/PARKING	25,000	15,000	(10,000)	-40%	13,800	6,816
	50110	STAFF CONFERENCE & TRAINING	37,345	37,800	455	1%	28,498	19,731
	50120	STAFF MEMBERSHIP DUES	7,090	7,659	569	8%	6,418	6,840
	50160	TELEPHONE	4,000	3,000	(1,000)	-25%	2,740	1,509
	54310	COURT REPORTERS	60,000	66,200	6,200	10%	61,666	25,861
	54320	OUTSIDE COUNSEL EXPENSES	1,000	500	(500)	-50%	250	-
	54360	LITIGATION EXPENSES	40,000	30,000	(10,000)	-25%	43,226	7,802
	54370	DISABILITY EXPENSES	15,000	15,000	-	0%	7,026	4,499
	54400	TRANSLATION SERVICES	12,000	10,000	(2,000)	-17%	9,448	2,905
	TOTAL DIRECT EXPENSES		**201,785**	**185,509**	**(16,276)**	**-8%**	**173,200**	**75,963**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	4,053,832	4,131,360	77,528	2%	3,734,909	2,628,417
	51299	BENEFITS EXPENSE	1,272,455	1,139,859	(132,595)	-10%	1,115,581	821,766
	51900	OTHER INDIRECT EXPENSE	995,577	1,342,955	347,379	35%	1,015,908	624,606
	TOTAL INDIRECT EXPENSES:		**6,321,864**	**6,614,175**	**292,311**	**5%**	**5,866,398**	**4,074,788**
	TOTAL ALL EXPENSES:		**6,523,649**	**6,799,684**	**276,035**	**4%**	**6,039,598**	**4,150,752**
	NET INCOME (LOSS):		**(6,433,649)**	**(6,714,684)**	**(281,035)**	**4%**	**(5,966,350)**	**(4,100,263)**

Washington State Bar Association
Budget Comparison

DIVERSITY

Cost Center **FY26 FTE** **2.69**
DIV **FY25 REFORECAST FTE** **2.69**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40300	DONATIONS & GRANTS	135,000	135,000	-	0%	135,000	135,000
	TOTAL REVENUE		**135,000**	**135,000**	**-**	**0%**	**135,000**	**135,000**
DIRECT EXPENSES:								
	50033	CONSULTING SERVICES	7,000	3,000	(4,000)	-57%	58,775	45
	50100	STAFF TRAVEL/PARKING	3,700	3,700	-	0%	874	454
	50110	STAFF CONFERENCE & TRAINING	3,000	4,400	1,400	47%	2,154	162
	50120	STAFF MEMBERSHIP DUES	700	775	75	11%	90	655
	50145	SURVEYS	-	-	-		17,500	-
	52680	DEI COUNCIL	5,900	7,600	1,700	29%	3,948	792
	52681	DIVERSITY EVENTS & PROJECTS	43,100	37,100	(6,000)	-14%	11,016	8,058
	52687	INTERNAL DIVERSITY OUTREACH	7,500	6,000	(1,500)	-20%	-	-
	TOTAL DIRECT EXPENSES		**70,900**	**62,575**	**(8,325)**	**-12%**	**94,356**	**10,166**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	227,749	234,855	7,106	3%	149,846	147,634
	51299	BENEFITS EXPENSE	79,569	72,236	(7,333)	-9%	46,796	50,973
	51900	OTHER INDIRECT EXPENSE	68,757	92,629	23,872	35%	71,929	43,024
	TOTAL INDIRECT EXPENSES:		**376,075**	**399,721**	**23,645**	**6%**	**268,572**	**241,632**
	TOTAL ALL EXPENSES:		**446,975**	**462,296**	**15,320**	**3%**	**362,928**	**251,797**
	NET INCOME (LOSS):		**(311,975)**	**(327,296)**	**(15,320)**	**5%**	**(227,928)**	**(116,798)**

Washington State Bar Association
Budget Comparison

ENTITY REGULATION

				FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
Cost Center	**FY26 FTE**	**1.15**							
ER	**FY25 REFORECAST FTE**	**0.00**							
REVENUE:									
	42233	APPLICATION FEES		-	28,000	28,000		-	-
	42234	ANNUAL FEES		-	47,500	47,500		-	-
	TOTAL REVENUE			**-**	**75,500**	**75,500**		**-**	**-**
	50110	STAFF CONFERENCE & TRAINING		-	4,400	4,400		-	-
	52246	INVESTIGATION		-	9,600	9,600		-	-
	52692	OUTREACH & COMMUNICATION		-	10,000	10,000		-	-
	53282	SOFTWARE HOSTING		-	3,973	3,973		-	-
	TOTAL DIRECT EXPENSES			**-**	**27,973**	**27,973**		**-**	**-**
INDIRECT EXPENSES:									
	51199	SALARY EXPENSE		-	96,849	96,849		-	-
	51299	BENEFITS EXPENSE		-	30,357	30,357		-	-
	51900	OTHER INDIRECT EXPENSE		-	39,600	39,600		-	-
	TOTAL INDIRECT EXPENSES:			**-**	**166,806**	**166,806**		**-**	**-**
	TOTAL ALL EXPENSES:			**-**	**194,778**	**194,778**		**-**	**-**
	NET INCOME (LOSS):			**-**	**(119,278)**	**(119,278)**		**-**	**-**

Washington State Bar Association
Budget Comparison

FACILITIES AND OPERATIONS

Cost Center	**FY26 FTE**	**5.78**
FAC	**FY25 REFORECAST FTE**	**5.78**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	2,376	2,376	-	0%	2,376	1,507
	50110	STAFF CONFERENCE & TRAINING	677	-	(677)	-100%	10	-
	50120	STAFF MEMBERSHIP DUES	-	189	189		-	-
	TOTAL DIRECT EXPENSES		**3,053**	**2,565**	**(488)**	**-16%**	**2,386**	**1,507**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	427,125	406,195	(20,930)	-5%	403,747	288,610
	51299	BENEFITS EXPENSE	160,271	141,474	(18,797)	-12%	156,116	104,583
	51900	OTHER INDIRECT EXPENSE	147,739	199,033	51,294	35%	154,687	92,843
	TOTAL INDIRECT EXPENSES:		**735,135**	**746,702**	**11,567**	**2%**	**714,551**	**486,036**
	TOTAL ALL EXPENSES:		**738,188**	**749,267**	**11,079**	**2%**	**716,937**	**487,543**
	NET INCOME (LOSS):		**(738,188)**	**(749,267)**	**(11,079)**	**2%**	**(716,937)**	**(487,543)**

Washington State Bar Association
Budget Comparison

FINANCE

Cost Center **FY26 FTE** **6.92**
FIN **FY25 REFORECAST FTE** **6.92**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	600,000	600,000	-	0%	929,443	549,069
	TOTAL REVENUE		**600,000**	**600,000**	**-**	**0%**	**929,443**	**549,069**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	3,750	3,750	-	0%	3,765	3,090
	50110	STAFF CONFERENCE & TRAINING	500	500	-	0%	263	303
	50120	STAFF MEMBERSHIP DUES	670	670	-	0%	613	-
	TOTAL DIRECT EXPENSES		**4,920**	**4,920**	**-**	**0%**	**4,641**	**3,394**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	751,265	777,786	26,521	4%	703,552	523,920
	51299	BENEFITS EXPENSE	232,396	209,178	(23,218)	-10%	221,122	155,484
	51900	OTHER INDIRECT EXPENSE	176,878	238,288	61,411	35%	200,758	110,870
	51936	FACILITY RESERVE REBATE	-	-			15,520	-
	TOTAL INDIRECT EXPENSES:		**1,160,539**	**1,225,253**	**64,714**	**6%**	**1,140,952**	**790,275**
	TOTAL ALL EXPENSES:		**1,165,459**	**1,230,173**	**64,714**	**6%**	**1,145,593**	**793,669**
	NET INCOME (LOSS):		**(565,459)**	**(630,173)**	**(64,714)**	**11%**	**(216,150)**	**(244,599)**

Washington State Bar Association
Budget Comparison

FOUNDATION

Cost Center **FOUND**

FY26 FTE 1.05
FY25 REFORECAST FTE 1.05

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
50033		CONSULTING SERVICES	3,200	3,350	150	5%	3,000	3,200
50050		EQUIPMENT, HARDWARE & SOFTWARE	2,400	2,635	235	10%	2,175	1,757
50060		POSTAGE	400	400	-	0%	38	-
50070		PRINTING & COPYING	1,000	1,000	-	0%	452	-
50100		STAFF TRAVEL/PARKING	3,000	4,000	1,000	33%	269	54
50110		STAFF CONFERENCE & TRAINING	2,200	2,200	-	0%	1,473	-
50140		SUPPLIES	2,000	2,000	-	0%	81	103
52940		BOARD OF TRUSTEES	3,600	3,600	-	0%	1,245	492
	TOTAL DIRECT EXPENSES		**17,800**	**19,185**	**1,385**	**8%**	**8,733**	**5,607**
INDIRECT EXPENSES:								
51199		SALARY EXPENSE	106,460	108,755	2,296	2%	100,198	71,415
51299		BENEFITS EXPENSE	34,056	30,528	(3,528)	-10%	37,670	22,276
51900		OTHER INDIRECT EXPENSE	26,838	36,156	9,318	35%	28,230	16,784
	TOTAL INDIRECT EXPENSES:		**167,354**	**175,440**	**8,086**	**5%**	**166,098**	**110,475**
	TOTAL ALL EXPENSES:		**185,154**	**194,625**	**9,471**	**5%**	**174,831**	**116,082**
	NET INCOME (LOSS):		**(185,154)**	**(194,625)**	**(9,471)**	**5%**	**(174,831)**	**(116,082)**

Washington State Bar Association
Budget Comparison

HUMAN RESOURCES

Cost Center	**FY26 FTE**	**4.00**
HR	**FY25 REFORECAST FTE**	**4.00**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50033	CONSULTING SERVICES	10,000	1,000	(9,000)	-90%	-	-
	50100	STAFF TRAVEL/PARKING	300	300	-	0%	122	97
	50110	STAFF CONFERENCE & TRAINING	2,200	4,200	2,000	91%	-	171
	50120	STAFF MEMBERSHIP DUES	1,000	1,200	200	20%	1,036	528
	50130	SUBSCRIPTIONS	2,000	2,000	-	0%	1,904	993
	54512	STAFF TRAINING- GENERAL	36,800	29,300	(7,500)	-20%	10,295	926
	54520	RECRUITING AND ADVERTISING	8,000	8,750	750	9%	6,110	2,290
	54530	HR INFORMATION SYSTEM	50,000	65,950	15,950	32%	47,470	35,260
	54540	SALARY SURVEYS	1,000	3,000	2,000	200%	1,973	-
	54590	TRANSFER TO INDIRECT EXPENSE	(111,300)	(115,700)	(4,400)	4%	(68,911)	(40,266)
	TOTAL DIRECT EXPENSES		-	-	-		-	-
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	585,774	504,229	(81,545)	-14%	537,380	373,174
	51299	BENEFITS EXPENSE	115,845	98,098	(17,746)	-15%	146,941	94,524
	51925	ALLOWANCE FOR OPEN POSITIONS	(200,000)	(200,000)	-	0%	-	-
	51900	OTHER INDIRECT EXPENSE	102,241	137,739	35,498	35%	107,121	64,064
	TOTAL INDIRECT EXPENSES:		**603,860**	**540,066**	**(63,794)**	**-11%**	**791,442**	**531,762**
TOTAL ALL EXPENSES:			**603,860**	**540,066**	**(63,794)**	**-11%**	**791,442**	**531,762**
NET INCOME (LOSS):			**(603,860)**	**(540,066)**	**63,794**	**-11%**	**(791,442)**	**(531,762)**

Washington State Bar Association
Budget Comparison

LAW CLERK PROGRAM

Cost Center	**FY26 FTE**	**1.20**
CLERK	**FY25 REFORECAST FTE**	**1.23**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	42275	LAW CLERK FEES	234,000	220,000	(14,000)	-6%	201,068	238,826
	42286	LAW CLERK APPLICATION FEES	3,200	4,000	800	25%	5,000	3,600
	TOTAL REVENUE		**237,200**	**224,000**	**(13,200)**	**-6%**	**206,068**	**242,426**
DIRECT EXPENSES:								
	50015	DEPRECIATION	12,000	37,278	25,278	211%	-	-
	50100	STAFF TRAVEL/PARKING	-	-	-		24	-
	50130	SUBSCRIPTIONS	250	331	81	32%	276	-
	52245	CHARACTER & FITNESS INVESTI	100	100	-	0%	-	-
	53282	SOFTWARE HOSTING	681	700	19	3%	1,288	449
	52255	LAW CLERK BOARD	8,000	9,000	1,000	13%	5,716	2,727
	52258	LAW CLERK OUTREACH	30,000	20,000	(10,000)	-33%	5,476	-
	TOTAL DIRECT EXPENSES		**51,031**	**67,409**	**16,378**	**32%**	**12,781**	**3,176**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	113,225	108,121	(5,104)	-5%	102,505	75,874
	51299	BENEFITS EXPENSE	38,208	32,683	(5,526)	-14%	30,283	24,420
	51900	OTHER INDIRECT EXPENSE	31,439	41,322	9,882	31%	32,871	19,621
	TOTAL INDIRECT EXPENSES:		**182,873**	**182,126**	**(747)**	**0%**	**165,659**	**119,916**
TOTAL ALL EXPENSES:			**233,904**	**249,535**	**15,631**	**7%**	**178,440**	**123,091**
NET INCOME (LOSS):			**3,296**	**(25,535)**	**(28,831)**	**-875%**	**27,628**	**119,335**

Washington State Bar Association
Budget Comparison

LEGISLATIVE

Cost Center **FY26 FTE** **1.70**
LEG **FY25 REFORECAST FTE** **1.70**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	2,500	2,500	-	0%	83	565
	50110	STAFF CONFERENCE & TRAININC	2,200	2,200	-	0%	1,736	2,101
	50120	STAFF MEMBERSHIP DUES	200	215	15	8%	260	-
	50130	SUBSCRIPTIONS	2,000	2,000	-	0%	1,985	1,986
	50160	TELEPHONE	575	575	-	0%	577	384
	52660	JUD RECOMMEND COMMITTEE	2,250	3,250	1,000	44%	-	1,334
	54920	CONTRACT LOBBYIST	15,000	12,500	(2,500)	-17%	12,500	15,000
	54940	LEGISLATIVE COMMITTEE	1,250	1,250	-	0%	2	130
	54970	BOG LEGISLATIVE COMMITTEE	300	300	-	0%	-	-
	TOTAL DIRECT EXPENSES		**26,275**	**24,790**	**(1,485)**	**-6%**	**17,142**	**21,499**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	160,438	164,492	4,054	3%	152,110	107,712
	51299	BENEFITS EXPENSE	53,043	47,770	(5,273)	-10%	51,366	34,689
	51900	OTHER INDIRECT EXPENSE	43,453	58,539	15,086	35%	45,633	27,186
	TOTAL INDIRECT EXPENSES:		**256,933**	**270,801**	**13,867**	**5%**	**249,109**	**169,586**
	TOTAL ALL EXPENSES:		**283,208**	**295,591**	**12,382**	**4%**	**266,251**	**191,086**
	NET INCOME (LOSS):		**(283,208)**	**(295,591)**	**(12,382)**	**4%**	**(266,251)**	**(191,086)**

Washington State Bar Association
Budget Comparison

LEGAL LUNCHBOX

Cost Center	**FY26 FTE**	**0.45**
LLB	**FY25 REFORECAST FTE**	**0.43**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	41450	SPONSORSHIPS	9,000	9,000	-	0%	9,000	9,000
	43400	DIGITAL VIDEO SALES	25,000	25,000	-	0%	27,097	23,128
	TOTAL REVENUE		**34,000**	**34,000**	**-**	**0%**	**36,097**	**32,128**
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	4,414
	53731	INSURANCE REBATE	(3,375)	-	3,375	-100%	(2,528)	-
	TOTAL DIRECT EXPENSES		**4,725**	**8,100**	**3,375**	**71%**	**3,539**	**4,414**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	31,087	33,193	2,106	7%	29,074	20,656
	51299	BENEFITS EXPENSE	11,797	11,236	(561)	-5%	10,072	7,636
	51900	OTHER INDIRECT EXPENSE	10,991	15,496	4,505	41%	11,215	6,856
	51935	INSURANCE REBATE	(19,016)	-	19,016	-100%	(20,950)	-
	TOTAL INDIRECT EXPENSES:		**34,859**	**59,925**	**25,066**	**72%**	**29,411**	**35,147**
	TOTAL ALL EXPENSES:		**39,584**	**68,025**	**28,441**	**72%**	**32,950**	**39,561**
	NET INCOME (LOSS):		**(5,584)**	**(34,025)**	**(28,441)**	**509%**	**3,147**	**(7,433)**

Washington State Bar Association
Budget Comparison

LICENSING & MEMBERSHIP RECORDS

Cost Center **FY26 FTE** **4.83**
LICMR **FY25 REFORECAST FTE** **4.83**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	41100	STATUS CERTIFICATE FEES	27,000	29,000	2,000	7%	29,600	21,775
	42288	INVESTIGATION FEES	25,000	25,000	-	0%	27,700	18,200
	42290	PRO HAC VICE	425,000	435,000	10,000	2%	496,975	302,873
	45040	MEMBER CONTACT INFORMATION	5,000	5,000	-	0%	5,706	3,498
	45060	PHOTO BAR CARD SALES	200	260	60	30%	276	432
	TOTAL REVENUE		**482,200**	**494,260**	**12,060**	**3%**	**560,257**	**346,778**
DIRECT EXPENSES:								
	50033	CONSULTING SERVICES	6,000	-	(6,000)	-100%	6,000	6,000
	50060	POSTAGE	4,000	4,000	-	0%	14,599	3,725
	52246	INVESTIGATION	-	300	300		-	-
	53282	SOFTWARE HOSTING	18,380	18,380	-	0%	16,105	12,055
	TOTAL DIRECT EXPENSES		**28,380**	**22,680**	**(5,700)**	**-20%**	**36,704**	**21,780**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	515,705	512,035	(3,670)	-1%	421,349	343,811
	51299	BENEFITS EXPENSE	158,553	141,145	(17,409)	-11%	138,247	103,512
	51900	OTHER INDIRECT EXPENSE	123,457	166,320	42,863	35%	102,480	77,302
	TOTAL INDIRECT EXPENSES:		**797,715**	**819,499**	**21,785**	**3%**	**662,076**	**524,625**
	TOTAL ALL EXPENSES:		**826,095**	**842,179**	**16,085**	**2%**	**698,780**	**546,405**
	NET INCOME (LOSS):		**(343,895)**	**(347,919)**	**(4,025)**	**1%**	**(138,523)**	**(199,627)**

Washington State Bar Association
Budget Comparison

LICENSE FEES
Cost Center
LIC

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40600	LICENSE FEES	16,853,241	17,062,474	209,233	1%	16,279,888	10,893,115
	40625	LICENSE FEES - NEW ADMITTEES	429,375	465,192	35,817	8%	423,252	309,735
	40650	LICENSE FEES - LATE FEES	200,000	250,000	50,000	25%	383,255	453,642
	40675	LICENSE FEES - REINSTATEMENTS	10,000	15,000	5,000	50%	27,605	9,955
TOTAL REVENUE			**17,492,616**	**17,792,666**	**300,050**	**2%**	**17,113,999**	**11,666,447**
NET INCOME (LOSS):			**17,492,616**	**17,792,666**	**300,050**	**2%**	**17,113,999**	**11,666,447**

Washington State Bar Association
Budget Comparison

LIMITED LICENSE LEGAL TECHNICIAN PROGRAM

Cost Center **FY26 FTE** **0.45**
LLLT **FY25 REFORECAST FTE** **0.48**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	41800	SEMINAR REGISTRATIONS	7,000	-	(7,000)	-100%	1,045	5,600
	42281	LLLT LICENSE FEES	17,731	17,000	(731)	-4%	15,296	10,702
	42288	INVESTIGATION FEES	-	-	-		100	-
	42291	LLLT LATE LICENSE FEES	-	137	137		404	365
	45220	MCLE LATE FEES	300	150	(150)	-50%	450	150
	TOTAL REVENUE		**25,031**	**17,287**	**(7,744)**	**-31%**	**17,295**	**16,817**
DIRECT EXPENSES:								
	52683	LLLT BOARD	11,500	9,000	(2,500)	-22%	1,341	2,563
	52689	LLLT EDUCATION	1,000	1,000	-	0%	-	35
	TOTAL DIRECT EXPENSES		**12,500**	**10,000**	**(2,500)**	**-20%**	**1,341**	**2,598**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	55,689	44,756	(10,934)	-20%	51,982	39,342
	51299	BENEFITS EXPENSE	17,525	12,790	(4,735)	-27%	13,665	12,234
	51900	OTHER INDIRECT EXPENSE	14,569	15,496	926	6%	14,309	9,903
	TOTAL INDIRECT EXPENSES:		**87,784**	**73,042**	**(14,743)**	**-17%**	**79,955**	**61,479**
	TOTAL ALL EXPENSES:		**100,284**	**83,042**	**(17,243)**	**-17%**	**81,297**	**64,077**
	NET INCOME (LOSS):		**(75,253)**	**(65,755)**	**9,499**	**-13%**	**(64,002)**	**(47,260)**

Washington State Bar Association
Budget Comparison

LIMITED PRACTICE OFFICERS

Cost Center **FY26 FTE** **0.61**
LPO **FY25 REFORECAST FTE** **0.68**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	42288	INVESTIGATION FEES	300	1,000	700	233%	1,500	600
	45110	LPO EXAMINATION FEES	20,000	16,000	(4,000)	-20%	18,600	13,100
	45115	LPO EXAM LATE FEES	3,000	2,000	(1,000)	-33%	2,300	1,600
	45120	LPO LICENSE FEES	160,000	158,000	(2,000)	-1%	156,974	104,206
	45125	LPO LATE LICENSE FEES	2,000	2,000	-	0%	3,600	3,750
	45220	MCLE LATE FEES	4,000	3,000	(1,000)	-25%	3,150	1,800
	TOTAL REVENUE		**189,300**	**182,000**	**(7,300)**	**-4%**	**186,124**	**125,056**
DIRECT EXPENSES:								
	50050	EQUIPMENT, HARDWARE & SOFTWARE	-	-	-		1,240	-
	50070	PRINTING & COPYING	200	200	-	0%	123	34
	50140	SUPPLIES	200	100	(100)	-50%	113	-
	52210	FACILITY, PARKING, FOOD	9,500	9,500	-	0%	7,333	4,612
	52688	EXAM WRITING	19,000	15,000	(4,000)	-21%	8,400	8,400
	55130	LPO BOARD EXPENSES	4,000	4,000	-	0%	278	356
	55165	LPO OUTREACH	1,000	500	(500)	-50%	-	-
	53282	SOFTWARE HOSTING	3,404	3,404	-	0%	3,221	2,233
	TOTAL DIRECT EXPENSES		**37,304**	**32,704**	**(4,600)**	**-12%**	**20,708**	**15,636**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	66,043	61,284	(4,758)	-7%	70,170	44,066
	51299	BENEFITS EXPENSE	21,528	17,431	(4,097)	-19%	18,906	13,606
	51900	OTHER INDIRECT EXPENSE	17,637	21,005	3,369	19%	20,883	11,049
TOTAL INDIRECT EXPENSES:			**105,207**	**99,721**	**(5,486)**	**-5%**	**109,959**	**68,722**
TOTAL ALL EXPENSES:			**142,511**	**132,425**	**(10,086)**	**-7%**	**130,667**	**84,358**
NET INCOME (LOSS):			**46,789**	**49,575**	**2,786**	**6%**	**55,457**	**40,698**

MANDATORY CONTINUING LEGAL EDUCATION

Cost Center **FY26 FTE** **4.76**
MCLE **FY25 REFORECAST FTE** **4.76**

Washington State Bar Association
Budget Comparison

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	45210	ACTIVITY APPLICATION FEE	600,000	670,000	70,000	12%	724,600	487,300
	45215	ACTIVITY APPLICATION LATE FEE	220,000	250,000	30,000	14%	266,650	192,750
	45220	MCLE LATE FEES	225,000	232,000	7,000	3%	266,925	252,200
	45230	ANNUAL ACCREDITED SPONSOR FEES	39,000	36,250	(2,750)	-7%	37,500	39,750
	45250	ATTENDANCE LATE FEES	120,000	120,000	-	0%	120,050	69,400
	45255	COMITY CERTIFICATES - REQUEST	13,800	13,000	(800)	-6%	13,497	12,675
	45260	COMITY CERTIFICATES - SUBMIT	16,000	17,000	1,000	6%	16,575	18,300
	TOTAL REVENUE		**1,233,800**	**1,338,250**	**104,450**	**8%**	**1,445,797**	**1,072,375**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	50	50	-	0%	-	-
	50110	STAFF CONFERENCE & TRAINING	4,600	4,400	(200)	-4%	3,564	-
	50120	STAFF MEMBERSHIP DUES	500	525	25	5%	500	500
	55210	MCLE BOARD EXPENSES	4,000	6,000	2,000	50%	-	1,806
	55220	DEPRECIATION-SOFTWARE	142,183	142,057	(126)	0%	124,381	96,096
	TOTAL DIRECT EXPENSES		**151,333**	**153,032**	**1,699**	**1%**	**128,445**	**98,402**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	400,391	412,275	11,884	3%	445,511	280,754
	51299	BENEFITS EXPENSE	136,403	125,149	(11,254)	-8%	143,462	89,770
	51900	OTHER INDIRECT EXPENSE	121,923	163,909	41,986	34%	157,394	76,532
TOTAL INDIRECT EXPENSES:			**658,717**	**701,333**	**42,617**	**6%**	**746,368**	**447,055**
TOTAL ALL EXPENSES:			**810,050**	**854,365**	**44,316**	**5%**	**874,813**	**545,458**
NET INCOME (LOSS):			**423,750**	**483,885**	**60,134**	**14%**	**570,984**	**526,917**

Washington State Bar Association
Budget Comparison

MEMBER WELLNESS PROGRAM

Cost Center	**FY26 FTE**	**1.48**
MWP	**FY25 REFORECAST FTE**	**1.48**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40205	DIVERSION	10,000	9,000	(1,000)	-10%	11,050	1,500
	TOTAL REVENUE		**10,000**	**9,000**	**(1,000)**	**-10%**	**11,050**	**1,500**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	1,000	1,200	200	20%	-	26
	50110	STAFF CONFERENCE & TRAINING	4,400	5,500	1,100	25%	527	75
	50120	STAFF MEMBERSHIP DUES	800	500	(300)	-38%	267	463
	50130	SUBSCRIPTIONS	1,455	1,400	(55)	-4%	1,324	883
	54715	MEMBER WELL-BEING TASK FORCE	4,250	4,500	250	6%	1,000	1,042
	TOTAL DIRECT EXPENSES		**11,905**	**13,100**	**1,195**	**10%**	**3,117**	**2,489**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	144,902	149,311	4,409	3%	138,488	97,435
	51299	BENEFITS EXPENSE	47,310	42,656	(4,654)	-10%	59,180	30,821
	51900	OTHER INDIRECT EXPENSE	37,829	50,963	13,134	35%	39,832	23,640
	TOTAL INDIRECT EXPENSES:		**230,041**	**242,930**	**12,889**	**6%**	**237,499**	**151,895**
	TOTAL ALL EXPENSES:		**241,946**	**256,030**	**14,084**	**6%**	**240,617**	**154,384**
	NET INCOME (LOSS):		**(231,946)**	**(247,030)**	**(15,084)**	**7%**	**(229,567)**	**(152,884)**

Washington State Bar Association
Budget Comparison

MEMBER SERVICES & ENGAGEMENT

Cost Center **FY26 FTE** **2.45**
MSE **FY25 REFORECAST FTE** **2.45**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40900	ROYALTIES	10,800	10,800	-	0%	12,767	11,150
	41450	SPONSORSHIPS	2,500	2,500	-	0%	2,566	2,000
	41800	SEMINAR REGISTRATIONS	3,000	2,000	(1,000)	-33%	1,980	-
	TOTAL REVENUE		**16,300**	**15,300**	**(1,000)**	**-6%**	**17,313**	**13,150**
DIRECT EXPENSES:								
	50070	PRINTING & COPYING	1,600	1,600	-	0%	-	1,442
	50085	YLL SECTION PROGRAM	1,300	1,300	-	0%	-	585
	50095	CLE COMPS	1,000	-	(1,000)	-100%	-	-
	50100	STAFF TRAVEL/PARKING	3,500	3,500	-	0%	20	82
	50110	STAFF CONFERENCE & TRAINING	2,200	2,700	500	23%	339	1,058
	50120	STAFF MEMBERSHIP DUES	450	1,020	570	127%	150	390
	50130	SUBSCRIPTIONS	350	400	50	14%	-	350
	54391	LAW LIBRARY DESKBOOK ACCESS	10,000	10,000	-	0%	-	9,311
	54610	LIBRARY MATERIALS/RESOURCES	4,000	4,000	-	0%	250	209
	55266	NEW LAWYER OUTREACH EVENTS	5,000	5,000	-	0%	2,029	3,519
	55270	NEW LAWYERS COMMITTEE	15,000	15,000	-	0%	2,584	778
	55970	MEMBER ENGAGEMENT COUNCIL	500	500	-	0%	-	-
	55981	SMALL TOWN AND RURAL COUNCIL OUTREACH AND ACTIVITIES	65,000	70,000	5,000	8%	29,282	45,000
	55980	SMALL TOWN AND RURAL COUNCIL	7,500	7,500	-	0%	55	-
	57460	LAW SCHOOL OUTREACH	500	500	-	0%	-	-
	58175	AWARDS	-	1,000	1,000		-	-
	58450	RECEPTION/FORUM EXPENSE	1,000	1,000	-	0%	149	200
	TOTAL DIRECT EXPENSES		**118,900**	**125,020**	**6,120**	**5%**	**34,857**	**62,925**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	167,441	165,619	(1,822)	-1%	159,996	96,935
	51299	BENEFITS EXPENSE	65,553	59,059	(6,493)	-10%	53,060	40,093
	51900	OTHER INDIRECT EXPENSE	62,623	84,365	21,742	35%	65,742	39,242
	TOTAL INDIRECT EXPENSES:		**295,617**	**309,043**	**13,426**	**5%**	**278,797**	**176,270**
	TOTAL ALL EXPENSES:		**414,517**	**434,063**	**19,546**	**5%**	**313,654**	**239,195**
	NET INCOME (LOSS):		**(398,217)**	**(418,763)**	**(20,546)**	**5%**	**(296,341)**	**(226,045)**

Washington State Bar Association
Budget Comparison

MINI CLE

Cost Center	**FY26 FTE**	**0.96**
MINI	**FY25 REFORECAST FTE**	**0.92**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	TOTAL DIRECT EXPENSES		-	-	-		-	-
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	71,340	76,520	5,180	7%	67,856	48,052
	51299	BENEFITS EXPENSE	26,074	24,764	(1,310)	-5%	21,787	16,997
	51900	OTHER INDIRECT EXPENSE	23,516	33,057	9,542	41%	24,750	14,657
	TOTAL INDIRECT EXPENSES:		**120,930**	**134,341**	**13,411**	**11%**	**114,393**	**79,706**
	NET INCOME (LOSS):		**(120,930)**	**(134,341)**	**(13,411)**	**11%**	**(114,393)**	**(79,706)**

Washington State Bar Association
Budget Comparison

NEW MEMBER EDUCATION

Cost Center	**FY26 FTE**	**0.87**
NME	**FY25 REFORECAST FTE**	**0.84**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40950	NME PRODUCT SALES	150,000	120,000	(30,000)	-20%	114,482	110,368
	41800	SEMINAR REGISTRATIONS	13,000	10,000	(3,000)	-23%	16,455	19,062
	47100	TRIAL ADVOCACY PROGRAM	15,000	12,000	(3,000)	-20%	12,098	-
	TOTAL REVENUE		**178,000**	**142,000**	**(36,000)**	**-20%**	**143,035**	**129,445**
DIRECT EXPENSES:								
	55265	SPEAKERS & PROGRAM DEVELOPMENT	575	500	(75)	-13%	-	-
	57320	TRIAL ADVOCACY EXPENSES	2,025	3,200	1,175	58%	1,254	-
	TOTAL DIRECT EXPENSES		**2,600**	**3,700**	**1,100**	**42%**	**1,254**	**-**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	63,225	66,306	3,081	5%	58,755	42,283
	51299	BENEFITS EXPENSE	23,475	22,014	(1,461)	-6%	20,580	15,270
	51900	OTHER INDIRECT EXPENSE	21,471	29,958	8,488	40%	22,430	13,475
	TOTAL INDIRECT EXPENSES:		**108,171**	**118,278**	**10,108**	**9%**	**101,764**	**71,027**
	TOTAL ALL EXPENSES:		**110,771**	**121,978**	**11,208**	**10%**	**103,019**	**71,027**
	NET INCOME (LOSS):		**67,229**	**20,022**	**(47,208)**	**-70%**	**40,017**	**58,418**

Washington State Bar Association
Budget Comparison

OFFICE OF GENERAL COUNSEL

Cost Center	**FY26 FTE**	**6.12**
OGC	**FY25 REFORECAST FTE**	**6.47**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 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	-	0%	-	2,226
	50110	STAFF CONFERENCE & TRAINING	6,215	10,250	4,035	65%	3,094	363
	50120	STAFF MEMBERSHIP DUES	2,090	2,500	410	20%	1,075	1,825
	52240	DISABILITY ACCOMMODATIONS	6,000	2,500	(3,500)	-58%	532	667
	54360	LITIGATION EXPENSES	1,000	1,000	-	0%	3	148
	55419	COURT RULES COMMITTEE	1,000	1,000	-	0%	-	-
	55615	WILLS	2,000	1,000	(1,000)	-50%	-	-
	55620	CUSTODIANSHIP	5,000	5,000	-	0%	125	201
	TOTAL DIRECT EXPENSES		**26,805**	**26,750**	**(55)**	**0%**	**4,829**	**5,355**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	682,130	718,300	36,170	5%	700,467	445,570
	51299	BENEFITS EXPENSE	210,435	187,732	(22,703)	-11%	180,093	134,655
	51900	OTHER INDIRECT EXPENSE	158,347	210,741	52,394	33%	162,422	97,124
TOTAL INDIRECT EXPENSES:			**1,050,911**	**1,116,772**	**65,861**	**6%**	**1,042,982**	**677,348**
TOTAL ALL EXPENSES:			**1,077,716**	**1,143,522**	**65,806**	**6%**	**1,047,812**	**682,704**
NET INCOME (LOSS):			**(1,077,716)**	**(1,143,522)**	**(65,806)**	**6%**	**(1,047,070)**	**(682,434)**

Washington State Bar Association
Budget Comparison

OFFICE OF THE EXECUTIVE DIRECTOR

Cost Center **FY26 FTE** **4.23**
OED **FY25 REFORECAST FTE** **3.90**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	2,000	2,000	-	0%	2,485	1,507
	50110	STAFF CONFERENCE & TRAINING	8,800	13,300	4,500	51%	9,179	10,846
	50120	STAFF MEMBERSHIP DUES	2,175	1,335	(840)	-39%	1,240	1,120
	52125	LEADERSHIP TRAINING	20,000	20,000	-	0%	16,016	5,122
	52585	WASHINGTON LEADERSHIP INSTITUTE	100,000	100,000	-	0%	80,000	100,000
	52840	ED TRAVEL & OUTREACH	6,000	6,000	-	0%	5,601	2,129
	TOTAL DIRECT EXPENSES		**138,975**	**142,635**	**3,660**	**3%**	**114,521**	**120,724**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	602,222	643,856	41,634	7%	490,689	406,627
	51299	BENEFITS EXPENSE	153,250	142,505	(10,745)	-7%	134,228	110,270
	51900	OTHER INDIRECT EXPENSE	99,685	145,659	45,974	46%	77,730	67,735
	TOTAL INDIRECT EXPENSES:		**855,157**	**932,020**	**76,863**	**9%**	**702,647**	**584,632**
	TOTAL ALL EXPENSES:		**994,132**	**1,074,655**	**80,523**	**8%**	**817,168**	**705,357**
	NET INCOME (LOSS):		**(994,132)**	**(1,074,655)**	**(80,523)**	**8%**	**(817,168)**	**(705,357)**

Washington State Bar Association
Budget Comparison

OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD

Cost Center **FY26 FTE** **1.30**
OGCDB **FY25 REFORECAST FTE** **1.30**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50110	STAFF CONFERENCE & TRAINING	2,000	2,200	200	10%	-	-
	50120	STAFF MEMBERSHIP DUES	100	100	-	0%	-	-
	54310	COURT REPORTERS	25,000	33,100	8,100	32%	44,538	17,271
	55310	DISCIPLINARY BOARD EXPENSES	5,000	3,000	(2,000)	-40%	797	868
	55320	CHIEF HEARING OFFICER	40,000	41,200	1,200	3%	39,996	26,664
	55330	HEARING OFFICER EXPENSES	4,000	4,000	-	0%	874	79
	55340	HEARING OFFICER TRAINING	1,000	1,000	-	0%	-	-
	55370	APPOINTED COUNSEL	50,400	50,645	245	0%	49,600	33,600
	55380	DISCIPLINARY SELECTION PANEL	1,000	1,000	-	0%	-	-
	TOTAL DIRECT EXPENSES		**128,500**	**136,245**	**7,745**	**6%**	**135,804**	**78,482**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	125,704	128,774	3,070	2%	135,940	86,136
	51299	BENEFITS EXPENSE	41,128	37,003	(4,124)	-10%	37,123	27,198
	51900	OTHER INDIRECT EXPENSE	33,228	44,765	11,537	35%	37,512	20,803
	TOTAL INDIRECT EXPENSES:		**200,060**	**210,543**	**10,482**	**5%**	**210,574**	**134,137**
	TOTAL ALL EXPENSES:		**328,560**	**346,788**	**18,227**	**6%**	**346,378**	**212,619**
	NET INCOME (LOSS):		**(328,560)**	**(346,788)**	**(18,227)**	**6%**	**(346,378)**	**(212,619)**

Washington State Bar Association
Budget Comparison

PRACTICE OF LAW BOARD

Cost Center **FY26 FTE** **0.50**
PLB **FY25 REFORECAST FTE** **0.35**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	-	200	200		-	-
	55510	PRACTICE OF LAW BOARD	16,000	16,000	-	0%	1,157	523
	TOTAL DIRECT EXPENSES		**16,000**	**16,200**	**200**	**1%**	**1,157**	**523**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	44,050	54,953	10,903	25%	48,544	29,310
	51299	BENEFITS EXPENSE	15,037	14,910	(127)	-1%	18,779	9,876
	51900	OTHER INDIRECT EXPENSE	11,502	17,217	5,715	50%	14,695	7,950
	TOTAL INDIRECT EXPENSES:		**70,590**	**87,080**	**16,491**	**23%**	**82,019**	**47,136**
	TOTAL ALL EXPENSES:		**86,590**	**103,280**	**16,691**	**19%**	**83,176**	**47,660**
	NET INCOME (LOSS):		**(86,590)**	**(103,280)**	**(16,691)**	**19%**	**(83,176)**	**(47,660)**

Washington State Bar Association
Budget Comparison

PRACTICE MANAGEMENT ASSISTANCE

Cost Center	**FY26 FTE**	**0.95**						
PMA	**FY25 REFORECAST FTE**	**0.95**						
			FY2025 Reforecast	**FY2026 Budget**	**FY25 vs. FY26 Comparison**	**% Change**	**FY2024 Actuals YTD**	**FY2025 Actuals YTD**
REVENUE:								
	40900	ROYALTIES	62,000	62,000	-	0%	69,581	50,570
	TOTAL REVENUE		**62,000**	**62,000**	**-**	**0%**	**69,581**	**50,570**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	1,000	2,500	1,500	150%	386	265
	50110	STAFF CONFERENCE & TRAINING	2,500	2,400	(100)	-4%	-	3,003
	50120	STAFF MEMBERSHIP DUES	150	295	145	97%	150	-
	54645	LEGAL TECH TASK FORCE	5,000	3,500	(1,500)	-30%	-	2,750
	55250	VLEX FASTCASE	85,000	87,000	2,000	2%	84,042	84,568
	TOTAL DIRECT EXPENSES		**93,650**	**95,695**	**2,045**	**2%**	**84,578**	**90,586**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	89,534	92,930	3,396	4%	83,474	60,005
	51299	BENEFITS EXPENSE	29,659	26,882	(2,777)	-9%	24,903	19,348
	51900	OTHER INDIRECT EXPENSE	24,282	32,713	8,431	35%	25,523	15,129
	TOTAL INDIRECT EXPENSES:		**143,475**	**152,525**	**9,050**	**6%**	**133,901**	**94,482**
	TOTAL ALL EXPENSES:		**237,125**	**248,220**	**11,095**	**5%**	**218,479**	**185,068**
	NET INCOME (LOSS):		**(175,125)**	**(186,220)**	**(11,095)**	**6%**	**(148,897)**	**(134,499)**

Washington State Bar Association
Budget Comparison

PROFESSIONAL RESPONSIBILITY PROGRAM

Cost Center	**FY26 FTE**	**1.08**
PRP	**FY25 REFORECAST FTE**	**1.08**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	4,000	4,000	-	0%	1,761	778
	50110	STAFF CONFERENCE & TRAINING	2,200	2,400	200	9%	-	1,542
	50120	STAFF MEMBERSHIP DUES	500	590	90	18%	400	590
	55610	CPE COMMITTEE	1,000	1,000	-	0%	386	286
	TOTAL DIRECT EXPENSES		**7,700**	**7,990**	**290**	**4%**	**2,547**	**3,196**
INDIRECT EXPENSES:					-			
	51199	SALARY EXPENSE	141,621	143,536	1,915	1%	138,684	95,410
	51299	BENEFITS EXPENSE	40,867	36,061	(4,806)	-12%	62,414	26,720
	51900	OTHER INDIRECT EXPENSE	27,605	37,190	9,584	35%	29,391	17,257
	TOTAL INDIRECT EXPENSES:		**210,093**	**216,787**	**6,693**	**3%**	**230,489**	**139,387**
	TOTAL ALL EXPENSES:		**217,793**	**224,777**	**6,983**	**3%**	**233,036**	**142,583**
	NET INCOME (LOSS):		**(217,793)**	**(224,777)**	**(6,983)**	**3%**	**(233,036)**	**(142,583)**

Washington State Bar Association
Budget Comparison

PUBLIC SERVICE PROGRAMS

Cost Center	**FY26 FTE**	**1.62**
PSP	**FY25 REFORECAST FTE**	**1.62**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40300	DONATIONS & GRANTS	135,280	132,635	(2,645)	-2%	130,000	134,832
	TOTAL REVENUE		**135,280**	**132,635**	**(2,645)**	**-2%**	**130,000**	**134,832**
DIRECT EXPENSES:								
	50037	DONATIONS/SPONSORSHIPS/GRANTS	300,000	-	(300,000)	-100%	278,889	238,011
	50100	STAFF TRAVEL/PARKING	2,000	2,000	-	0%	333	142
	50110	STAFF CONFERENCE & TRAINING	2,200	3,200	1,000	45%	-	775
	52110	PRO BONO & PUBLIC SERVICE COMMITTEE	2,500	3,500	1,000	40%	782	323
	54130	PRO BONO OUTREACH	4,000	4,000	-	0%	1,978	1,087
	TOTAL DIRECT EXPENSES		**310,700**	**12,700**	**(298,000)**	**-96%**	**281,983**	**240,338**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	136,915	142,419	5,504	4%	117,051	90,900
	51299	BENEFITS EXPENSE	47,862	43,595	(4,267)	-9%	37,768	31,079
	51900	OTHER INDIRECT EXPENSE	41,408	55,784	14,376	35%	43,312	26,004
	TOTAL INDIRECT EXPENSES:		**226,185**	**241,799**	**15,613**	**7%**	**198,131**	**147,983**
	TOTAL ALL EXPENSES:		**536,885**	**254,499**	**(282,387)**	**-53%**	**480,114**	**388,321**
	NET INCOME (LOSS):		**(401,605)**	**(121,863)**	**279,742**	**-70%**	**(350,114)**	**(253,489)**

Washington State Bar Association
Budget Comparison

PUBLICATION & DESIGN SERVICES

Cost Center	**FY26 FTE**	**0.89**
PUB	**FY25 REFORECAST FTE**	**0.89**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50130	SUBSCRIPTIONS	200	200	-	0%	88	88
	54026	IMAGE LIBRARY	4,800	4,800	-	0%	4,752	4,756
	TOTAL DIRECT EXPENSES		**5,000**	**5,000**	**-**	**0%**	**4,840**	**4,844**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	76,345	70,644	(5,701)	-7%	76,767	54,682
	51299	BENEFITS EXPENSE	26,506	22,914	(3,592)	-14%	21,510	17,812
	51900	OTHER INDIRECT EXPENSE	22,749	30,647	7,898	35%	23,976	14,184
	TOTAL INDIRECT EXPENSES:		**125,600**	**124,205**	**(1,395)**	**-1%**	**122,253**	**86,678**
	TOTAL ALL EXPENSES:		**130,600**	**129,205**	**(1,395)**	**-1%**	**127,093**	**91,522**
	NET INCOME (LOSS):		**(130,600)**	**(129,205)**	**1,395**	**-1%**	**(127,093)**	**(91,522)**

Washington State Bar Association
Budget Comparison

REGULATORY SERVICES FTE

Cost Center	**FY26 FTE**	**2.05**
RSD FTE	**FY25 REFORECAST FTE**	**2.20**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	600	600	-	0%	438	265
	50110	STAFF CONFERENCE & TRAINING	8,400	11,500	3,100	37%	5,913	932
	50120	STAFF MEMBERSHIP DUES	490	490	-	0%	350	490
	TOTAL DIRECT EXPENSES		**9,490**	**12,590**	**3,100**	**33%**	**6,700**	**1,688**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	299,450	297,784	(1,666)	-1%	353,064	201,240
	51299	BENEFITS EXPENSE	84,363	70,359	(14,004)	-17%	102,161	55,789
	51900	OTHER INDIRECT EXPENSE	56,872	70,591	13,719	24%	69,609	35,924
	TOTAL INDIRECT EXPENSES:		**440,685**	**438,735**	**(1,950)**	**0%**	**524,834**	**292,953**
	TOTAL ALL EXPENSES:		**450,175**	**451,325**	**1,150**	**0%**	**531,535**	**294,641**
	NET INCOME (LOSS):		**(450,175)**	**(451,325)**	**(1,150)**	**0%**	**(531,535)**	**(294,641)**

Washington State Bar Association
Budget Comparison

REGULATORY REFORM

Cost Center	**FY26 FTE**	**0.90**
RR	**FY25 REFORECAST FTE**	**1.80**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**	**-**	**-**	**-**
DIRECT EXPENSES:								
	50033	CONSULTING SERVICES	72,500	25,000	(47,500)	-66%	-	10,311
	50185	MEETING EXPENSE	-	2,000	2,000		-	2,098
	52691	OUTREACH EXPENSES	10,000	10,000	-	0%	-	-
	53282	SOFTWARE HOSTING	-	20,000	20,000		-	-
	TOTAL DIRECT EXPENSES		**82,500**	**57,000**	**(25,500)**	**-31%**	**-**	**12,409**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	157,764	119,875	(37,889)	-24%	-	87,449
	51299	BENEFITS EXPENSE	46,175	29,651	(16,524)	-36%	-	24,260
	51900	OTHER INDIRECT EXPENSE	32,589	30,991	(1,598)	-5%	-	15,301
	TOTAL INDIRECT EXPENSES:		**236,528**	**180,517**	**(56,011)**	**-24%**	**-**	**127,011**
	TOTAL ALL EXPENSES:		**319,028**	**237,517**	**(81,511)**	**-26%**	**-**	**139,420**
	NET INCOME (LOSS):		**(319,028)**	**(237,517)**	**81,511**	**-26%**	**-**	**(139,420)**

Washington State Bar Association
Budget Comparison

SECTIONS ADMINISTRATION

Cost Center **FY26 FTE** **2.53**
SECT **FY25 REFORECAST FTE** **2.53**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	48010	REIMBURSEMENTS FROM SECTIONS	275,000	275,000	-	0%	275,415	363,118
	TOTAL REVENUE		**275,000**	**275,000**	**-**	**0%**	**275,415**	**363,118**
DIRECT EXPENSES:								
	50100	STAFF TRAVEL/PARKING	1,500	1,900	400	27%	59	60
	50120	STAFF MEMBERSHIP DUES	200	-	(200)	-100%	-	60
	50130	SUBSCRIPTIONS	-	-	-		331	-
	52540	SECTION/COMMITTEE CHAIR MTGS	700	500	(200)	-29%	80	89
	TOTAL DIRECT EXPENSES		**2,400**	**2,400**	**-**	**0%**	**470**	**209**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	169,092	174,309	5,217	3%	160,918	108,609
	51299	BENEFITS EXPENSE	67,073	61,514	(5,559)	-8%	67,620	43,010
	51900	OTHER INDIRECT EXPENSE	64,668	87,120	22,452	35%	69,223	40,860
	TOTAL INDIRECT EXPENSES:		**300,832**	**322,943**	**22,111**	**7%**	**297,761**	**192,480**
	TOTAL ALL EXPENSES:		**303,232**	**325,343**	**22,111**	**7%**	**298,231**	**192,689**
	NET INCOME (LOSS):		**(28,232)**	**(50,343)**	**(22,111)**	**78%**	**(22,816)**	**170,429**

Washington State Bar Association
Budget Comparison

TECHNOLOGY

Cost Center **FY26 FTE** **5.00**
TECH **FY25 REFORECAST FTE** **12.00**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		-	-	-		-	-
DIRECT EXPENSES:								
	50033	CONSULTING SERVICES	140,000	1,019,797	879,797	628%	270,160	101,256
	50100	STAFF TRAVEL/PARKING	1,000	1,000	-	0%	786	771
	50110	STAFF CONFERENCE & TRAINING	6,000	6,000	-	0%	823	1,091
	50120	STAFF MEMBERSHIP DUES	300	410	110	37%	120	-
	50160	TELEPHONE	90,000	90,000	-	0%	86,328	56,739
	55911	CLOUD INFRASTRUCTURE	130,000	130,000	-	0%	43,143	39,237
	56100	COMPUTER HARDWARE	66,200	65,000	(1,200)	-2%	64,018	60,179
	56150	COMPUTER SOFTWARE	530,000	518,000	(12,000)	-2%	268,912	295,950
	56225	HARDWARE SERVICE & WARRANTIES	50,000	50,000	-	0%	30,498	34,392
	56230	SOFTWARE MAINT & LICENSING	400,000	470,000	70,000	18%	338,290	340,918
	56550	THIRD PARTY SERVICES	65,000	177,600	112,600	173%	38,658	48,763
	56900	TRANSFER TO INDIRECT EXPENSES	(1,478,500)	(2,527,807)	(1,049,307)	71%	(1,141,736)	(979,297)
	TOTAL DIRECT EXPENSES		-	-	-		-	**(0)**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	1,422,045	629,276	(792,769)	-56%	1,419,189	935,789
	51299	BENEFITS EXPENSE	421,171	158,341	(262,830)	-62%	426,935	256,527
	51955	CAPITAL LABOR & OVERHEAD	(75,000)	-	75,000	-100%	(75,555)	(93,204)
	51900	OTHER INDIRECT EXPENSE	306,724	172,174	(134,551)	-44%	348,046	192,664
	TOTAL INDIRECT EXPENSES:		**2,074,941**	**959,791**	**(1,115,150)**	**-54%**	**2,118,614**	**1,291,775**
	TOTAL ALL EXPENSES:		**2,074,941**	**959,791**	**(1,115,150)**	**-54%**	**2,118,614**	**1,291,775**
	NET INCOME (LOSS):		**(2,074,941)**	**(959,791)**	**1,115,150**	**-54%**	**(2,118,614)**	**(1,291,775)**

Washington State Bar Association
Budget Comparison

VOLUNTEER ENGAGEMENT

Cost Center **FY26 FTE** **1.70**
VE **FY25 REFORECAST FTE** **1.20**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	TOTAL REVENUE		**-**	**-**	**-**		**-**	**-**
DIRECT EXPENSES:								
	50060	POSTAGE	600	600	-	0%	571	468
	50110	STAFF CONFERENCE & TRAINING	5,200	4,500	(700)	-13%	1,749	-
	50120	STAFF MEMBERSHIP DUES	450	385	(65)	-14%	300	300
	50130	SUBSCRIPTIONS	816	816	-	0%	815	716
	52520	ABA DELEGATES	16,000	18,000	2,000	13%	18,649	5,360
	52521	VOLUNTEER RECOGNITION	2,000	2,000	-	0%	-	-
	57450	REGULATORY SCHOOL	12,000	10,000	(2,000)	-17%	-	7,767
	TOTAL DIRECT EXPENSES		**37,066**	**36,301**	**(765)**	**-2%**	**22,084**	**14,611**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	127,293	149,220	21,927	17%	60,598	80,735
	51299	BENEFITS EXPENSE	43,900	45,777	1,876	4%	20,940	29,056
	51900	OTHER INDIRECT EXPENSE	37,063	58,539	21,477	58%	16,242	25,339
	TOTAL INDIRECT EXPENSES:		**208,256**	**253,536**	**45,280**	**22%**	**97,781**	**135,130**
	TOTAL ALL EXPENSES:		**245,322**	**289,837**	**44,515**	**18%**	**119,864**	**149,741**
	NET INCOME (LOSS):		**(245,322)**	**(289,837)**	**(44,515)**	**18%**	**(119,864)**	**(149,741)**

ATTACHMENT C

Washington State Bar Association
Budget Comparison

CLE - PRODUCTS

Cost Center **FY26 FTE** **1.29**
CLEP **FY25 REFORECAST FTE** **1.29**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	41000	SHIPPING & HANDLING	210	210	-	0%	99	90
	43200	COURSEBOOK SALES	3,500	3,500	-	0%	1,060	650
	43400	DIGITAL VIDEO SALES	845,000	875,000	30,000	4%	1,030,455	673,481
	TOTAL REVENUE		**848,710**	**878,710**	**30,000**	**4%**	**1,031,614**	**674,221**
DIRECT EXPENSES:								
	50034	IT EXPENSE DUE TO GF	-	179	179		-	-
	50120	STAFF MEMBERSHIP DUES	300	300	-	0%	-	-
	52240	DISABILITY ACCOMMODATIONS	2,000	2,000	-	0%	584	-
	53220	COST OF SALES - COURSEBOOKS	300	300	-	0%	69	48
	53260	OBSOLETE INVENTORY	-	-	-		2,806	-
	53255	CLE-EQUIP-DEPRECIATION	2,012	-	(2,012)	-100%	2,040	1,360
	53285	ONLINE PRODUCT HOSTING EXPENSES	54,000	54,000	-	0%	49,000	26,137
	53330	POSTAGE & DELIVRY-COURSEBOOKS	200	200	-	0%	43	53
	TOTAL DIRECT EXPENSES		**58,812**	**56,979**	**(1,833)**	**-3%**	**54,542**	**27,598**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	102,132	99,556	(2,576)	-3%	96,650	67,827
	51299	BENEFITS EXPENSE	36,973	32,846	(4,126)	-11%	44,297	23,902
	51900	OTHER INDIRECT EXPENSE	32,973	37,620	4,648	14%	32,170	20,566
	51936	FACILITY RESERVE REBATE	-	-	-		(2,248)	-
	TOTAL INDIRECT EXPENSES:		**172,078**	**170,023**	**(2,055)**	**-1%**	**170,869**	**112,296**
TOTAL ALL EXPENSES:			**230,890**	**227,002**	**(3,888)**	**-2%**	**225,411**	**139,894**
NET INCOME (LOSS):			**617,820**	**651,708**	**33,888**	**5%**	**806,202**	**534,327**

Washington State Bar Association
Budget Comparison

CLE - SEMINARS

Cost Center **CLES**

FY26 FTE 6.66
FY25 REFORECAST FTE 6.71

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	41800	SEMINAR REGISTRATIONS	725,000	730,535	5,535	1%	651,706	379,159
	41825	SEMINAR REVENUE-OTHER	20,000	32,500	12,500	63%	51,802	14,600
	41850	SEMINAR SPLITS W/ CLE	(150,000)	(150,000)	-	0%	(135,134)	-
	TOTAL REVENUE		**595,000**	**613,035**	**18,035**	**3%**	**568,375**	**393,759**
DIRECT EXPENSES:								
	50034	IT EXPENSE DUE TO GF	-	924	924		-	-
	50050	EQUIPMENT, HARDWARE & SOFTWARE	-	-	-		2,596	-
	50100	STAFF TRAVEL/PARKING	15,000	16,500	1,500	10%	14,718	1,365
	50110	STAFF CONFERENCE & TRAINING	5,900	3,700	(2,200)	-37%	2,092	-
	50120	STAFF MEMBERSHIP DUES	1,200	1,200	-	0%	1,091	-
	50130	SUBSCRIPTIONS	-	1,300	1,300		-	-
	50140	SUPPLIES	500	1,000	500	100%	379	-
	52240	DISABILITY ACCOMMODATIONS	5,000	5,000	-	0%	3,219	-
	53610	COURSEBOOK PRODUCTION	500	150	(350)	-70%	18	-
	53640	ACCREDITATION FEES	3,000	2,500	(500)	-17%	1,822	1,980
	53690	FACILITIES	165,000	175,000	10,000	6%	173,104	93,757
	53700	SPEAKERS & PROGRAM DEVELOP	48,000	45,700	(2,300)	-5%	36,399	6,049
	53730	HONORARIUM	3,000	3,000	-	0%	-	-
	53740	CLE SEMINAR COMMITTEE	200	200	-	0%	-	-
	TOTAL DIRECT EXPENSES		**247,300**	**256,174**	**8,874**	**4%**	**235,438**	**103,151**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	528,792	514,912	(13,880)	-3%	487,488	332,076
	51299	BENEFITS EXPENSE	191,718	169,646	(22,072)	-12%	178,180	120,872
	51900	OTHER INDIRECT EXPENSE	171,510	194,227	22,716	13%	165,230	107,561
	51936	FACILITY RESERVE REBATE	-	-			(11,500)	-
	TOTAL INDIRECT EXPENSES:		**892,020**	**878,784**	**(13,236)**	**-1%**	**819,399**	**560,509**
	TOTAL ALL EXPENSES:		**1,139,320**	**1,134,958**	**(4,362)**	**0%**	**1,054,836**	**663,660**
	NET INCOME (LOSS):		**(544,320)**	**(521,923)**	**22,397**	**-4%**	**(486,461)**	**(269,901)**

DESKBOOKS

Cost Center **FY26 FTE** **1.75**
DESK **FY25 REFORECAST FTE** **1.75**

Washington State Bar Association
Budget Comparison

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	43100	DESKBOOK SALES	30,000	5,120	(24,880)	-83%	18,240	7,495
	43450	SECTION PUBLICATION SALES	1,000	-	(1,000)	-100%	630	90
	43455	LEXIS/NEXIS ROYALTIES	75,000	75,000	-	0%	69,907	32,457
	43525	CASEMAKER ROYALTIES	25,000	25,000	-	0%	37,575	17,350
	TOTAL REVENUE		**131,000**	**105,120**	**(25,880)**	**-20%**	**126,352**	**57,392**
DIRECT EXPENSES:								
	50110	STAFF CONFERENCE & TRAINING	-	2,200	2,200		-	-
	50120	STAFF MEMBERSHIP DUES	250	330	80	32%	248	-
	50130	SUBSCRIPTIONS	50	50	-	0%	43	-
	53210	COST OF SALES - DESKBOOKS	5,000	2,800	(2,200)	-44%	5,154	1,162
	53225	COST OF SALES - SECTION PUBLIC	500	-	(500)	-100%	429	74
	53260	OBSOLETE INVENTORY	48,250	118,700	70,450	146%	4,122	-
	53265	SPLITS TO SECTIONS	300	-	(300)	-100%	185	-
	53270	DESKBOOK ROYALTIES	300	-	(300)	-100%	305	-
	53320	POSTAGE & DELIVRY-COURSEBOOKS	300	300	-	0%	-	-
	TOTAL DIRECT EXPENSES		**54,950**	**124,380**	**69,430**	**126%**	**10,486**	**1,236**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	178,087	145,047	(33,041)	-19%	159,210	134,078
	51299	BENEFITS EXPENSE	56,847	45,925	(10,922)	-19%	51,270	36,703
	51900	OTHER INDIRECT EXPENSE	44,731	51,036	6,305	14%	44,086	28,131
	TOTAL INDIRECT EXPENSES:		**279,665**	**242,008**	**(37,658)**	**-13%**	**254,566**	**198,913**
TOTAL ALL EXPENSES:			**334,615**	**366,387**	**31,772**	**9%**	**265,052**	**200,149**
NET INCOME (LOSS):			**(203,615)**	**(261,267)**	**(57,652)**	**28%**	**(138,699)**	**(142,757)**

ATTACHMENT D

Washington State Bar Association
Budget Comparison

CLIENT PROTECTION FUND

Cost Center	**FY26 FTE**	**1.23**
CPF	**FY25 REFORECAST FTE**	**1.23**

			FY2025 Reforecast	FY2026 Budget	FY25 vs. FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	200,000	200,000	-	0%	268,185	146,562
	44820	CPF RESTITUTION	10,000	10,000	-	0%	27,839	18,812
	44840	CPF MEMBER ASSESSMENTS	720,540	735,480	14,940	2%	548,235	711,840
	TOTAL REVENUE		**930,540**	**945,480**	**14,940**	**2%**	**844,259**	**877,215**
DIRECT EXPENSES:								
	50020	BANK FEES	2,500	500	(2,000)	-80%	(3,210)	(2,835)
	50110	STAFF CONFERENCE & TRAINING	1,700	4,400	2,700	159%	-	-
	50120	STAFF MEMBERSHIP DUES	200	200	-	0%	200	-
	54810	GIFTS TO INJURED CLIENTS	500,000	500,000	-	0%	418,710	(80,480)
	54820	CPF BOARD	2,000	2,000	-	0%	887	353
	TOTAL DIRECT EXPENSES		**506,400**	**507,100**	**700**	**0%**	**416,587**	**(82,963)**
INDIRECT EXPENSES:								
	51199	SALARY EXPENSE	115,160	117,501	2,340	2%	110,405	77,516
	51299	BENEFITS EXPENSE	38,272	34,425	(3,847)	-10%	40,214	24,995
	51900	OTHER INDIRECT EXPENSE	31,439	42,355	10,915	35%	31,099	19,621
	51936	FACILITY RESERVE REBATE	-	-			(1,773)	-
	TOTAL INDIRECT EXPENSES:		**184,871**	**194,280**	**9,409**	**5%**	**179,946**	**122,132**
	TOTAL ALL EXPENSES:		**691,271**	**701,380**	**10,109**	**1%**	**596,532**	**39,169**
	NET INCOME (LOSS):		**239,269**	**244,100**	**4,831**	**2%**	**247,727**	**838,046**

ATTACHMENT E

Washington State Bar Association
Section Budget Comparison

All Sections

SECTOPS

			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	48200	SECTION DUES	328,673	342,113	13,440	4%	425,235	427,341
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	109,608	109,570	(38)	0%	-	141,745
		TOTAL SECTION DUES REVENUE	**438,280**	**451,683**	**13,402**	**3%**	**425,235**	**569,086**
	41855	CLE SECTION SPLITS PROJECTIONS	-	-	-		-	-
	40500	INTEREST INCOME	2,050	-	(2,050)	-100%	108,323	-
	40800	PUBLICATIONS REVENUE	1,250	1,250	-	0%	1,949	2,279
		OTHER	44,203	43,023	(1,180)	-3%	43,100	24,265
		SEMINAR PROFIT SHARE	159,700	157,850	(1,850)	-1%	167,365	-
	TOTAL REVENUE		**645,483**	**653,806**	**8,322**	**1%**	**745,972**	**595,631**
DIRECT EXPENSES:								
		DIRECT EXPENSES OF SECTION ACTIVITIES	759,773	779,214	19,441	3%	317,333	220,596
		REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES	280,433	280,989	557	0%	275,378	363,118
	TOTAL DIRECT EXPENSES		**1,040,206**	**1,060,203**	**19,998**	**2%**	**592,711**	**583,715**
	NET INCOME (LOSS):		**(394,722)**	**(406,398)**	**(11,676)**	**3%**	**153,261**	**11,916**

Washington State Bar Association
Section Budget Comparison

			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
SACPU		**ANTITRUST, CONSUMER PROTECTION & UNFAIR BUSINESS PRACTICES SECTION**						
REVENUE:								
	40500	INTEREST - INVESTMENTS	548	-	(548)	-100%	3,354	-
	41805	MINI-CLE REVENUE	240	240	-	0%	370	195
	48200	SECTION DUES REVENUE	3,450	3,656	206	6%	4,943	4,800
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,161	1,153	(8)	-1%	-	1,648
		TOTAL SECTION DUES REVENUE	**4,611**	**4,809**	**198**		**4,943**	**6,448**
	TOTAL REVENUE		**5,399**	**5,049**	**(350)**	(0)	**8,667**	**6,643**
DIRECT EXPENSES:								
	58300	EXECUTIVE COMMITTEE EXPENSES	750	750	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	500	500	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	100	100	-	0%	-	-
	58400	PER MEMBER CHARGE	2,546	2,742	196	8%	3,664	3,542
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	857	851	(6)	-1%	-	1,221
		TOTAL PER MEMBER CHARGE	**3,403**	**3,593**	**190**	6%	**3,664**	**4,764**
	58450	RECEPTION/FORUM EXPENSE	690	690	-	0%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	6,000	6,000	-	0%	-	-
	58615	LAW SCHOOL OUTREACH	1,000	1,000	-	0%	-	452
	58620	MINI-CLE EXPENSE	1,500	1,500	-	0%	516	12
	TOTAL DIRECT EXPENSES		**13,943**	**14,133**	**190**	**1%**	**4,180**	**5,227**
	NET INCOME (LOSS):		**(8,544)**	**(9,084)**	**(540)**	**6%**	**4,487**	**1,415**
	NEW FUND BALANCE:		**57,100**	**48,016**	**(9,084)**	**-16%**	**65,644**	**67,060**

Washington State Bar Association
Section Budget Comparison

			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
SADM		**ADMINISTRATIVE LAW SECTION**						
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		2,539	-
	40800	PUBLICATIONS REVENUE	1,250	1,250	-	0%	1,949	2,279
	41805	MINI-CLE REVENUE	7,500	7,500	-	0%	7,865	3,345
	48200	SECTION DUES REVENUE	5,175	5,175	-	0%	7,056	6,990
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,875	1,763	(113)	-6%	-	2,352
		TOTAL SECTION DUES REVENUE	**7,050**	**6,938**	**(113)**	**-6%**	**7,056**	**9,342**
	TOTAL REVENUE		**15,800**	**15,688**	**(113)**	**-1%**	**19,409**	**14,966**
DIRECT EXPENSES:								
	58175	AWARDS	200	200	-	0%	191	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	13,050	13,500	450	3%	10,369	-
	58350	MEMBERSHIP & RECRUITING EXP	500	500	-	0%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	1,200	1,200	-	0%	-	-
	58400	PER MEMBER CHARGE	3,183	3,234	52	2%	4,357	4,299
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,154	1,084	(70)	-6%	-	1,452
		TOTAL PER MEMBER CHARGE	**4,337**	**4,319**	**(18)**	**0%**	**4,357**	**5,751**
	58450	RECEPTION/FORUM EXPENSE	1,200	1,200	-	0%	2,700	185
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	5,000	-	0%	-	-
	58620	MINI-CLE EXPENSE	1,100	1,100	-	0%	2,324	244
	TOTAL DIRECT EXPENSES		**26,587**	**27,019**	**432**	**2%**	**19,941**	**6,180**
	NET INCOME (LOSS):		**(10,787)**	**(11,331)**	**(544)**	**5%**	**(532)**	**8,786**
	NEW FUND BALANCE:		**36,931**	**25,600**	**(11,331)**	**-31%**	**47,717**	**56,504**

Washington State Bar Association
Section Budget Comparison

			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
SANIM	**ANIMAL LAW SECTION**							
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		639	-
	41805	MINI-CLE REVENUE	250	250	-	0%	-	-
	48200	SECTION DUES REVENUE	1,481	1,406	(75)	-5%	1,914	1,850
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	494	494	-	0%	-	638
		TOTAL SECTION DUES REVENUE	**1,975**	**1,900**	**(75)**	**-4%**	**1,914**	**2,488**
	TOTAL REVENUE		**2,225**	**2,150**	**(75)**	**-3%**	**2,553**	**2,488**
DIRECT EXPENSES:								
	58300	EXECUTIVE COMMITTEE EXPENSES	570	570	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	960	960	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	10	10	-	0%	-	-
	58400	PER MEMBER CHARGE	1,093	1,055	(38)	-4%	1,418	1,365
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	365	364	(0)	0%	-	473
		TOTAL PER MEMBER CHARGE	**1,458**	**1,419**	**(39)**	**-3%**	**1,418**	**1,838**
	58620	MINI-CLE EXPENSE	390	390	-	0%	-	-
	TOTAL DIRECT EXPENSES		**3,388**	**3,349**	**(39)**	**-1%**	**1,418**	**1,838**
	NET INCOME (LOSS):		**(1,163)**	**(1,199)**	**(36)**	**3%**	**1,135**	**650**
	NEW FUND BALANCE:		**11,486**	**10,287**	**(1,199)**	**-10%**	**12,649**	**13,298**

Washington State Bar Association
Section Budget Comparison

SBUS	BUSINESS LAW SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		3,634	-
	41805	MINI-CLE REVENUE	1,900	675	(1,225)	-64%	-	-
	41850	SEMINAR SPLITS W/ CLE	250	4,000	3,750	1500%	1,380	-
	48200	SECTION DUES REVENUE	22,125	30,975	8,850	40%	29,312	28,518
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	7,692	7,454	(238)	-3%	-	9,771
		TOTAL SECTION DUES REVENUE	**29,817**	**38,429**	**8,612**	**29%**	**29,312**	**38,289**
	TOTAL REVENUE		**31,967**	**43,104**	**11,137**	**35%**	**34,326**	**38,289**
DIRECT EXPENSES:								
	58125	ANNUAL OR OTHER MEETING EXPENS	-	1,500	1,500		268	-
	58300	EXECUTIVE COMMITTEE EXPENSES	20,000	10,000	(10,000)	-50%	-	9,048
	58325	LDSHIP/PROF DEVELOP/RETREATS	900	900	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	1,000	5,000	4,000	400%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	1,000	1,000	-	0%	320	-
	58400	PER MEMBER CHARGE	16,328	16,594	266	2%	21,710	21,051
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	5,681	5,502	(178)	-3%	-	7,237
		TOTAL PER MEMBER CHARGE	**22,009**	**22,096**	**87**		**21,710**	**28,288**
	58500	NEW LAWYER OUTREACH	1,500	1,000	(500)	-33%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	5,000	-	0%	-	-
	58550	SECTION COMMITTEE EXPENSE	2,000	1,000	(1,000)	-50%	-	771
	58615	LAW SCHOOL OUTREACH	500	1,000	500	100%	5,000	381
	58620	MINI-CLE EXPENSE	6,000	2,000	(4,000)	-67%	224	448
	58625	SEMINAR EXPENSE - SECTIONS	5,000	5,000	-	0%	-	-
	TOTAL DIRECT EXPENSES		**64,909**	**56,996**	**(7,913)**	**-12%**	**27,522**	**38,936**
	NET INCOME (LOSS):		**(32,942)**	**(13,892)**	**19,050**	**-58%**	**6,804**	**(647)**
	NEW FUND BALANCE:		**39,141**	**25,249**	**(13,892)**	**-70%**	**72,083**	**71,436**

Washington State Bar Association
Section Budget Comparison

			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
SLCP	**LIQUOR, CANNABIS, AND PSYCHEDELICS SECTION**							
REVENUE:								
	41805	MINI-CLE REVENUE	800	800	-	0%	-	-
	48200	SECTION DUES REVENUE	1,406	1,406	-	0%	-	1,675
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	508	479	(29)	-6%	-	562
		TOTAL SECTION DUES REVENUE	**1,914**	**1,885**	**(29)**	**-6%**	**-**	**2,237**
	TOTAL REVENUE		**2,714**	**2,685**	**(29)**	**-1%**	**-**	**2,237**
DIRECT EXPENSES:								
	58300	EXECUTIVE COMMITTEE EXPENSES	700	700	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	100	100	-	0%	-	-
	58400	PER MEMBER CHARGE	1,038	1,055	17	2%	-	1,236
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	376	353	(22)	-6%	-	416
		TOTAL PER MEMBER CHARGE	**1,414**	**1,408**	**(5)**	**-4%**	**-**	**1,652**
	58620	MINI-CLE EXPENSE	200	200	-	0%	-	-
	TOTAL DIRECT EXPENSES		**2,414**	**2,408**	**(5)**	**0%**	**-**	**1,652**
	NET INCOME (LOSS):		**300**	**277**	**(24)**	**-8%**	**-**	**585**
	NEW FUND BALANCE:		**6,725**	**7,001**	**277**	**4%**	**5,861**	**7,010**

Washington State Bar Association
Section Budget Comparison

SCD	CREDITOR DEBTOR RIGHTS SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		2,614	-
	41850	SEMINAR SPLITS W/ CLE	1,250	1,500	(1,250)	-100%	1,444	-
	48200	SECTION DUES REVENUE	11,944	10,500	(11,944)	-100%	14,648	14,000
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	3,970	3,979	(3,970)	-100%	-	4,883
		TOTAL SECTION DUES REVENUE	**15,914**	**14,479**	**(15,914)**		**14,648**	**18,883**
	TOTAL REVENUE		**17,164**	**15,979**	**10,814**	**63%**	**18,706**	**18,883**
DIRECT EXPENSES:								
	58175	AWARDS	350	350	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	1,000	1,000	-	0%	366	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	300	300	-	0%	-	-
	58400	PER MEMBER CHARGE	6,296	5,625	(671)	-11%	7,825	7,380
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	2,094	2,098	3	0%	-	2,608
		TOTAL PER MEMBER CHARGE	**8,390**	**7,723**	**(668)**		**7,825**	**9,988**
	58525	SCHOLARSHIPS/DONATIONS/GRANT	10,000	10,000	-	0%	5,000	5,000
	58625	SEMINAR EXPENSE - SECTIONS	2,000	2,000	-	0%	-	-
	TOTAL DIRECT EXPENSES		**22,040**	**21,373**	**(668)**	**-3%**	**13,191**	**14,988**
	NET INCOME (LOSS):		**(4,876)**	**(5,394)**	**(518)**	**11%**	**5,515**	**3,894**
	NEW FUND BALANCE:		**47,295**	**41,901**	**(5,394)**	**-11%**	**52,171**	**56,065**

Washington State Bar Association
Section Budget Comparison

SCON	CONSTRUCTION LAW SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		3,624	-
	41875	SEMINAR SPLITS W/ OTHERS	6,000	7,500	1,500	25%	8,990	-
	48200	SECTION DUES REVENUE	8,906	9,375	469	5%	11,900	11,725
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	3,069	2,994	(75)	-2%	-	3,967
		TOTAL SECTION DUES REVENUE	**11,975**	**12,369**	**394**	**3%**	**11,900**	**15,692**
	TOTAL REVENUE		**17,975**	**19,869**	**1,894**	**11%**	**24,514**	**15,692**
DIRECT EXPENSES:								
	58175	AWARDS	500	1,000	500	100%	270	166
	58300	EXECUTIVE COMMITTEE EXPENSES	1,000	1,500	500	50%	180	513
	58315	HONORARIUM	500	500	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	2,500	1,500	(1,000)	-40%	729	-
	58350	MEMBERSHIP & RECRUITING EXP	500	500	-	0%	-	46
	58375	NEWSLETTER/PUBLICATION EXPENSE	800	1,500	700	88%	638	468
	58400	PER MEMBER CHARGE	6,573	7,031	458	7%	8,821	8,653
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	2,266	2,210	(56)	-2%	-	2,940
		TOTAL PER MEMBER CHARGE	**8,839**	**9,241**	**402**	**4%**	**8,821**	**11,593**
	58450	RECEPTION/FORUM EXPENSE	8,000	10,000	2,000	25%	2,194	1,479
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	5,000	-	0%	-	-
	58600	SECTION SPECIAL PROJECTS	1,000	1,000	-	0%	-	-
	58620	MINI-CLE EXPENSE	1,800	1,000	(800)	-44%	-	-
	58625	SEMINAR EXPENSE - SECTIONS	1,000	1,500	500	50%	-	-
	TOTAL DIRECT EXPENSES		**31,439**	**35,241**	**3,802**	**12%**	**12,832**	**14,264**
	NET INCOME (LOSS):		**(13,464)**	**(15,372)**	**(1,908)**	**14%**	**11,682**	**1,427**
	NEW FUND BALANCE:		**60,871**	**45,499**	**(15,372)**	**-25%**	**74,335**	**75,762**

Washington State Bar Association
Section Budget Comparison

SCRIM	CRIMINAL LAW SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		5,650	-
	41850	SEMINAR SPLITS W/ CLE	850	6,500	5,650	665%	3,295	-
	48200	SECTION DUES REVENUE	8,258	7,673	(585)	-7%	10,279	9,720
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	2,753	2,753	-	0%	-	3,426
		TOTAL SECTION DUES REVENUE	**11,010**	**10,425**	**(585)**	**-7%**	**10,279**	**13,146**
	TOTAL REVENUE		**11,860**	**16,925**	**5,065**	**43%**	**19,224**	**13,146**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	160	160	-	0%	176	-
	58125	ANNUAL OR OTHER MEETING EXPENS	1,500	1,500	-	0%	-	1,792
	58300	EXECUTIVE COMMITTEE EXPENSES	1,500	1,500	-	0%	587	744
	58305	EXECUTIVE COMM EXP - OTHER	1,000	1,000	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	4,000	4,000	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	1,000	1,000	-	0%	-	-
	58400	PER MEMBER CHARGE	5,078	4,795	(283)	-6%	6,354	5,978
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,694	1,693	(1)	0%	-	2,118
		TOTAL PER MEMBER CHARGE	**6,772**	**6,488**	**(284)**	**-6%**	**6,354**	**8,096**
	58450	RECEPTION/FORUM EXPENSE	2,500	2,500	-	0%	-	-
	58500	NEW LAWYER OUTREACH	500	500	-	0%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	4,000	4,000	-	0%	-	-
	58615	LAW SCHOOL OUTREACH	1,500	1,500	-	0%	-	-
	58620	MINI-CLE EXPENSE	1,000	1,000	-	0%	-	-
	58625	SEMINAR EXPENSE - SECTIONS	7,500	7,500	-	0%	-	-
	58675	WEBSITE EXPENSES	500	500	-	0%	-	-
	TOTAL DIRECT EXPENSES		**33,432**	**33,148**	**(284)**	**-1%**	**7,117**	**10,632**
	NET INCOME (LOSS):		**(21,572)**	**(16,223)**	**5,349**	**-25%**	**12,107**	**2,514**
	NEW FUND BALANCE:		**91,271**	**75,048**	**(16,223)**	**-18%**	**112,843**	**115,358**

Washington State Bar Association
Section Budget Comparison

SCRL	CIVIL RIGHTS LAW SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		991	-
	41805	MINI-CLE REVENUE	1,020	1,020	-	0%	-	920
	41850	SEMINAR SPLITS W/ CLE	200	-	(200)	-100%	521	-
	48200	SECTION DUES REVENUE	3,375	3,600	225	7%	4,513	4,650
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,322	1,174	(148)	-11%	-	1,504
		TOTAL SECTION DUES REVENUE	**4,697**	**4,774**	**77**	**-5%**	**4,513**	**6,154**
	TOTAL REVENUE		**5,917**	**5,794**	**(123)**	**-2%**	**6,025**	**7,074**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	170	170	-	0%	-	-
	58175	AWARDS	610	610	-	0%	-	-
	58315	HONORARIUM	500	500	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	2,000	2,000	-	0%	-	-
	58400	PER MEMBER CHARGE	2,076	2,250	174	8%	2,783	2,860
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	814	722	(91)	-11%	-	928
		TOTAL PER MEMBER CHARGE	**2,889**	**2,972**	**83**	**-3%**	**2,783**	**3,787**
	58450	RECEPTION/FORUM EXPENSE	620	620	-	0%	-	-
	58615	LAW SCHOOL OUTREACH	210	210	-	0%	-	-
	58620	MINI-CLE EXPENSE	112	112	-	0%	-	336
	TOTAL DIRECT EXPENSES		**7,111**	**7,194**	**83**	**1%**	**2,783**	**4,123**
	NET INCOME (LOSS):		**(1,194)**	**(1,400)**	**(206)**	**17%**	**3,242**	**2,951**
	NEW FUND BALANCE:		**19,153**	**17,753**	**(1,400)**	**-7%**	**20,347**	**23,298**

Washington State Bar Association
Section Budget Comparison

SCORP	CORPORATE COUNSEL SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		3,829	-
	41805	MINI-CLE REVENUE	10,000	10,000	-	0%	8,445	-
	41850	SEMINAR SPLITS W/ CLE	3,000	750	(2,250)	-75%	2,031	-
	41875	SEMINAR SPLITS W/ OTHERS	4,000	4,000	-	0%	-	-
	48200	SECTION DUES REVENUE	15,750	14,400	(1,350)	-9%	19,919	19,100
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	6,000	5,438	(563)	-9%	-	6,640
		TOTAL SECTION DUES REVENUE	**21,750**	**19,838**	**(1,913)**	-18%	19,919	25,740
	TOTAL REVENUE		**38,750**	**34,588**	**(4,163)**	**-11%**	**34,224**	**25,740**
DIRECT EXPENSES:								
	58175	AWARDS	200	200	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	500	500	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	500	500	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	1,000	1,000	-	0%	-	-
	58400	PER MEMBER CHARGE	14,529	13,500	(1,029)	-7%	18,448	17,620
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	5,714	5,061	(653)	-11%	-	6,149
		TOTAL PER MEMBER CHARGE	**20,244**	**18,561**	**(1,683)**	**-19%**	**18,448**	**23,769**
	58450	RECEPTION EXPENSE	500	500	-	0%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	5,000	-	0%	-	-
	58620	MINI-CLE EXPENSE	10,000	10,000	-	0%	9,240	-
	58625	SEMINAR EXPENSE - SECTIONS	500	500	-	0%	2,500	-
	TOTAL DIRECT EXPENSES		**38,444**	**36,761**	**(1,683)**	**-4%**	**30,188**	**23,769**
	NET INCOME (LOSS):		**306**	**(2,173)**	**(2,480)**	**-809%**	**4,037**	**1,971**
	NEW FUND BALANCE:		**74,706**	**72,532**	**(2,173)**	**-3%**	**74,399**	**76,370**

Washington State Bar Association
Section Budget Comparison

SDR	DISPUTE RESOLUTION SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		2,385	-
	41700	CONFERENCES & INSTITUTES	3,738	2,793	(945)	-25%	3,739	-
	48200	SECTION DUES REVENUE	7,481	7,691	210	3%	9,991	10,010
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	2,791	2,568	(223)	-8%	-	3,330
		TOTAL SECTION DUES REVENUE	**10,273**	**10,259**	**(13)**	**-5%**	**9,991**	**13,340**
	TOTAL REVENUE		**14,011**	**13,052**	**(958)**	**-7%**	**16,114**	**13,340**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	110	110	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	950	950	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	6,500	6,500	-	0%	4,016	5,383
	58350	MEMBERSHIP & RECRUITING EXP	1,500	1,500	-	0%	-	-
	58400	PER MEMBER CHARGE	3,944	4,120	177	4%	5,290	5,277
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,472	1,354	(118)	-8%	-	1,763
		TOTAL PER MEMBER CHARGE	**5,416**	**5,474**	**58**	**-4%**	**5,290**	**7,040**
	58525	SCHOLARSHIPS/DONATIONS/GRANT	2,500	3,600	1,100	44%	-	1,461
	58600	SECTION SPECIAL PROJECTS	220	1,500	1,280	582%	-	-
	58620	MINI-CLE EXPENSE	2,000	660	(1,340)	-67%	112	112
	58625	SEMINAR EXPENSE - SECTIONS	3,500	5,000	1,500	43%	3,500	-
	58675	WEBSITE EXPENSES	250	250	-	0%	-	-
	TOTAL DIRECT EXPENSES		**22,946**	**25,544**	**2,598**	**11%**	**12,918**	**13,996**
	NET INCOME (LOSS):		**(8,936)**	**(12,492)**	**(3,556)**	**40%**	**3,196**	**(656)**
	NEW FUND BALANCE:		**37,739**	**25,247**	**(12,492)**	**-33%**	**46,674**	**46,019**

Washington State Bar Association
Section Budget Comparison

			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
SELD	**ELDER LAW SECTION**							
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		6,025	-
	41850	SEMINAR SPLITS W/ CLE	5,350	6,800	1,450	27%	11,641	-
	48200	SECTION DUES REVENUE	15,750	15,724	(26)	0%	21,251	20,825
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	5,263	5,253	(10)	0%	-	7,084
		TOTAL SECTION DUES REVENUE	**21,013**	**20,977**	**(36)**	**0%**	**21,251**	**27,909**
	TOTAL REVENUE		**26,363**	**27,777**	**1,414**	**5%**	**38,917**	**27,909**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	170	170	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	1,500	1,500	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	5,000	5,000	-	0%	-	-
	58326	LEGISLATIVE/LOBBYING	1,500	1,500	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	100	100	-	0%	-	-
	58400	PER MEMBER CHARGE	8,303	8,423	121	1%	11,249	10,978
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	2,777	2,770	(7)	0%	-	3,750
		TOTAL PER MEMBER CHARGE	**11,079**	**11,193**	**114**	**1%**	**11,249**	**14,727**
	58450	RECEPTION/FORUM EXPENSE	3,000	3,000	-	0%	39	22
	58525	SCHOLARSHIPS/DONATIONS/GRANT	15,000	15,000	-	0%	-	4,912
	58600	SECTION SPECIAL PROJECTS	2,500	2,500	-	0%	-	-
	58625	SEMINAR EXPENSE - SECTIONS	1,500	1,500	-	0%	750	-
	TOTAL DIRECT EXPENSES		**41,349**	**41,463**	**114**	**0%**	**12,037**	**19,661**
	NET INCOME (LOSS):		**(14,986)**	**(13,686)**	**1,300**	**-9%**	**26,880**	**8,247**
	NEW FUND BALANCE:		**112,337**	**98,651**	**(13,686)**	**-12%**	**127,323**	**135,570**

Washington State Bar Association
Section Budget Comparison

SELU	ENVIRONMENTAL & LAND USE LAW SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		3,660	-
	41805	MINI-CLE REVENUE	-	-	-		3,770	1,505
	41850	SEMINAR SPLITS W/ CLE	8,000	6,150	(1,850)	-23%	5,038	-
	48200	SECTION DUES REVENUE	21,750	22,500	750	3%	29,629	29,216
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	7,608	7,339	(268)	-4%	-	9,876
		TOTAL SECTION DUES REVENUE	**29,358**	**29,839**	**482**	**0%**	**29,629**	**39,092**
	TOTAL REVENUE		**37,358**	**35,989**	**(1,368)**	**-4%**	**42,098**	**40,597**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	175	175	-	0%	165	176
	58175	AWARDS	1,000	-	(1,000)	-100%	-	-
	58200	BREAKFAST/LUNCH/DINNER MTG EXP	500	-	(500)	-100%	82	-
	58300	EXECUTIVE COMMITTEE EXPENSES	9,500	9,500	-	0%	8,051	3,860
	58305	EXECUTIVE COMM EXP - OTHER	500	-	(500)	-100%	-	-
	58400	PER MEMBER CHARGE	10,032	10,547	515	5%	13,732	13,505
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	3,462	3,373	(88)	-3%	-	4,577
		TOTAL PER MEMBER CHARGE	**13,494**	**13,920**	**426**	**3%**	**13,732**	**18,083**
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	5,000	-	0%	7,222	-
	58615	LAW SCHOOL OUTREACH	2,000	2,200	200	10%	1,463	1,188
	58620	MINI-CLE EXPENSE	500	500	-	0%	236	224
	58625	SEMINAR EXPENSE - SECTIONS	1,500	1,500	-	0%	-	-
	58675	WEBSITE EXPENSES	130	130	-	0%	126	126
	58750	SEMINAR SCHOLARSHIPS	2,000	2,000	-	0%	778	1,340
	TOTAL DIRECT EXPENSES		**36,299**	**34,925**	**(1,374)**	**-4%**	**31,856**	**24,996**
	NET INCOME (LOSS):		**1,059**	**1,064**	**5**	**1%**	**10,242**	**15,601**
	NEW FUND BALANCE:		**75,366**	**76,430**	**1,064**	**1%**	**74,307**	**89,908**

Washington State Bar Association
Section Budget Comparison

SFAM	FAMILY LAW SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		11,954	-
	41850	SEMINAR SPLITS W/ CLE	36,700	23,900	(12,800)	-35%	37,082	-
	48200	SECTION DUES REVENUE	26,171	26,250	79	0%	35,096	34,178
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	8,538	8,677	139	2%	-	11,699
		TOTAL SECTION DUES REVENUE	**34,709**	**34,927**	**218**	**2%**	**35,096**	**45,877**
	TOTAL REVENUE		**71,409**	**58,827**	**(12,582)**	**-18%**	**84,132**	**45,877**
DIRECT EXPENSES:								
	58125	ANNUAL OR OTHER MEETING EXPENS	1,500	8,000	6,500	433%	-	-
	58150	ATTENDANCE AT BOG MEETINGS	2,000	2,000	-	0%	-	754
	58175	AWARDS	1,500	2,000	500	33%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	2,000	2,000	-	0%	873	-
	58305	EXECUTIVE COMM EXP - OTHER	16,000	37,000	21,000	131%	17,436	24,135
	58350	MEMBERSHIP & RECRUITING EXP	10,000	10,000	-	0%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	5,000	5,000	-	0%	429	304
	58400	PER MEMBER CHARGE	13,796	14,063	267	2%	18,346	18,026
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	4,504	4,575	71	2%	-	6,115
		TOTAL PER MEMBER CHARGE	**18,300**	**18,637**	**338**	**4%**	**18,346**	**24,141**
	58450	RECEPTION/FORUM EXPENSE	1,000	1,000	-	0%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	30,000	30,000	-	0%	1,150	5,000
	58620	MINI-CLE EXPENSE	3,000	3,000	-	0%	-	-
	58625	SEMINAR EXPENSE - SECTIONS	5,000	5,000	-	0%	500	2,720
	TOTAL DIRECT EXPENSES		**95,300**	**123,637**	**28,338**	**30%**	**38,734**	**57,054**
	NET INCOME (LOSS):		**(23,890)**	**(64,810)**	**(40,920)**	**171%**	**45,398**	**(11,177)**
	NEW FUND BALANCE:		**224,757**	**159,947**	**(64,810)**	**-29%**	**248,648**	**237,471**

Washington State Bar Association
Section Budget Comparison

SHEA	HEALTH LAW SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		3,952	-
	41805	MINI-CLE REVENUE	-	500	500		490	660
	41850	SEMINAR SPLITS W/ CLE	500	-	(500)	-100%	1,610	-
	48200	SECTION DUES REVENUE	5,700	9,000	3,300	58%	7,724	7,580
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,945	1,911	(34)	-2%	-	2,575
		TOTAL SECTION DUES REVENUE	**7,645**	**10,911**	**3,266**	**56%**	**7,724**	**10,155**
	TOTAL REVENUE		**8,145**	**11,411**	**3,266**	**40%**	**13,775**	**10,815**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	-	-	-		4	-
	58300	EXECUTIVE COMMITTEE EXPENSES	5,000	5,000	-	0%	-	5,076
	58305	EXECUTIVE COMM EXP - OTHER	1,000	1,000	-	0%	374	699
	58315	HONORARIUM	3,000	3,000	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	4,000	10,000	6,000	150%	396	-
	58350	MEMBERSHIP & RECRUITING EXP	6,000	5,000	(1,000)	-17%	3,639	-
	58400	PER MEMBER CHARGE	5,258	5,625	367	7%	7,101	6,993
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,795	1,763	(32)	-2%	-	2,367
		TOTAL PER MEMBER CHARGE	**7,054**	**7,388**	**335**	**5%**	**7,101**	**9,360**
	58525	SCHOLARSHIPS/DONATIONS/GRANT	3,500	2,400	(1,100)	-31%	1,900	-
	58615	LAW SCHOOL OUTREACH	5,000	5,000	-	0%	-	2,050
	58620	MINI-CLE EXPENSE	1,500	400	(1,100)	-73%	112	172
	58625	SEMINAR EXPENSE - SECTIONS	5,000	5,000	-	0%	417	32
	58750	SEMINAR SCHOLARSHIPS	2,500	1,000	(1,500)	-60%	-	-
	TOTAL DIRECT EXPENSES		**43,554**	**45,688**	**2,135**	**5%**	**13,942**	**17,389**
	NET INCOME (LOSS):		**(35,409)**	**(34,277)**	**1,132**	**35%**	**(167)**	**(6,574)**
	NEW FUND BALANCE:		**39,205**	**4,928**	**(34,277)**	**40%**	**74,614**	**68,040**

Washington State Bar Association
Section Budget Comparison

SIND	INDIAN LAW SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	200	-	(200)	-100%	4,593	-
	41850	SEMINAR SPLITS W/ CLE	-	2,000	2,000		757	-
	41875	SEMINAR SPLITS W/ OTHERS	10,000	10,000	-	0%	23,241	-
	48200	SECTION DUES REVENUE	7,425	7,875	450	6%	9,904	10,590
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	2,400	2,456	56	2%	-	3,301
		TOTAL SECTION DUES REVENUE	**9,825**	**10,331**	**506**	**8%**	**9,904**	**13,891**
	TOTAL REVENUE		**20,025**	**22,331**	**2,306**	**12%**	**38,494**	**13,891**
DIRECT EXPENSES:								
	58300	EXECUTIVE COMMITTEE EXPENSES	400	400	-	0%	-	-
	58315	HONORARIUM	600	600	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	1,000	1,000	-	0%	-	549
	58400	PER MEMBER CHARGE	4,566	4,922	355	8%	6,117	6,513
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,477	1,511	34	2%	-	2,039
		TOTAL PER MEMBER CHARGE	**6,043**	**6,433**	**389**	**10%**	**6,117**	**8,552**
	58450	RECEPTION EXPENSE	4,000	4,000	-	0%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	60,000	30,000	(30,000)	-50%	13,500	40,000
	TOTAL DIRECT EXPENSES		**72,043**	**46,433**	**(25,611)**	**-36%**	**19,617**	**49,887**
	NET INCOME (LOSS):		**(52,018)**	**(24,101)**	**27,917**	**-54%**	**18,876**	**(35,996)**
	NEW FUND BALANCE:		**44,228**	**20,127**	**(24,101)**	**-54%**	**96,246**	**60,251**

Washington State Bar Association
Section Budget Comparison

			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
SINTL	**INTERNATIONAL PRACTICE SECTION**							
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		2,305	-
	41450	SPONSORSHIPS	2,000	-	(2,000)	-100%	-	-
	41805	MINI-CLE REVENUE	1,500	-	(1,500)	-100%	140	490
	48200	SECTION DUES REVENUE	5,906	5,250	(656)	-11%	8,062	7,543
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	2,102	2,002	(100)	-5%	-	2,687
		TOTAL SECTION DUES REVENUE	**8,008**	**7,252**	**(756)**	**-16%**	**8,062**	**10,231**
	TOTAL REVENUE		**11,508**	**7,252**	**(4,256)**	**-37%**	**10,506**	**10,721**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	200	-	(200)	-100%	-	-
	58125	ANNUAL OR OTHER MEETING EXPENS	5,000	3,000	(2,000)	-40%	2,061	-
	58300	EXECUTIVE COMMITTEE EXPENSES	1,000	1,000	-	0%	404	-
	58400	PER MEMBER CHARGE	3,113	2,813	(301)	-10%	4,227	3,985
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,109	1,056	(53)	-5%	-	1,409
		TOTAL PER MEMBER CHARGE	**4,222**	**3,868**	**(354)**	**(0)**	**4,227**	**5,394**
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	5,000	-	0%	1,800	-
	58620	MINI-CLE EXPENSE	1,344	1,344	-	0%	460	224
	TOTAL DIRECT EXPENSES		**16,766**	**14,212**	**(2,554)**	**-15%**	**8,952**	**5,618**
	NET INCOME (LOSS):		**(5,258)**	**(6,960)**	**(1,702)**	**32%**	**1,554**	**5,103**
	NEW FUND BALANCE:		**39,081**	**32,121**	**(6,960)**	**-18%**	**44,339**	**49,441**

Washington State Bar Association
Section Budget Comparison

SIP	INTELLECTUAL PROPERTY LAW SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	1,000	-	(1,000)	-100%	5,537	-
	41805	MINI-CLE REVENUE	700	700	-	0%	140	700
	41850	SEMINAR SPLITS W/ CLE	5,150	6,600	1,450	28%	1,326	-
	48200	SECTION DUES REVENUE	15,188	14,063	(1,125)	-7%	19,842	18,818
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	5,133	5,080	(53)	-1%	-	6,614
		TOTAL SECTION DUES REVENUE	**20,320**	**19,143**	**(1,178)**	**-8%**	**19,842**	**25,433**
	TOTAL REVENUE		**27,170**	**26,443**	**(728)**	**-3%**	**26,846**	**26,133**
DIRECT EXPENSES:								
	58175	AWARDS	100	100	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	500	500	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	500	500	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	800	800	-	0%	-	-
	58400	PER MEMBER CHARGE	11,208	10,547	(662)	-6%	14,702	13,893
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	3,788	3,749	(39)	-1%	-	4,901
		TOTAL PER MEMBER CHARGE	**14,997**	**14,296**	**(701)**	**-7%**	**14,702**	**18,794**
	58450	RECEPTION/FORUM EXPENSE	8,000	8,000	-	0%	6,167	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	15,000	15,000	-	0%	15,000	10,000
	58600	SECTION SPECIAL PROJECTS	2,000	2,000	-	0%	-	-
	58615	LAW SCHOOL OUTREACH	5,000	5,000	-	0%	-	-
	58620	MINI-CLE EXPENSE	1,500	1,500	-	0%	62	112
	58625	SEMINAR EXPENSE - SECTIONS	12,000	12,000	-	0%	1,885	-
	TOTAL DIRECT EXPENSES		**60,397**	**59,696**	**(701)**	**-1%**	**37,816**	**28,906**
	NET INCOME (LOSS):		**(33,226)**	**(33,253)**	**(27)**	**0%**	**(10,971)**	**(2,773)**
	NEW FUND BALANCE:		**65,955**	**32,701**	**(33,253)**	**-50%**	**99,181**	**96,408**

Washington State Bar Association
Section Budget Comparison

			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
SJUV	**JUVENILE LAW SECTION**							
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		869	-
	41805	MINI-CLE REVENUE	500	525	25	5%	490	4,795
	48200	SECTION DUES REVENUE	3,413	4,253	840	25%	4,726	7,035
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,175	1,147	(28)	-2%	-	1,575
		TOTAL SECTION DUES REVENUE	**4,587**	**5,399**	**812**	**22%**	**4,726**	**8,610**
	TOTAL REVENUE		**5,087**	**5,924**	**837**	**16%**	**6,085**	**13,405**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	165	165	-	0%	164	-
	58300	EXECUTIVE COMMITTEE EXPENSES	250	125	(125)	-50%	-	-
	58315	HONORARIUM	3,000	900	(2,100)	-70%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	2,000	2,000	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	100	1,500	1,400	1400%	-	1,092
	58400	PER MEMBER CHARGE	1,799	2,278	479	27%	2,503	3,708
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	619	605	(15)	-2%	-	834
		TOTAL PER MEMBER CHARGE	**2,418**	**2,883**	**464**	**24%**	**2,503**	**4,543**
	58525	SCHOLARSHIPS/DONATIONS/GRANT	2,500	2,500	-	0%	600	-
	58620	MINI-CLE EXPENSE	500	1,000	500	100%	336	136
	TOTAL DIRECT EXPENSES		**10,933**	**11,073**	**139**	**1%**	**3,603**	**5,771**
	NET INCOME (LOSS):		**(5,846)**	**(5,148)**	**698**	**-12%**	**2,483**	**7,634**
	NEW FUND BALANCE:		**11,822**	**6,674**	**(5,148)**	**-44%**	**17,668**	**25,303**

Washington State Bar Association
Section Budget Comparison

			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
SLAMP	**LEGAL ASSISTANCE TO MILITARY PERSONNEL SECTION**							
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		1,123	-
	41805	MINI-CLE REVENUE	320	320	-	0%	264	-
	48200	SECTION DUES REVENUE	1,969	1,969	-	0%	2,365	2,065
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	667	659	(8)	-1%	-	788
		TOTAL SECTION DUES REVENUE	**2,636**	**2,628**	**(8)**	**-1%**	**2,365**	**2,853**
	TOTAL REVENUE		**2,956**	**2,948**	**(8)**	**0%**	**3,752**	**2,853**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	10	10	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	70	70	-	0%	-	777
	58400	PER MEMBER CHARGE	1,038	1,055	17	2%	1,250	1,089
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	352	347	(4)	-1%	-	417
		TOTAL PER MEMBER CHARGE	**1,390**	**1,402**	**13**	**0%**	**1,250**	**1,505**
	58525	SCHOLARSHIPS/DONATIONS/GRANT	-	-	-		5,000	-
	58620	MINI-CLE EXPENSE	310	310	-	0%	112	-
	TOTAL DIRECT EXPENSES		**1,780**	**1,792**	**13**	**1%**	**6,362**	**2,282**
	NET INCOME (LOSS):		**1,176**	**1,156**	**(21)**	**-2%**	**(2,610)**	**572**
	NEW FUND BALANCE:		**21,094**	**22,250**	**(21)**	**0%**	**19,918**	**20,490**

Washington State Bar Association
Section Budget Comparison

SLB	LOW BONO SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		1,184	-
	41805	MINI-CLE REVENUE	2,660	7,000	4,340	163%	5,110	4,280
	48200	SECTION DUES REVENUE	1,688	1,800	113	7%	2,401	2,880
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	572	565	(7)	-1%	-	800
		TOTAL SECTION DUES REVENUE	**2,259**	**2,365**	**105**	**5%**	**2,401**	**3,680**
	TOTAL REVENUE		**4,919**	**9,365**	**4,445**	**90%**	**8,695**	**7,960**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	177	-	(177)	-100%	-	-
	58125	ANNUAL OR OTHER MEETING EXPENS	1,000	2,000	1,000	100%	-	-
	58150	ATTENDANCE AT BOG MEETINGS	100	100	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	200	200	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	1,000	3,000	2,000	200%	-	1,229
	58350	MEMBERSHIP & RECRUITING EXP	500	500	-	0%	-	-
	58400	PER MEMBER CHARGE	1,038	1,125	87	8%	1,485	1,771
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	352	347	(4)	-1%	-	495
		TOTAL PER MEMBER CHARGE	**1,390**	**1,472**	**83**	**7%**	**1,485**	**2,266**
	58500	NEW LAWYER OUTREACH	200	200	-	0%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	200	100	(100)	-50%	-	-
	58600	SECTION SPECIAL PROJECTS	100	200	100	100%	-	-
	58620	MINI-CLE EXPENSE	200	1,500	1,300	650%	448	448
	TOTAL DIRECT EXPENSES		**5,067**	**9,272**	**4,206**	**83%**	**1,933**	**3,943**
	NET INCOME (LOSS):		**(147)**	**92**	**240**	**-163%**	**6,762**	**4,018**
	NEW FUND BALANCE:		**25,613**	**25,705**	**92**	**0%**	**25,760**	**29,778**

Washington State Bar Association
Section Budget Comparison

			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
SLE	**LABOR & EMPLOYMENT LAW SECTION**							
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		6,165	-
	41805	MINI-CLE REVENUE	300	300	-	0%	600	-
	41850	SEMINAR SPLITS W/ CLE	20,250	19,250	(1,000)	-5%	14,523	-
	48200	SECTION DUES REVENUE	21,713	25,331	3,619	17%	29,180	29,430
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	7,350	7,266	(84)	-1%	-	9,727
		TOTAL SECTION DUES REVENUE	**29,063**	**32,597**	**3,534**	**16%**	**29,180**	**39,157**
	TOTAL REVENUE		**49,613**	**52,147**	**2,534**	**5%**	**50,467**	**39,157**
DIRECT EXPENSES:								
	50070	PRINTING & COPYING	200	200	-	0%	-	-
	50165	CONFERENCE CALLS	170	170	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	2,000	2,000	-	0%	221	-
	58315	HONORARIUM	1,000	1,000	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	10,000	10,000	-	0%	12,114	3,611
	58400	PER MEMBER CHARGE	13,353	13,570	217	2%	18,019	18,099
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	4,523	4,469	(54)	-1%	-	6,006
		TOTAL PER MEMBER CHARGE	**17,877**	**18,039**	**163**	**0%**	**18,019**	**24,106**
	58525	SCHOLARSHIPS/DONATIONS/GRANT	22,500	22,500	-	0%	15,000	7,500
	58615	LAW SCHOOL OUTREACH	1,000	1,000	-	0%	1,011	-
	58620	MINI-CLE EXPENSE	11,000	11,000	-	0%	1,725	-
	58625	SEMINAR EXPENSE - SECTIONS	3,000	3,000	-	0%	1,466	3,961
	TOTAL DIRECT EXPENSES		**68,747**	**68,909**	**163**	**0%**	**49,556**	**39,178**
	NET INCOME (LOSS):		**(19,134)**	**(16,763)**	**2,371**	**-12%**	**912**	**(21)**
	NEW FUND BALANCE:		**97,844**	**81,082**	**(16,763)**	**-17%**	**116,978**	**116,957**

Washington State Bar Association
Section Budget Comparison

SLGBT	LGBT LAW SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	102	-	(102)	-100%	771	-
	41805	MINI-CLE REVENUE	200	200	-	0%	-	1,250
	48200	SECTION DUES REVENUE	2,475	2,700	225	9%	3,331	3,648
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	825	825	-	0%	-	1,110
		TOTAL SECTION DUES REVENUE	**3,300**	**3,525**	**225**	**9%**	**3,331**	**4,759**
	TOTAL REVENUE		**3,602**	**3,725**	**123**	**3%**	**4,102**	**6,009**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	150	150	-	0%	-	-
	58125	ANNUAL OR OTHER MEETING EXPENS	200	200	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	200	200	-	0%	-	-
	58315	HONORARIUM	500	500	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	2,000	2,000	-	0%	-	500
	58400	PER MEMBER CHARGE	1,545	1,688	142	9%	2,059	2,251
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	508	513	5	1%	-	686
		TOTAL PER MEMBER CHARGE	**2,053**	**2,201**	**148**	**10%**	**2,059**	**2,937**
	58525	SCHOLARSHIPS/DONATIONS/GRANT	500	500	-	0%	-	-
	58615	LAW SCHOOL OUTREACH	500	500	-	0%	-	18
	58620	MINI-CLE EXPENSE	1,500	1,500	-	0%	-	12
	58750	SEMINAR SCHOLARSHIPS	500	500	-	0%	-	-
	TOTAL DIRECT EXPENSES		**8,103**	**8,251**	**148**	**2%**	**2,059**	**3,468**
	NET INCOME (LOSS):		**(4,501)**	**(4,526)**	**(25)**	**1%**	**2,043**	**2,541**
	NEW FUND BALANCE:		**11,095**	**6,569**	**(4,526)**	**-41%**	**15,596**	**18,137**

Washington State Bar Association
Section Budget Comparison

SLIT	LITIGATION SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		7,231	-
	41850	SEMINAR SPLITS W/ CLE	5,000	4,000	(1,000)	-20%	1,096	-
	48200	SECTION DUES REVENUE	21,713	21,848	135	1%	29,163	28,740
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	7,316	7,257	(59)	-1%	-	9,721
		TOTAL SECTION DUES REVENUE	**29,029**	**29,105**	**76**	**0%**	**29,163**	**38,461**
	TOTAL REVENUE		**34,029**	**33,105**	**(924)**	**-3%**	**37,489**	**38,461**
DIRECT EXPENSES:								
	58200	BREAKFAST/LUNCH/DINNER MTG EXP	3,500	1,500	(2,000)	-57%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	9,500	9,500	-	0%	8,126	-
	58350	MEMBERSHIP & RECRUITING EXP	750	-	(750)	-100%	-	-
	58400	PER MEMBER CHARGE	13,353	13,655	301	2%	18,008	17,675
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	4,499	4,463	(36)	-1%	-	6,003
		TOTAL PER MEMBER CHARGE	**17,853**	**18,118**	**265**	**1%**	**18,008**	**23,678**
	58500	NEW LAWYER OUTREACH	500	-	(500)	-100%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	6,000	9,000	3,000	50%	6,000	6,000
	58615	LAW SCHOOL OUTREACH	700	-	(700)	-100%	-	-
	58620	MINI-CLE EXPENSE	-	-	-		-	112
	58625	SEMINAR EXPENSE - SECTIONS	500	1,500	1,000	200%	-	-
	TOTAL DIRECT EXPENSES		**39,303**	**41,618**	**2,315**	**6%**	**32,135**	**29,790**
	NET INCOME (LOSS):		**(5,274)**	**(8,513)**	**(3,239)**	**61%**	**5,355**	**8,671**
	NEW FUND BALANCE:		**134,075**	**125,562**	**(8,513)**	**-6%**	**139,349**	**148,020**

Washington State Bar Association
Section Budget Comparison

SRPPT		REAL PROPERTY, PROBATE & TRUST SECTION	FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		14,121	-
	41850	SEMINAR SPLITS W/ CLE	53,200	52,750	(450)	-1%	50,716	-
	48200	SECTION DUES REVENUE	42,188	42,188	-	0%	55,059	53,718
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	13,881	14,017	136	1%	-	18,353
		TOTAL SECTION DUES REVENUE	**56,069**	**56,205**	**136**	**1%**	**55,059**	**72,071**
	TOTAL REVENUE		**109,269**	**108,955**	**(314)**	**0%**	**119,896**	**72,071**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	200	200	-	0%	165	-
	58300	EXECUTIVE COMMITTEE EXPENSES	10,000	10,000	-	0%	2,259	2,902
	58305	EXECUTIVE COMM EXP - OTHER	40,000	35,000	(5,000)	-13%	32,217	3,495
	58325	LDSHIP/PROF DEVELOP/RETREATS	30,000	40,000	10,000	33%	18,806	35,314
	58326	LEGISLATIVE/LOBBYING	500	1,000	500	100%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	2,000	3,500	1,500	75%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	2,000	2,000	-	0%	2,134	1,636
	58400	PER MEMBER CHARGE	31,134	31,641	506	2%	40,804	39,649
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	10,248	10,346	97	1%	-	13,601
		TOTAL PER MEMBER CHARGE	**41,383**	**41,986**	**604**	**3%**	**40,804**	**53,250**
	58500	NEW LAWYER OUTREACH	2,000	3,000	1,000	50%	120	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	5,000	7,000	2,000	40%	5,535	1,684
	58615	LAW SCHOOL OUTREACH	10,000	10,000	-	0%	155	-
	58625	SEMINAR EXPENSE - SECTIONS	20,000	20,000	-	0%	4,974	-
	58675	WEBSITE EXPENSES	2,500	5,000	2,500	100%	3,196	3,000
	TOTAL DIRECT EXPENSES		**165,583**	**178,686**	**13,104**	**8%**	**110,365**	**101,283**
	NET INCOME (LOSS):		**(56,314)**	**(69,732)**	**(13,418)**	**24%**	**9,531**	**(29,212)**
	NEW FUND BALANCE:		**215,357**	**145,625**	**(69,732)**	**-32%**	**271,671**	**242,459**

Washington State Bar Association
Section Budget Comparison

			-	-				
			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
SSEN	**SENIOR LAWYERS SECTION**							
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		661	-
	48200	SECTION DUES REVENUE	4,500	4,313	(188)	-4%	6,275	5,825
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,402	1,475	74	5%	-	2,092
		TOTAL SECTION DUES REVENUE	**5,902**	**5,788**	**(114)**	**1%**	**6,275**	**7,917**
	TOTAL REVENUE		**5,902**	**6,938**	**1,036**	**18%**	**6,936**	**7,917**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	150	150	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	230	230	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	610	610	-	0%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	4,500	4,500	-	0%	3,868	850
	58400	PER MEMBER CHARGE	3,321	3,234	(87)	-3%	4,659	4,299
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	1,035	1,089	54	5%	-	1,553
		TOTAL PER MEMBER CHARGE	**4,356**	**4,323**	**(33)**	**3%**	**4,659**	**5,852**
	TOTAL DIRECT EXPENSES		**9,846**	**9,813**	**(33)**	**0%**	**8,527**	**6,702**
	NET INCOME (LOSS):		**(3,945)**	**(2,876)**	**1,069**	**-27%**	**(1,590)**	**1,215**
	NEW FUND BALANCE:		**7,760**	**4,885**	**(2,876)**	**-37%**	**11,705**	**12,920**

Washington State Bar Association
Section Budget Comparison

SSSP	SOLO & SMALL PRACTICE SECTION		FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		5,705	-
	41805	MINI-CLE REVENUE	5,000	5,000	-	0%	3,430	6,125
	48200	SECTION DUES REVENUE	24,938	25,594	656	3%	29,899	31,920
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	7,875	8,203	328	4%	-	9,966
		TOTAL SECTION DUES REVENUE	**32,813**	**33,797**	**984**	**7%**	**29,899**	**41,886**
	TOTAL REVENUE		**37,813**	**38,797**	**984**	**3%**	**39,034**	**48,011**
DIRECT EXPENSES:								
	50165	CONFERENCE CALLS	200	200	-	0%	265	106
	58150	ATTENDANCE AT BOG MEETINGS	100	100	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	300	300	-	0%	-	-
	58325	LDSHIP/PROF DEVELOP/RETREATS	6,500	7,500	1,000	15%	7,349	5,303
	58350	MEMBERSHIP & RECRUITING EXP	8,000	8,000	-	0%	7,755	400
	58400	PER MEMBER CHARGE	13,146	13,711	565	4%	15,843	16,826
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	4,154	4,325	171	4%	-	5,281
		TOTAL PER MEMBER CHARGE	**17,300**	**18,036**	**736**	**8%**	**15,843**	**22,108**
	58525	SCHOLARSHIPS/DONATIONS/GRANT	-	5,000	5,000		-	-
	58600	SECTION SPECIAL PROJECTS	2,000	2,000	-	0%	-	-
	58620	MINI-CLE EXPENSE	3,000	3,000	-	0%	560	784
	58625	SEMINAR EXPENSE - SECTIONS	5,500	11,000	5,500	100%	12,997	-
	58675	WEBSITE EXPENSES	7,000	6,000	(1,000)	-14%	1,500	-
	58750	SEMINAR SCHOLARSHIPS	3,000	3,000	-	0%	2,898	-
	TOTAL DIRECT EXPENSES		**52,900**	**64,136**	**11,236**	**21%**	**49,168**	**28,701**
	NET INCOME (LOSS):		**(15,087)**	**(25,339)**	**(10,252)**	**68%**	**(10,134)**	**19,310**
	NEW FUND BALANCE:		**88,925**	**63,586**	**(25,339)**	**-28%**	**101,512**	**123,323**

Washington State Bar Association
Section Budget Comparison

			-	-				
			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
STAX	**TAXATION SECTION**							
REVENUE:								
	40500	INTEREST - INVESTMENTS	200	-	(200)	-100%	1,205	-
	41500	ANNUAL OR OTHER MEETING REV	5,575	4,700	(875)	-16%	4,710	-
	48200	SECTION DUES REVENUE	14,625	13,725	(900)	-6%	12,115	17,640
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	3,048	4,418	1,371	45%	-	4,038
		TOTAL SECTION DUES REVENUE	**17,673**	**18,143**	**471**	**39%**	**12,115**	**21,678**
	TOTAL REVENUE		**23,448**	**23,343**	**(104)**	**0%**	**18,030**	**21,678**
DIRECT EXPENSES:								
	58125	ANNUAL OR OTHER MEETING EXPENS	13,500	6,000	(7,500)	-56%	12,812	6,000
	58175	AWARDS	850	350	(500)	-59%	205	-
	58300	EXECUTIVE COMMITTEE EXPENSES	500	500	-	0%	-	-
	58375	NEWSLETTER/PUBLICATION EXPENSE	150	-	(150)	-100%	-	-
	58400	PER MEMBER CHARGE	8,994	8,578	(416)	-5%	11,224	10,849
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	2,812	2,952	139	5%	-	3,741
		TOTAL PER MEMBER CHARGE	**11,807**	**11,530**	**(277)**	**0**	**11,224**	**14,590**
	58450	RECEPTION/FORUM EXPENSE	1,500	1,000	(500)	-33%	847	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	4,500	2,500	(2,000)	-44%	2,589	-
	58620	MINI-CLE EXPENSE	500	500	-	0%	-	112
	58625	SEMINAR EXPENSE - SECTIONS	1,000	1,000	-	0%	-	-
	TOTAL DIRECT EXPENSES		**34,307**	**24,030**	**(10,277)**	**-30%**	**27,677**	**20,702**
	NET INCOME (LOSS):		**(10,859)**	**(687)**	**10,173**	**-94%**	**(9,647)**	**976**
	NEW FUND BALANCE:		**7,096**	**6,409**	**(687)**	**-10%**	**17,955**	**18,931**

Washington State Bar Association
Section Budget Comparison

			-	-				
			FY2025 Budget	FY2026 Budget	FY25 vs FY26 Comparison	% Change	FY2024 Actuals YTD	FY2025 Actuals YTD
SWP	**WORLD PEACE THROUGH LAW SECTION**							
REVENUE:								
	40500	INTEREST - INVESTMENTS	-	-	-		1,681	-
	41850	SEMINAR SPLITS W/ CLE	-	1,000	1,000		2,674	-
	48200	SECTION DUES REVENUE	2,213	1,875	(338)	-15%	3,053	2,650
	48225	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	875	772	(103)	-12%	-	1,018
		TOTAL SECTION DUES REVENUE	**3,087**	**2,647**	**(440)**	**-27%**	**3,053**	**3,668**
	TOTAL REVENUE		**3,087**	**3,647**	**560**	18%	**7,408**	**3,668**
DIRECT EXPENSES:								
	58175	AWARDS	500	500	-	0%	-	-
	58300	EXECUTIVE COMMITTEE EXPENSES	150	150	-	0%	-	-
	58350	MEMBERSHIP & RECRUITING EXP	1,000	1,000	-	0%	-	-
	58400	PER MEMBER CHARGE	1,633	1,406	(227)	-14%	2,133	1,956
	58415	FISCAL/MEMBERSHIP YEAR ADJUSTMENT	616	562	(54)	-9%	-	711
		TOTAL PER MEMBER CHARGE	**2,249**	**1,969**	**(281)**	**-23%**	**2,133**	**2,667**
	58450	RECEPTION/FORUM EXPENSE	500	500	-	0%	-	-
	58500	NEW LAWYER OUTREACH	520	520	-	0%	-	-
	58525	SCHOLARSHIPS/DONATIONS/GRANT	3,000	5,000	2,000	67%	(200)	-
	58600	SECTION SPECIAL PROJECTS	200	200	-	0%	-	-
	58615	LAW SCHOOL OUTREACH	100	100	-	0%	-	-
	58620	MINI-CLE EXPENSE	1,560	1,559	(1)	0%	1,864	112
	58625	SEMINAR EXPENSE - SECTIONS	1,500	1,500	-	0%	-	-
	TOTAL DIRECT EXPENSES		**11,279**	**13,402**	**2,122**	19%	**3,797**	**2,779**
	NET INCOME (LOSS):		**(8,192)**	**(9,755)**	**(1,563)**	**19%**	**3,611**	**889**
	NEW FUND BALANCE:		**24,916**	**15,162**	**(9,755)**	**-39%**	**33,108**	**33,997**

ATTACHMENT F

WASHINGTON STATE BAR ASSOCIATION

TO: WSBA President, President-elect, Board of Governors, Executive Director

FROM: Barbara Prowant, BLS Chair

SUBJECT: Request for Change in Section Member Dues in 2026

DATE: 05/12/2025

The Business Law Section Section requests your approval to change (increase

or decrease) our section member dues from $ $ 25.00 to $ $ 35.00 effective January 1, 2026.

The new amount has been included in our budget for the 2026 fiscal year which begins October 1, 2025.

Reason for request to change dues:
Increased costs and to be more in line with other WSBA Sections.

Updated 4.14.2025

ATTACHMENT G

WASHINGTON STATE BAR ASSOCIATION

TO: WSBA President, President-elect, Board of Governors, Executive Director

FROM: Elena Praggastis

SUBJECT: Request for Change in Section Member Dues in 2026

DATE: 05/20/2025

The Health Law Section Section requests your approval to change (increase

or decrease) our section member dues from $ $ 20.00 to $ $ 30.00 effective January 1, 2026.

The new amount has been included in our budget for the 2026 fiscal year which begins October 1, 2025.

Reason for request to change dues:

The Health Law Section respectfully requests to increase our section membership dues from $20 to $30, effective January 1, 2026.

The proposed increase reflects the rising costs of delivering high-quality member services, including educational programming, networking opportunities, and section publications.

Our goal is to ensure that we continue to provide meaningful value and support to our members while maintaining financial sustainability. The additional revenue will allow us to invest in enhanced member benefits.

We believe the $30 rate remains affordable and will help us continue to serve our members effectively and responsibly.

ATTACHMENT H

WASHINGTON STATE BAR ASSOCIATION

TO: WSBA President, President-elect, Board of Governors, Executive Director

FROM: Matthew Kelly, Treasurer (L&E Executive Committee)

SUBJECT: Request for Change in Section Member Dues in 2026

DATE: 07/21/2025

The Labor & Employment Section requests your approval to change (increase

or decrease) our section member dues from $ $ 30.00 to $ $ 35.00 effective January 1, 2026.

The new amount has been included in our budget for the 2026 fiscal year which begins October 1, 2025.

Reason for request to change dues:

The Section has not raised its section dues in several years.

Updated 4.14.2025

ATTACHMENT I

2026 WSBA BUDGET WORKSHEET
CAPITAL BUDGET

	COST CENTER	UNIT COST	QTY	AMOUNT	USEFUL LIFE (YRS)	ESTIMATED IN SERVICE DATE	ANNUAL DEPRECIATION EXPENSE	BUDGET FY 2026
Capital Hardware (General Indirects):								
Hardware replacements	INDIRECT	60,000	1	60,000	3	Jan-26	20,000	15,000
Copier	INDIRECT	25,000	1	25,000	3	Jan-26	5,000	5,000
Total				**85,000**			**25,000**	**20,000**
Equipment (General Indirects)								
Mail machine or refridgerator replacement	INDIRECT	10,000	1	10,000	10	Jan-26	1,042	1,042
Total				**10,000**			**1,042**	**1,042**
GRAND TOTAL				**95,000**			**26,042**	**21,042**

ATTACHMENT J

WSBA BUDGET GLOSSARY

Accrual Basis: The basis of accounting whereby revenues are recognized when earned and measurable regardless of when collected; and expenses are recorded when incurred.

Capital Asset: Washington State Bar Association (WSBA) fiscal policies identify this as an item that costs over $2,500 and has a useful life of over 1 year. Capital assets are depreciated over their identified useful life.

Capital Budget: The capital budget forecasts capital asset purchases and capital labor hours anticipated in the coming fiscal year. It reflects the total cash outlay for the organization to purchase or develop assets that are depreciated over the life of the asset. This is reflected in the annual budget as depreciation expense. The Board of Governors reviews and approves the final capital budget, with the entire WSBA budget, at its last meeting of the fiscal year (September).

Capital Labor: Work performed by WSBA employees to develop internally used software systems. Employee hours spent developing software is considered a capital asset and the cost of the labor is depreciated over the useful life of the asset.

Cash Basis: The basis for accounting whereby revenues are recorded only when received and expenses are recorded only when paid, without regard to the period in which they were earned or incurred.

Cost Center: A unit within WSBA that reflects a program or resource. WSBA's financial activities are reported by cost center, meaning both revenue and expenses are included under the financial report for each identified cost center. WSBA has a total of 72 cost centers (29 of which are individual Sections). For a description of WSBA's cost centers, see the FY25 Budget, which includes narrative descriptions on pages 6 through 16.

Department: A division within WSBA that outlines a specific area of activity. WSBA has 9 departments: Advancement, Finance, Human Resources, Information Technology, Office of Disciplinary Counsel, Office of the Executive Director, Office of General Counsel, and Regulatory Services.

Depreciation: The portion of the cost of a capital asset representing the value used over time, due in part to wear and tear, deterioration, and obsolescence, which is reflected as an expense during a particular period. Depreciation is calculated based on the cost of the capital asset divided by its estimated useful life. WSBA calculates depreciation monthly.

Expenses:

Direct: Expenses that are directly related to the support of a specific program or function of the WSBA. Examples include committee expenses or venue costs for putting on an event.

Indirect: Expenses that benefit the whole organization and are considered the basic cost of doing business. Examples include salaries, benefits, payroll taxes, rent, telephone, insurance, legal advice, auditing services, computer equipment, etc. There are numerous ways to allocate common expenses; however, the method chosen must be meaningful, reasonable, accurate, and consistently applied. Generally speaking, WSBA allocates costs based on the staff that are assigned to perform work within each cost center. The allocation of staff time to a cost center can range anywhere from 1-100% and many employees are allocated across multiple cost centers.

Fiscal Year: A 12-month accounting period that may not coincide with the calendar year. The WSBA's fiscal year is from October 1st to September 30th.

FTE: Full-time Equivalent position term is used to describe staffing positions. One FTE is based on 2,080 work hours in a 12-month year. WSBA has employees ranging from 0.5 FTE to 1.0 FTE.

Fund Accounting: An accounting method that is used to track the amount of money allocated to various operations at an organization. WSBA's fiscal policies outline four distinct funds:

General Fund: Houses the majority of WSBA's operations and is funded primarily by license fees. The General Fund comprises of 39 cost centers and the majority of WSBA's FTEs. WSBA's General Fund Reserves are used to support this fund (see "Reserves").

Client Protection Fund: In 1995, the Washington State Supreme Court and the WSBA created the Client Protection Fund (CPF). The purpose of this restricted fund is to relieve or mitigate a loss sustained by any person due to the dishonesty of, or failure to account for money or property entrusted to, any member of the WSBA in connection with the member's practice of law, or while acting as a fiduciary in a matter related to the member's practice of law. The CPF fund receives a mandatory annual assessment from each active lawyer, LLLT, and pro hac vice member of the WSBA. This fund reflects the financial activity for the CPF (1 cost center) and is supported by the CPF reserve fund.

Continuing Legal Education Fund: The fund includes financial activity for 3 cost centers: CLE Products, CLE Seminars, and Deskbooks, and the fund is supported by the CLE Reserve Fund.

Sections Funds: The total difference between revenues, and direct and indirect expenses, for all Sections each year are designated as Section funds. Separate ledgers are maintained for each Section, making up the total for the Section funds.

Fund Balance: The fund balances, or net assets, of the WSBA are the difference between assets and liabilities. Fund balances are either unrestricted or restricted. The Board of Governors may designate, and has designated, portions of the WSBA's unrestricted fund balance for specific purposes. During the annual budgeting process, the Budget & Audit Committee reviews all fund balances, determine if funds allocated to the various reserves should be adjusted while taking into account the goals and purposes of each fund, and make any recommendations for adjustments to the Board of Governors.

Membership Year: WSBA members are licensed on an annual basis, which is a calendar year beginning January 1st through December 31st.

Per-Member Charge: An amount charged for each Section membership to reimburse WSBA for the cost of administering Sections, which includes salaries, benefits, payroll taxes, overhead, and direct expenses. The Section Per-Member Charge (PMC) is calculated as part of the WSBA annual budget process and is based on the first draft of the fiscal year budget.

Net Income: Funds remaining after subtracting expenses from revenue. These funds are then added to the corresponding reserve fund as they are accumulated.

Net Loss: Funds needed after subtracting expenses from revenue. These funds are subtracted from the corresponding reserve fund as they are used.

Reserves: Funds set aside and/or accumulated over time from excess net income to support an identified or unanticipated future funding need. The WSBA Board of Governors creates and designates reserve funds, which can be unrestricted or restricted. All funds except one (Client Protection Fund) are unrestricted.

General Fund Reserves:

Operating- established to cover unanticipated expenses in the event of an emergency.

Facilities- established to support future facilities needs such as an office move or refurbishment of existing office space or preparation for the purchase of operational real estate.

Special Projects & Innovation- established to provide funding for the development of new and innovative programs, projects or products that support and advance the mission of the WSBA.

License Fee Stability- established to assist with stabilization of license fees over time. The fund may be used to offset revenue shortages during a budget cycle in lieu of raising license fees.

Unrestricted- This is the cumulative balance of net assets from General Fund operations not otherwise restricted or designated to any other fund.

Continuing Legal Education Reserve: This reserve serves as an operating reserve in the event WSBA CLE suffers an unanticipated financial loss. The CLE reserve is funded by the annual operating income of the Deskbooks, CLE Seminars, and Products operations. Reserves may be used to cover any net loss, extraordinary costs, or technology upgrades.

Client Protection Fund Reserves: This reserve serves as an operating reserve for the CPF fund. Annual net income or losses for the fund accumulated from year-to-year results in the CPF restricted fund balance.

Sections Funds Reserves: An operating reserve fund for the WSBA sections, consisting of the cumulative balance of net assets/reserves of all sections.

Useful Life: The estimated amount of time an asset will remain in service and provide financial value.

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To: Board of Governors

From: Budget and Audit Committee

Date: August 18, 2025

Re: General Fund Reserve Recommendations

ACTION: Approve a reallocation of $460,000 to the Special Projects and Innovation Fund from Unrestricted Reserves.

BACKGROUND

The General Fund reserves are designated by the Board of Governors in WSBA Fiscal Policies and Procedures, and fund balances are reviewed at least annually. As events arise, recommendations are made to adjust the balances. Board established funds include Operating, Facilities, License Fee Stability, Special Projects and Innovation, and Unrestricted Reserves.

The Special Projects and Innovation Fund was established in September 2022 to provide funding for the development of new and innovative programs, projects, or products that support and advance the mission of the WSBA. In September 2025, the Board allocated $400,000 to the fund to support work budgeted in FY25 in the Regulatory Reform cost center which includes the development of the alternative pathways to licensure and pilot project for entity regulation. The FY25 Reforecast allocated $319,028 for Regulatory Reform, leaving a balance of $80,972 at the end of the year.

RECOMMENDATIONS

At their August 18, 2025 meeting, the Budget and Audit Committee unanimously approved recommending that the Board of Governors approve a total allocation to the Special Projects and Innovation Fund of $460,000 based on the needs outlined below. The total request incorporates anticipated remaining balance at the end of FY25.

Regulatory Reform

The final draft FY26 budget splits the two projects into separate cost centers. A new "Entity Regulation" cost center reflects projected financial activity for its start in FY26, using no reserve funds. The "Regulatory Reform" cost center covers continued development of alternative licensure pathways, aiming to submit rule changes to the Supreme Court by early 2026 and start accepting applications in FY27. For FY26, $237,199 from the Special Projects and Innovation reserve is needed to support this project.

Moderate Means Program

Throughout FY25, the WSBA worked with a consultant to evaluate the program. A report with recommendations is forthcoming. We will determine the strategic direction for serving low and moderate-income individuals within the next few months, with details expected by the end of FY25 or early FY26. In developing a budget for FY26, the final draft does not include specific funds for the program. Instead, we propose allocating $300,000 to the special projects and innovation fund, earmarked for the Moderate Means Program.

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2025 WSBA LEGAL TECHNOLOGY TASK FORCE REPORT

Embracing Change: Strategic Roadmap for Washington's Legal Profession in a Time of Technology Disruption

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Acknowledgments

This compilation of work would not be possible without the dedicated contributions of the members of the WSBA Legal Technology Task Force.

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Executive Summary

The Washington State Bar Association Legal Technology Task Force presents this comprehensive report of findings and recommendations on how the Washington State Bar Association (WSBA) can support legal professionals in Washington in understanding and adopting emerging technologies, particularly generative artificial intelligence (AI) and advanced data analytics.

Additionally, the report addresses the roles, responsibilities and impacts of entities outside of the WSBA in this technological transformation, and these entities are also the subject of some of the recommendations in the report.

THESE RECOMMENDATIONS FALL WITHIN 10 KEY POINTS:

1 **Harnessing Potential: The Role of Practitioners**

Legal professionals must integrate new technology tools into their daily work to serve clients efficiently, ethically, and competently. This includes understanding the implications of AI and other emerging technologies.

2 **Building the WSBA's Capacity and Strategic Partnerships: Innovating Responsibly and Ensuring Equitable Access**

The WSBA should build sustained internal capacity and create strategic partnerships with technology providers to support members in navigating technological change.

3 **Supporting Technology Competence: Meeting Diverse Practice Needs**

The WSBA should offer tailored guidance and support to help members build technology competence over time, addressing the varying needs of different practice settings. This includes affordable access to education focused on the use, limitations, and benefit of emerging technology.

4 **Building Ethical Frameworks for Technology Use: Supporting Professional Values in a Digital Age**

The Task Force emphasizes the importance of ethical adoption of technology and calls for the development and use of practical frameworks for evaluating new technologies and maintaining professional standards.

5 **Bridging the Cybersecurity Confidence Gap: From Confidence to Competence**

The WSBA should establish clear cybersecurity standards and offer affordable security training to help legal professionals protect client information and maintain public trust.

6 **Strengthening Court Capacity: Advancing Justice through Digital Transformation**

The rule of law and access to justice depends on our courts. The report calls for comprehensive AI training for court personnel, upgrading courtroom technology, implementing AI detection tools to enhance the administration of justice, and a standardized, modern, statewide court data infrastructure fully funded by the State and designed to support integration, efficiency, and equitable access to justice.

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7 Supporting Future Professionals: Transforming Legal Education for the Digital Era

Washington's law schools must comprehensively embed technology across curricula and educational experiences, building not just awareness, but deep technological proficiency.

8 Advancing Ethical Innovation and Equitable Access: Leveraging AI to Close the Justice Gap

The WSBA should ensure that AI-driven legal assistance supports meaningful access to justice by promoting the development of standards and supporting the creation of AI applications that are accurate, ethical, and designed with the public interest in mind.

9 Safeguarding Sensitive Legal Data: Strengthening Consumer Protection in a Digital Era

The Task Force highlights the need for clear cybersecurity standards, affordable security assessments, and transparency in cybersecurity practices to protect client information and maintain public trust.

10 Ensuring Regulatory Innovation and Stability: Future Expertise and Oversight

Technology is developing at rapid rates. Courts, lawyers, and the rules governing them cannot remain static or the chance of forced obsolescence is real. The Task Force recommends establishing a Supreme Court-affiliated board to provide expertise, oversight, and guidance on legal technology and regulatory innovation.

1. Board of Governors November 2023 Meeting Update, Washington State Bar Association (2023), https://www.wsba.org/docs/default-source/about-wsba/governance/bog-meeting-recaps/board-of-governors-meeting-recap-nov.-2-3-2023.pdf?sfvrsn=987f1cf1_2.
2. *Legal Technology Task Force Charter,* Washington State Bar Association (March 7, 2024), https://www.wsba.org/docs/default-source/legal-community/committees/legal-technology-task-force/wsba-legal-technology-task-force-charter.pdf?sfvrsn=3e881ff1_1.

WHY WAS THE TECHNOLOGY TASK FORCE CREATED?

In November 2023, the WSBA Board of Governors recognized the transformative impact of technology, particularly artificial intelligence (AI), on the legal profession.[1] As one of its strategic priorities for the 2023-24 fiscal year, the Board adopted the following statement:

> ***"Assess technology-related opportunities and threats and determine WSBA's role vis-à-vis regulation, consumer protection, and support to legal professionals."***

The creation of the Legal Technology Task Force is a step towards acting on this priority. The Task Force worked to assess the legal technology landscape, identify threats and opportunities across various legal sectors, and make recommendations that support and strengthen the understanding and use of technology in members' practice.[2] The Task Force's report emphasizes the effective, efficient, and ethical use of technology to enhance equitable access to justice.

As part of its work, the Task Force distributed a survey in October 2024 to more than 10,000 WSBA members and received 516 responses representing a wide range of practice areas, firm sizes, and geographic regions. This 5% response rate yields a 98% confidence level with a 5% margin of error. Using the Washington State Supreme Court's Access to Justice Tech Principles as a guide, the Task Force makes these recommendations to the Board of Governors on tangible steps WSBA can take to support and strengthen the use of technology within the legal profession in Washington state.

A Defining Moment

Legal services and technology have long been intertwined. The legal profession has largely embraced technologies that make organizing, transmitting, and accessing information easier—from word processing, e-discovery, databases, and filing systems to cloud platforms and communication tools.

But today's emerging technologies, particularly generative AI and advanced data analytics, are fundamentally different. These tools don't merely help legal professionals organize and access information—they generate, synthesize, and extract insights in ways that challenge our traditional understanding of legal work and professional responsibilities. They derive their power from combining and using data sets in unprecedented ways and perform complex analytical tasks at unprecedented scale. As such, they raise urgent questions as to whether they will not just augment but substitute for aspects of human learning, judgment, and analysis.

This is a defining moment for the legal profession. AI is already transforming legal practice, court operations, and client expectations. It will not replace lawyers, but it will change how lawyering is done.[3] That change is already underway, and the pace is accelerating. Legal professionals need to understand these new technologies not only for efficiency and productivity but also to remain competitive and responsive to their clients' evolving needs. Current approaches to profitability, efficiency, competitiveness, and legal ethics all demand adaptation. While these approaches promise new benefits, they also present complex risks that legal professionals must navigate to remain competitive and responsive to their clients' evolving needs.



AI is already transforming legal practice, court operations, and client expectations. It will not replace lawyers, but it will change how lawyering is done.

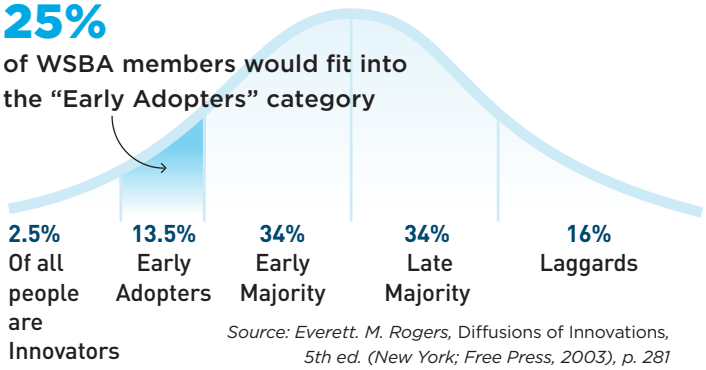
3. Ken Crutchfield, *AI Won't Replace Lawyers — But It Will Change How They Work*, Above the Law (March 26, 2024), https://abovethelaw.com/2024/03/ai-wont-replace-lawyers-but-it-will-change-how-they-work/.

Meeting Members Where They Are

WSBA members are not all in the same place when it comes to legal technology. Some are actively experimenting, while others are just beginning to learn. Many remain uncertain, or face barriers to adoption such as cost, time, or lack of training.

This is normal. As described by Everett Rogers' "Diffusion of Innovation" model,[4] technology adoption occurs along a predictable curve: from innovators and early adopters to the early and late majority, to eventually laggards. The goal is not to rush all legal professionals into using AI or any single tool. The goal is to meet members where they are, with practical, tailored guidance and support that helps them build the necessary technology competence.

"Diffusion of Innovation" model



Source: Everett. M. Rogers, Diffusions of Innovations, *5th ed. (New York; Free Press, 2003), p. 281*

The Task Force's recommendations reflect this approach. They are not one-size-fits-all. Some are directed at the WSBA itself, calling for internal reforms, new resources, and dedicated staff capacity. Others look outward, calling for collaboration with courts, law schools, technology providers, and legal employers. Across all sectors, this report emphasizes ethical adoption, thoughtful experimentation with an eye towards expanding access to justice, and member support.



The goal is to meet members where they are, with practical, tailored guidance and support that helps them build the necessary technology competence.

4. Bill Henderson, *What is the Rogers Diffusion Curve? (004)*, Legal Evolution (May 8, 2017), https://www.legalevolution.org/2017/05/rogers-diffusion-curve-004.

More Than a Trend: A Structural Shift

The legal profession is experiencing a fundamental shift in how technology is transforming legal work—not merely how quickly practitioners adopt it. Generative AI is the most visible example of the shift, but it is not the whole story.

Over the past decade, AI has quietly become embedded in everyday legal tools, e-discovery platforms, legal research engines, contract review software, and even word processors. As with earlier technological leaps, like the introduction of online research in the 1990s or cloud-based practice management tools in the 2010s, initial skepticism is giving way to necessity. In the years ahead, AI likely will become a baseline component of legal competence, even for those who choose not to use it directly.[5]

These changes will reshape how lawyers work, how courts operate, and how clients access legal services. AI is already changing billing models, research strategies, client communication, and even the way courts manage filings and review evidence. These technologies offer opportunities to enhance access to justice, improve language access, and streamline routine legal tasks. But they also pose risks to those fundamental aspects and raise concerns about inaccurate outputs, bias, data security concerns, and a potential erosion of trust in legal professionals. Legal professionals must understand these risks to serve clients competently and ethically and WSBA should support them in these efforts.



AI is already changing billing models, research strategies, client communication, and even the way courts manage filings and review evidence.

5. Tom Martin, *AI in the Legal Profession: Separating Substance from Hype*, The National Law Review (Oct. 9, 2024), https://natlawreview.com/article/ai-legal-profession-separating-substance-hype.

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Meeting the Moment: Washington's Opportunity to Lead

Washington's legal community is uniquely positioned to lead. With respected law schools, innovative legal professionals, and proximity to major technology companies, Washington is situated at the intersection of innovation and public service.

The Task Force believes that Washington can model how to embrace legal technology in a way that protects the public, upholds professional values, and improves the delivery of legal services and access to justice.

Technology is not an end in itself, especially not in the delivery of effective legal services. At the same time, it has become both a critical tool for legal practice and an essential subject matter that practitioners must understand. The WSBA Technology Survey Report: Preliminary Findings[6] (the Survey) shows a notable gap: Only 25% of survey respondents currently use AI in their practice, that rises to 70% among in-house counsel. But the implications of technology extend far beyond direct usage. As these technologies become increasingly ubiquitous in society, they challenge legal professionals to navigate both their application in practice and their role in shaping our world. Lawyers must also understand how the technology affects their clients' opportunities and challenges. The profession cannot opt out of this transformation—as one Task Force member noted, "the toothpaste is not going back in the tube."

Legal professionals need to embrace and leverage technological change rather than resist it. Practitioners have a special role not only as advocates for their clients but also as officers of the court with responsibility for the quality of justice, including safeguarding the rule of law. Understanding technologies like AI is becoming fundamental to fulfilling these obligations—from ensuring the authenticity of evidence to protecting client confidentiality, and from expanding access to justice to maintaining public trust. By pairing these developing tools with highly competent professionals, it is possible to enhance access to legal services and improve the overall quality of legal services.

As AI reshapes legal work, the profession must integrate these tools without compromising human judgment, strategic thinking, and ethical standards that form its essential value. Technology can enhance efficiency, but the profession's core value lies in human expertise and experience, strategic thinking, and the ability to navigate complexity. The legal profession must ensure that AI adoption strengthens—not weakens—the ethical foundations and public trust that define its role in society.

This moment is not just about catching up to change. It is about shaping the future of the profession.

6. *WSBA Technology Survey Report: Preliminary Findings*, Washington State Bar Association (April 2025), https://www.wsba.org/docs/default-source/legal-community/committees/legal-technology-task-force/wsba-technology-survey-report.pdf?sfvrsn=fd1e1bf1_1.

Ten Key Points

The Task Force developed ten key points to guide these efforts. Within each of the key points, the framework is set for the recommendations that follow.

The recommendations offer a roadmap for shaping the future of the legal profession through education, ethical guidance, regulatory clarity, and cross-sector collaboration. Throughout all the key points the focus remains clear: advance member competence, strengthen public protection, increase access to justice, and ensure that technology enhances, not undermines, our core values as legal professionals.

The key points are grouped to reflect where leadership and action are needed. They begin with the role of the individual practitioner—because above all else, effective and ethical practice in the age of AI depends on member engagement. No matter what steps the WSBA or the courts take, a legal professional's own understanding and judgment are foundational. Subsequent sections address the assessment of the institutional responsibilities of the WSBA, courts, law schools, and policymakers to provide the guidance, infrastructure, and regulation necessary to support members and protect the public.

1 Harnessing Potential: The Role of Practitioners

Legal professionals must proactively build their understanding of emerging technologies, particularly AI, to serve clients competently and uphold their professional obligations. While institutions like the WSBA and the courts have important roles to play in guiding AI adoption in legal settings, each practitioner is ultimately the steward of their own practice and their representation of clients. Individual professionals are best positioned to determine how to integrate new tools into their daily work, ensuring that they serve their clients and other stakeholders efficiently, ethically, and competently. At the same time, making sound determinations will depend greatly on understanding the uses and implication of emerging technology.

Generative AI, in particular, presents a dual learning challenge for the legal profession. It is both a tool for enhancing legal practice and a subject that demands understanding due to its quickly evolving capabilities and pervasive role in society. Legal professionals must grasp its implications as generative AI manifests in the real world. Within the practice, this means understanding how it impacts clients' lives—from issues like automated contracts and disputes over algorithmic bias to new vulnerability for fraud and other harms. In litigation contexts it will touch everything such as evidence authentication and deepfakes. In society, practitioners have a special role not only as advocates for their clients but also as officers of the court with responsibility for the quality of justice, including safeguarding the rule of law.

Generative AI is rapidly becoming a subject matter that legal professionals must understand, even if they opt not to use these tools themselves. For example, as AI-generated content, such as deepfakes and altered documents, becomes more prevalent, legal professionals must develop a foundational understanding of these technologies to effectively challenge or defend evidence in court. Judges and

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juries may also rely on expert testimony built using generative AI outputs, requiring legal professionals to critically engage with and cross-examine such testimony. The growing use of generative AI also introduces new cybersecurity threats, such as sophisticated fraud schemes, malicious deepfake content, physical threats and harassment, and AI-driven attacks designed to bypass traditional security measures.[7] Practitioners must understand these evolving threats to effectively advise clients and protect their own practices from vulnerabilities associated with AI-generated content.

Moreover, as AI becomes pervasive in areas like hiring, lending, and insurance underwriting, legal professionals will increasingly encounter disputes where algorithmic decisions are central to their clients' claims, rights, and opportunities. Understanding how algorithms are designed and trained, where biases can arise, and what remedies may be available will be critical for advising clients effectively. Federal and state agencies are investing in generative AI tools to help streamline and accelerate decisions that may impact access to benefits, with positive outcomes in many cases, but also with room for errors that may go unexplained or uncorrected.[8] All practitioners, whether they adopt AI or not, will need AI competencies such as the ability to evaluate fairness and legality of algorithmic practices in corporate, employment, and civil rights contexts.

This is a moment to be proactive, experiment, and learn. Every legal professional, regardless of practice area or experience, has an opportunity (and obligation) to take a hard look at their own work and ask: Am I leveraging the best tools and learning available to serve my clients fully and well? Am I doing so securely and responsibly?

Generative AI is rapidly becoming a subject matter that legal professionals must understand, even if they opt not to use these tools themselves.

AI and other legal technologies are rapidly expanding what is possible in legal practice, from streamlining research and document drafting to improving client communication and case strategy. Practitioners who actively engage with these technologies—and proactively build their cybersecurity competence—can thrive in this evolving landscape.[9] This means staying informed about emerging digital threats, regularly updating security practices, and ensuring robust protection of client information. It also means engaging with WSBA so it can serve the needs of its members.

RECOMMENDATIONS

A **Build Technology Competence:** Legal professionals must actively seek to understand how emerging technologies, particularly generative AI, impact their practice areas, client needs, and ethical obligations.

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7. Kristopher Turner, *Deepfakes and the Legal Profession*, WisBar (Jan. 2025), https://www.wisbar.org/NewsPublications/WisconsinLawyer/WisconsinLawyerPDFs/98/01/21_23rev.pdf.
8. Sanam Hooshidary, Chelsea Canada, and William Clark, *Artificial Intelligence in Government: The Federal and State Landscape*, NCSL (Nov. 22, 20224), https://www.ncsl.org/technology-and-communication/artificial-intelligence-in-government-the-federal-and-state-landscape.
9. Natalie Pierce and Stephanie Goutos, *Why Lawyers Must Responsibly Embrace Generative AI*, Vol. 21 Berkley Business Law Journal p.1-51, (2023).

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B **Start Small, Learn Fast:** Legal professionals should begin by becoming comfortable identifying common generative AI uses within their existing workflows. Starting small can build familiarity and confidence quickly.

C **Use Simple, Practical Resources**: Legal professionals should take advantage of short articles, checklists, and simple tools designed specifically for ease of use—especially those developed by the WSBA or other professional legal associations—to support issue spotting and evaluation of different technologies.

D **Collaborate to Accelerate Learning:** Legal professionals should engage with colleagues to share real-world examples and experiences involving technology to support legal practice. Peer discussions can clarify concepts and surface practical strategies that are already working in similar practices.

E **Stay Curious and Flexible:** Legal professionals should remain open to exploring how generative AI and other legal technologies may affect their practice. Incremental experimentation can reduce pressure and help practitioners adapt to change more effectively.

2 Building the WSBA's Capacity and Strategic Partnerships: Innovating Responsibly and Ensuring Equitable Access

To support members in navigating technological change, the WSBA must invest in internal capacity, cross-sector partnerships, and accessible technology education. Due to varying levels of preparedness and resources, WSBA members are facing rapid technological changes unevenly and often without the support needed to evaluate, adopt, or implement new tools. Small and mid-sized firms, in particular, often lack access to the training, guidance, and infrastructure they need to navigate this transformation while upholding ethical and professional standards.

The legal profession is experiencing unprecedented technological change, affecting everything from court operations and client service delivery to the tools available to consumers and litigants.[10] The Survey reveals the scope of this transformation—and the growing demand for support. While 70% of in-house counsel responding are already using AI tools, adoption drops to just 22% in small and mid-sized firms—not because these tools are irrelevant, but because practitioners lack the resources, guidance, and support to evaluate and implement them effectively. Early publicity about the potential flaws in AI also enforced doubts and suspicions about its efficacy and ethical framework. This disparity reflects a broader challenge: WSBA members need sustained, practical support to navigate technological change while maintaining their ethical obligations and professional standards. The WSBA made legal research tools available to members because they were indispensable yet inaccessible for many. It will need a similar approach for new tools.

The Survey shows that 69% of respondents believe AI use will require additional training and skills, yet only 26% rate their current knowledge as "good" or better. Members are seeking help with everything

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10. Drew Simshaw, *Access to A.I. Justice: Avoiding an Inequitable Two-Tiered System of Legal Services*, Vol. 24 Yale Journal of Law and Technology p.150-226, (2022).

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from evaluating technology tools to implementing security measures, understanding ethical implications, and adapting their practice models. These needs are not static—they evolve alongside the technologies themselves and as ethical frameworks develop to meet new challenges. As one Task Force member noted, "training and support for members are not a 'one and done' experience."

Ensuring that members can effectively navigate technological transformation is central to WSBA's mission to serve the public, champion justice, and uphold professional competence. To fulfill this mission amid rapid technological change, WSBA must build sustained internal capacity and establish flexible structures for ongoing support and collaboration. This includes assessing staffing capabilities, exploring the creation of a dedicated WSBA technology innovation workgroup to offer practical guidance, and investing in infrastructure for continuous education and resource delivery.

Strategic partnerships with technology providers are essential to bridge the adoption gap, especially among solo, small firm, rural, and underserved practitioners. These partnerships can expand access to AI-powered tools like AI legal assistants, document automation platforms, and practice management systems, prioritizing affordability and ease of use.

According to the WSBA study, 70% of in-house counsel responding are using AI tools, but adoption drops to just 22% in small and mid-sized firms.

Vendor-led training can help members evaluate and adopt tools confidently, without creating added burdens for WSBA staff.

The WSBA should maintain transparency and fairness in vendor partnerships by offering a straightforward process for vendors to submit proposals to be offered to WSBA members. While the WSBA offers a discount network and has one preferred insurance provider, it does not broadly endorse specific legal technology tools. Future partnerships should support member access without favoritism, focusing on helping members evaluate tools independently, securely, and ethically. There must also be a system for ongoing evaluation of tools so members do not get stuck with outdated technology.

RECOMMENDATIONS

A **Expand and Tailor Member-Focused Technology Education:** The WSBA should collaborate with technology vendors, law schools, and other industry experts to develop and implement a core curriculum focused on AI literacy, cybersecurity, ethics, and technology best practices. Training should be practical, accessible in multiple formats (e.g. CLEs, webinars, on-demand videos, and written guides), and especially responsive to the needs of solo and small firm practitioners. The WSBA should also offer advanced CLEs for deeper engagement with specialized tools.

B **Launch Interactive Workshops:** Experimental learning is critical to raising competence in emerging technology. The WSBA should create interactive, hands-on workshops offering practical, low-risk opportunities for members to directly experience emerging legal technologies.

C **Establish Dedicated Technology Expertise:** The WSBA should evaluate staffing capacity to

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ensure adequate expertise and resources are available for monitoring legal tech trends and providing responsive, ongoing member support including one-on-one consultations through the Practice Management Program. The WSBA should also explore technology mentorship or peer learning groups focused on legal tech implementation.

D **Develop a Strategic Technology Plan:** The WSBA should publish a comprehensive, multi-year strategic plan outlining goals, timelines, and priorities for advancing technology competence across the profession. Regular progress reporting and member surveys should track improvements in adoption, training, and ethical integration.

E **Centralize Technology Resources:** The WSBA should create a user-friendly online Technology Resource Hub with resources such as curated checklists, sample policies, toolkits, vendor directories, FAQs, and training materials.

F **Expand and Maintain the Practice Management Discount Network:** The WSBA should strengthen its vendor partnerships by expanding the Practice Management Discount Network. This includes transparent vetting processes, clear evaluation standards, and vendor accountability, while maintaining neutrality and fairness in offerings. The WSBA should partner with vendors to expand access to affordable technology tools and offer demonstrations, CLEs, and interactive trainings.

G **Form a WSBA Technology Implementation Workgroup:** The WSBA should establish a time-limited workgroup to collaborate with WSBA staff and stakeholders on implementing technology-focused recommendations, including development of tools, training resources, and member engagement strategies.

H **Pilot a WSBA Technology Showcase Event:** The WSBA should organize a large-format event featuring legal tech vendors, CLE speakers, and hands-on demonstrations to help members explore emerging tools in an interactive environment.

3 Supporting Technology Competence: Meeting Diverse Practice Needs

The WSBA must meet members where they are by tailoring support and education to different practice settings and needs. Technology competence has become fundamental to legal practice, but the path to achieving it varies dramatically across the legal profession. The Survey reveals both universal needs and stark disparities: while 69% of respondents recognize their need for additional technology training, their ability to access and implement that training varies significantly by practice setting. The contrast is particularly striking between large organizations with dedicated IT support and small or rural practices managing technology alongside daily client demands.[11]

These disparities extend beyond resources to fundamental differences in how technology serves different practices. In-house counsel, with 70% AI adoption rates, need advanced training on emerging tools. Meanwhile, small and rural practitioners seek immediately applicable solutions for routine tasks like document drafting and calendaring. As one

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11. Abigail Peterson, *2024 Solo and Small Firm Tech Report*, American Bar Association (April 21, 2025), https://www.americanbar.org/groups/law_practice/resources/tech-report/2024/2024-solo-and-small-firm-techreport/.

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practitioner noted in the Survey, "We need practical tools that work in the real world, not theoretical knowledge about AI." This diversity of needs demands an approach to education and support that is both comprehensive in scope and flexible in delivery.

The Survey points toward a strategic, targeted approach to training and competency building. While 72% of respondents support a technology-focused MCLE requirement, their needs and preferences vary significantly.

RECOMMENDATIONS

A **Provide Free or Low-Cost Educational Opportunities:** The WSBA should offer programs covering technology basics, ethics (including confidentiality), cybersecurity, privacy, and licensing considerations for existing and emerging technologies.

B **Provide Free or Low-Cost Personalized Consultations:** The WSBA should offer personalized consultations focused on emerging technology, cybersecurity, and ethics, with a particular focus on reaching underserved communities, solos, and small firms.

C **Expand Advanced Programming:** The WSBA should offer content covering specific applications of existing and emerging technologies, offer hands-on training opportunities, and consider expanding certifications to technologies particularly suited to legal practice.

D **Recommend a Technology MCLE Requirement:** The WSBA should consider recommending that the Washington Supreme Court adopt an MCLE requirement focused on cybersecurity and technology competence.

E **Explore Adding Technology and the Law as an Area in the Bar Exam:** Emerging technology has profound implication for every substantive area of law. WSBA should work with area law schools to determine what implications this has for curriculum and how best to include technology competence in the bar exam.

While 72% of respondents support a technology-focused MCLE requirement, their needs and preferences vary significantly.

4 Building Ethical Frameworks for Technology Use: Supporting Professional Values in a Digital Age

Legal professionals need practical tools to evaluate and ethically implement new technologies, not just updated rules. The ethical implications of technology in legal practice extend far beyond any single tool or application. While only 25% of survey respondents believe current ethical rules adequately cover AI use, the Survey reveals a deeper challenge: practitioners need practical guidance on how to fulfill their professional obligations in an increasingly digital practice environment. This need is most acute among those using technology most extensively—notably, in-house counsel who report the highest AI adoption rates (nearly 70%) also express the least confidence in current ethical guidelines.

The WSBA's Committee on Professional Ethics (CPE) is developing specific guidance on AI use, focusing on core professional obligations including competence,

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confidentiality, supervision, and fees. This important work will help set baseline expectations, and the Task Force strongly supports the developing work in the CPE. However, the Survey and working group findings indicate that practitioners need more than revised Rules of Professional Conduct ('RPCs') or formal rule guidance[12]—they need practical frameworks for evaluating new technologies, implementing appropriate safeguards, and maintaining professional standards while embracing beneficial innovation.[13]

These frameworks must address several key challenges identified by the Task Force. Legal professionals need clear guidelines for protecting client confidentiality when using AI and other cloud-based tools. They need practical standards for supervising technology-assisted work, whether performed by legal professionals, staff, or automated systems. Most importantly, they need help understanding how to maintain their professional judgment and ethical obligations while leveraging technology to serve clients more effectively.[14]

RECOMMENDATIONS

A **Define Baseline Ethical Standards for Emerging Technologies:** The Board of Governors, through the CPE, and, where applicable, with approval of the Washington Supreme Court, should define baseline ethical standards for emerging technologies. This includes evaluating the sufficiency of existing RPCs, creating due diligence guidelines, and defining the enforceability of such guidance.

B **Publish Clear, Practical Ethics Guidance For Member Questions about Emerging Technologies:** The WSBA should expeditiously create and publish clear, accessible materials, including FAQs and practical content, to help members to quickly identify ethical risks prior to adoption of emerging technologies, including but not limited to confidentiality breaches, bias, inaccuracies, and lack of transparency. These need to be regularly reviewed and updated as technology advances.

C **Create an Ethical Evaluation Framework and Resources for Technology Use:** The WSBA should develop a practical, generalized Ethical Evaluation Framework to help practitioners in systematically assessing new and emerging technologies for compliance with ethical obligations.

5 Bridging the Cybersecurity Confidence Gap: From Confidence to Competence

A gap exists between legal professionals' confidence in their cybersecurity practices and their actual implementation. The WSBA must close this gap with standards, tools, and support. The Survey reveals a concerning paradox in how legal professionals approach cybersecurity. While 79% of respondents express confidence in their ability to protect client and organizational data, the actual implementation of basic security measures tells a different story. Only 34% conduct regular security audits, 37% use data

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12. Dennis Kennedy, *Handout from "Ethical Implications of Generative AI for the Michigan Lawyer" Presentation*, Dennis Kennedy Blog (Dec. 14, 2023), https://www.denniskennedy.com/blog/2023/12/handout-from-ethical-implications-of-generative-ai-for-the-michigan-lawyer-presentation/.
13. Jonathan H. Choi, Amy B. Monahan, and Daniel Schwarcz, *Lawyering in the Age of Artificial Intelligence*, Minnesota Law Review (Nov. 30, 2024), https://minnesotalawreview.org/article/lawyering-in-the-age-of-artificial-intelligence/.
14. Keith Robert Fisher, *ABA Ethics Opinion on Generative AI Offers Useful Framework*, American Bar Association (Oct. 3, 2024), https://www.americanbar.org/groups/business_law/resources/business-law-today/2024-october/aba-ethics-opinion-generative-ai-offers-useful-framework/.

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encryption, and even multi-factor authentication—considered a fundamental security practice by experts—is used by just 68% of respondents. This gap between confidence and implementation creates significant risk not just for individual practices, but for the entire legal system's ability to maintain client trust and confidentiality.[15] This is at a time when advances in AI allow more sophisticated methods of targeting confidential information. Legal professionals hold valuable client confidences—consumers are rarely in a position to evaluate data security of legal service providers, and there is limited consumer protection oversight in the area.[16]

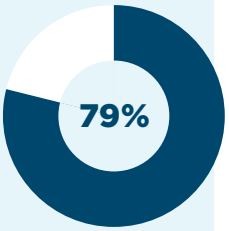
The challenge is particularly acute for small firms and solo practitioners. While larger organizations, government agencies, and in-house legal departments generally report somewhat more robust security infrastructures, smaller practices often lack both the resources and expertise to implement basic protections.[17] This disparity isn't just about technology—it reflects fundamental differences in access to IT support, security expertise, and implementation resources. Yet these smaller practices often handle equally sensitive client information, making their security gaps a significant concern for the profession as a whole. This parallels the client-facing concerns raised in key point 9 regarding strengthening consumer protection in the digital era.

Making cybersecurity accessible and practical for all practice settings must be a priority. Legal professionals shouldn't need to become cybersecurity experts, but they do need clear standards, practical implementation tools, and accessible support. This includes basic security checklists, incident response playbooks, and emergency support resources. Many of these tools already exist through the WSBA,[18] the ABA,[19] and other sources, but awareness and adoption remain low. Moving from where we currently are to awareness, understanding, and implementation will take both resources and innovation from the WSBA. The profession needs both better awareness of existing resources and new, practice-specific tools that

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FAST FINDINGS

Cybersecurity by the numbers



79% of respondents express confidence in their ability to protect client and organizational data.



34% conduct regular security audits.



37% use data encryption.



68% of respondents use multi-factor authentication.

15. Sharon D. Nelson, *25% of Law Firms Have Been Breached*, ALPS (Jan. 11, 2022), https://www.alpsinsurance.com/blog/25-of-law-firms-have-been-breached.

16. *Formal Opinion 2024-3: Ethical Obligations Relating to a Cybersecurity Incident*, New York City Bar (July 18, 2024), https://www.nycbar.org/reports/formal-opinion-2024-3-ethical-obligations-relating-to-a-cybersecurity-incident/.

17. Abigail Peterson, *2024 Solo and Small Firm Tech Report,* American Bar Association (Apr. 21, 2025), www.americanbar.org/groups/law_practice/resources/tech-report/2024/2024-solo-and-small-firm-techreport/.

18. *The Law Firm Guide to Cybersecurity*, Washington State Bar Association (Oct. 8, 2021), https://www.wsba.org/for-legal-professionals/member-support/practice-management-assistance/guides/cybersecurity-guide.

19. *Cybersecurity Resources for Small Law Firms*, American Bar Association, https://www.americanbar.org/groups/cybersecurity/small-solo-resources/.

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make security implementation straightforward and manageable.

RECOMMENDATIONS

A **Establish Cybersecurity Expectations:** The WSBA should establish clear, and actionable cybersecurity standards for legal professionals, including minimum expectations such as multi-factor authentication, encryption, secure data storage, and regular audits. These standards should build upon existing WSBA cybersecurity resources and be regularly reviewed and updated to address evolving threats and technologies.

B **Provide Affordable Cybersecurity Assessments:** The WSBA should collaborate with cybersecurity experts, insurers, and malpractice carriers to provide low-cost, or free, cybersecurity assessments tailored to the needs of solo and small-firm legal practices.

C **Expand Cybersecurity Awareness, Training, and Support:** The WSBA should actively promote existing cybersecurity resources, expand those to meet practice specific needs, develop simplified checklists and step-by-step implementation guides tailored for solos and small firms, and deliver targeted, practice-oriented training through webinars, workshops, and on-demand resources.

D **Promote Cybersecurity Transparency With Clients:** The WSBA should formally recommend or require legal professionals to explicitly disclose their cybersecurity practices in client engagement letters, thereby strengthening client trust, transparency, and practitioner accountability.

6 Strengthening Court Capacity: Advancing Justice Through Digital Transformation

6.1 ADAPTING COURTS TO RAPID TECHNOLOGY CHANGE

The rule of law is dependent on ensuing our courts are fully equipped and supported so they can meet the technology changes. Washington's courts must modernize responsibly and equitably, balancing emerging technologies with protections to ensure justice, fairness, and access. The COVID pandemic has demonstrated both the necessity and possibility of remote proceedings, while the emergence of AI tools presents new opportunities and challenges for the administration of justice. The Survey reveals that legal professionals are divided on AI's impact on courts—40% express concerns about efficiency and fairness, while 38% see positive potential. This division underscores the need for a thoughtful, structured approach to court technology evolution.

AI presents both a threat and a major opportunity for closing the justice gap. The Washington Supreme Court's recent Order[20] enabling a Pilot for Entity-Based Regulation is a promising step. The Task Force supports implementation of the Pilot and encourages continued experimentation with technologies and business structures that can improve legal access.

Courts are facing increasingly complex and urgent challenges. As AI-generated evidence and fabricated citations become more common, courts, despite operating with limited resources, must still be equipped to assign accountability and ensure

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20. Order Approving the Adoption of a Pilot Project to Teach Entity Regulation, Order No. 25700-B-721 (Wash. Dec. 2024). www.courts.wa.gov/content/publicUpload/Supreme%20Court%20Orders/Order%2025700-B-721.pdf.

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accuracy.[21] They must balance remote access with procedural fairness. They must leverage technology to expand access while maintaining the integrity of judicial processes. The Administrative Office of the Courts (AOC) and local jurisdictions need appropriate staffing and funding to evaluate these tools and support courts in modernizing their technology infrastructure. But beyond resources, courts need adequate education, support. and clear frameworks for managing technology-driven change.[22]

Key priorities identified by the Task Force include providing uniform training and education for court personnel, consistent with education and training recommendations in key point 3 for legal professionals. Updating evidence rules to address AI-generated content, creating authentication standards for digital evidence, and implementing hyperlinked pleadings to help courts verify citations are also key priorities. Equally important is making court forms AI-compatible to support self-represented litigants while reducing the burden on court personnel. The courts must also address language access, with AI translation tools offering potential for routine communications while ensuring constitutional requirements are met for critical proceedings. Finally, the profession would benefit from high level guidance like that recently issued by the Illinois Supreme Court,[23] with a clear, pragmatic approach to AI, permitting its use while holding lawyers and judges accountable for accuracy, ethics, and confidentiality.

As AI-generated evidence and fabricated citations become more common, courts must still be equipped to assign accountability and ensure accuracy.

RECOMMENDATIONS

A **Provide Comprehensive Court Training on AI and Technology:** The Supreme Court and the AOC should establish and fund comprehensive training programs for judges, clerks, and court staff on the responsible use of AI and related courtroom technologies. These programs should include formal certifications and partnerships with trusted technology providers for training support.

B **Upgrade Courtroom Technology:** The WSBA should make it a priority to advocate for statewide funding to equip all Washington trial courts with essential courtroom technology, including reliable broadband access, stationary and movable microphones, audio amplification systems, high-resolution monitors, wall-mounted monitors, and video conferencing software.

C **Update Rules on Electronic Evidence:** The WSBA should work with the Washington Supreme Court to revise court rules governing the introduction of electronic evidence, specifically addressing foundation

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21. *AI-Generated Evidence: A Guide for Judges*, National Center for State Courts, https://www.ncsc.org/resources-courts/ai-generated-evidence-guide-judges.
22. Richard Susskind, *The Future of Courts*, Harvard Law School Center on the Legal Profession (August 2020), clp.law.harvard.edu/knowledge-hub/magazine/issues/remote-courts/the-future-of-courts/.
23. Illinois Supreme Court Policy on Artificial Intelligence (January 1, 2025), https://ilcourtsaudio.blob.core.windows.net/antilles-resources/resources/e43964ab-8874-4b7a-be4e-63af019cb6f7/Illinois%20Supreme%20Court%20AI%20Policy.pdf.

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requirements, authenticity, objections, and concerns related to transparency in algorithms and regarding AI-generated content, such as deepfake images and synthetic audio.

D **Implement AI Detection Tools:** The WSBA should advocate for courts to adopt processes, assisted by standardized tools, to evaluate the legitimacy of citations and legal arguments within motions, briefs, and legal memoranda.

E **Enhance Language Access through AI:** The WSBA should encourage courts to adopt advanced AI translation and transcription technologies to improve court hearings and routine communications, while ensuring compliance with constitutional language access requirements.

F **Simplify Court Forms and Filings:** The WSBA should advocate for, and potentially partner with the courts, to develop AI-powered tools, such as chatbots, to help self-represented litigants complete and fill standardized court forms. AI should be employed to translate these forms into various languages, with accuracy verified by qualified interpreters.

6.2 MODERNIZING FRAGMENTED, OUTDATED COURT DATA INFRASTRUCTURE TO IMPROVE EFFICIENCY AND ACCESS

Washington's courts operate on outdated and fragmented digital systems, which hinder transparency and public access, delay justice, and prevent cross-jurisdictional innovation. Washington courts currently operate without a unified digital system. Calendaring tools, case management systems, and e-filing platforms differ widely due to funding structures and jurisdiction—specific needs, and current local systems rely heavily on fragmented, decades-old technologies.[24] While the courts' flagship program Odyssey brings some commonality to data infrastructure, it is far from complete.

To realize the benefits of emerging technologies— and to avoid falling further behind—Washington's courts need consistent and compatible e-filing systems statewide. Their back-end systems must be able to share and analyze data across jurisdictions, enabling the use of AI tools to improve transparency. access, equity, and efficiency. This should be done in a way that cost barriers are removed or minimized for access to court records.

Achieving this will require significant state investment in new technology, particularly in rural and underfunded jurisdictions, as well as restructuring of data "ownership" models. It also involves addressing the inherent political tensions among the judiciary, legislative bodies, county governments including court clerks, and the broader public surrounding court records and data ownership. A modern statewide court data infrastructure, and resolution of the political question of data ownership, would reduce administrative burdens, improve transparency, and help jump start modern innovations such as AI-driven legal assistance, user-friendly digital services, and more equitable public access. Building this infrastructure will require long-term state funding and close coordination across stakeholders at all levels of government.

Without a fully unified digital system, courts face persistent inefficiencies, burdensome manual

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24. Moe K. Clark, *'It's an uphill battle': Decades-Long Effort to Unify Washington's Court System Again Falls Short*, InvestigateWest (March 20, 2025), https://www.investigatewest.org/investigatewest-reports/its-an-uphill-battle-decades-long-effort-to-unify-washingtons-court-system-again-falls-short-17840352.

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processes, and critical data gaps. These issues are consistently reported by legal practitioners across the state, including in the Survey, and fall especially hard on self-represented litigants and rural communities.

RECOMMENDATION

A **Advocate for Standardized, Statewide Court Data Infrastructure Fully Funded by the State:** The WSBA should strongly advocate for a standardized, modern statewide court data infrastructure fully funded by the State and designed to support integration, efficiency, and equitable access to justice.

7 Supporting Future Professionals: Transforming Legal Education for the Digital Era

To prepare students for modern legal practice, Washington's law schools must comprehensively integrate technology into curriculum, training, and culture, not as an add-on, but as a core component of legal education. The rapid evolution of technology is reshaping legal practice at every level, demanding fundamental shifts in legal education. To meet these demands, Washington's law schools must move beyond incremental updates to the curriculum and embrace comprehensive, transformative integration of technology and innovation. The next generation of legal professionals will enter a profession already deeply shaped by generative AI, advanced data analytics, cybersecurity demands, and digital innovation.[25] Traditional legal education models, emphasizing theory without adequate practical technological integration, no longer adequately prepare students for practice.

Law schools must comprehensively embed technology across curricula and educational experiences, building not just awareness, but deep technological proficiency.

Law schools must comprehensively embed technology across curricula and educational experiences, building not just awareness, but deep technological proficiency.[26] This includes providing hands-on experiences, real-world practical clinics, and explicit pathways toward technology-driven careers.[27] Crucially, these efforts must also include significant investments in faculty skills and confidence in emerging technologies, ensuring educators can effectively guide and inspire future lawyers. By fostering a culture of innovation, curiosity, and ethical technology use, Washington law schools play a pivotal role in equipping new lawyers not only to navigate technological change, but to become its responsible leaders.

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25. Anthony Davis, *The Future of Law Firms (and Lawyers) in the Age of Artificial Intelligence*, American Bar Association (Oct. 2, 2020), www.americanbar.org/groups/professional_responsibility/publications/professional_lawyer/27/1/the-future-law-firms-and-lawyers-the-age-artificial-intelligence/.

26. Raymond H. Brescia, *Teaching to the Tech: Law Schools and the Duty of Technology Competence*, Vol. 62 62 Washburn Law Journal p.507-540, (2023).

27. *CODEX*, Stanford Law School, https://law.stanford.edu/codex-the-stanford-center-for-legal-informatics/ (last visited July 8, 2025).

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RECOMMENDATIONS

A **Embrace a Technology Conscious Culture:** Washington law schools should foster a culture in which faculty, staff, and students are supported in navigating the challenges and opportunities presented by new technologies in legal education and in the rapidly changing legal services landscape.

B **Maintain a Practice-Ready Curriculum:** Washington law schools should ensure that impactful technologies are addressed in courses focusing on technology skills (e.g. document automation, contract review, and data analysis) and processes (e.g. e-discovery, digital evidence, and cybersecurity), as well as in traditional and core courses (e.g. professional responsibility and civil procedure), through independent study opportunities (e.g. online tutorials, webinars, technology-focused directed research), and in clinics and externships that allow experiential opportunities with technology in different settings.

C **Assess Student Progress:** Washington law schools should establish a requirement that students demonstrate technology competence before graduating, such as by completing certain technology-focused course work, by completing technology-focused projects, or through a reputable technology certification program. Schools should regularly assess student progress and identify areas needing additional training or support.

D **Ensure Post-Graduation Success:** The WSBA and Washington law schools should establish a mentorship program that pairs students with practitioners who are experienced in using technology in their law practice. They should also promote a career path focused on technology and law by providing students with guidance on how to pursue a career in this area.

E **Support Faculty:** Washington law schools should encourage faculty to develop their own technology skills and support them through regular training on software, hardware, and online platforms commonly used in legal services, so they can effectively teach and mentor students.

F **Influence Broader Law and Policy Development:** Washington law schools should support faculty scholarship and research related to technology, hold continuing legal education courses on technology, and maintain an institute or center that focuses on the intersection of law and technology to provide a hub for research, education, and innovation.

8 Advancing Ethical Innovation and Equitable Access: Leveraging AI to Close the Justice Gap

The public is increasingly turning to AI-driven tools for legal help, without attorney involvement, creating an urgent need for ethical standards, public education, and innovative delivery models that expand access to justice without compromising consumer protections A recent LexisNexis survey[28] found that 27% of consumers have used generative AI to answer legal questions on their own, a figure that closely parallels the 25% of legal professionals using generative AI in their practice, according to the Survey. This data underscores a critical shift: the public is turning to AI

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28. *Generative AI & the Legal Profession*, Lexis Nexis (April 2023), https://www.lexisnexis.com/pdf/ln_generative_ai_report.pdf.

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for legal help, often without the benefit of attorney oversight or guidance.

These tools present both an opportunity and risk. On one hand, AI-powered tools offer meaningful opportunities to expand access to justice by reducing costs, improving legal literacy,[29] and simplifying routine legal tasks for self-represented litigants[30] and communities.[31] On the other hand, these tools also pose serious risks if left unchecked. Without thoughtful regulation and professional engagement, they risk spreading misinformation, violating unauthorized practice of law (UPL) rules, and impacting the quality of legal guidance the public receives.

The WSBA, courts, and legal professionals must embrace their role in shaping the future of ethical legal technology by ensuring that AI-driven legal assistance supports, rather than undermines, meaningful access to justice. This means proactive investment in innovation, formation of strategic partnerships, and ensuring equitable technology access. The Washington Supreme Court's recent authorization of a regulatory pilot program for new business structures and entity-based regulation represents an essential step toward responsible innovation and enhanced access to legal services.[32]

Rather than viewing AI as a risk to legal service delivery, the profession should lead efforts to integrate these tools responsibly— developing standards, clarifying UPL boundaries, and creating AI applications that are accurate, ethical, and designed with public interest and trust in mind. Legal professionals are not only protectors of justice; they are also critical stakeholders in building a more inclusive and technologically responsive legal system.

RECOMMENDATIONS

A **Establish Ethical Boundaries for AI Legal Tools:** The WSBA, in collaboration with the Washington Supreme Court, should establish clear guidelines distinguishing appropriate from unauthorized or misleading uses of AI-generated legal advice to protect consumers from misleading or inaccurate information, reduce bias, and protect fundamental rights. Legal technology providers should be required to ensure transparency in how their systems function and to be accountable for their outputs.

B **Expand Court-Based AI Resources:** The WSBA should advocate that Washington courts invest in practical, user-centered AI tools, such as multilingual self-help portals and simplified online forms, to expand meaningful legal access for underserved communities.

C **Support Public-Facing AI Literacy:** The WSBA and Washington Courts should jointly develop public education materials to enhance consumer understanding of AI-based legal tools, empowering the public to use AI responsibly and with confidence.

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29. Drew Simshaw, *Access to A.I. Justice: Avoiding an Inequitable Two-Tiered System of Legal Services*, Vol. 24 Yale Journal of Law and Technology p.150-226, (2022).

30. Christopher L. Griffin, Jr., Cas Laskowski, and Samuel A. Thumma, *How to Harness AI for Justice*, Judicature International (July 23, 2024), https://judicature.duke.edu/articles/how-to-harness-ai-for-justice/.

31. Nicole Black, *Access to Justice 2.0: How AI-Powered Software Can Bridge the Gap*, ABA Journal (Jan. 24, 2025, 10:20am), https://www.abajournal.com/columns/article/access-to-justice-20-how-ai-powered-software-can-bridge-the-gap.

32. Order Approving the Adoption of a Pilot Project to Teach Entity Regulation, Order No. 25700-B-721 (Wash. Dec. 2024). www.courts.wa.gov/content/publicUpload/Supreme%20Court%20Orders/Order%2025700-B-721.pdf.

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D **Educate Legal Professionals on Inclusive AI Implementation:** The WSBA should partner with law schools and MCLE providers to offer targeted programs to equip legal practitioners to ethically use AI tools that genuinely benefit and are designed to serve underserved communities.

E **Foster Development of Affordable and Scalable Tools:** The WSBA should explore and promote funding mechanisms that expand the development of affordable, user-friendly technologies for small legal practices, public interest service providers, and individuals with limited resources.

9 Safeguarding Sensitive Legal Data: Strengthening Consumer Protection in a Digital Era

Legal professionals have a responsibility to protect sensitive legal data from misuse in a rapidly evolving digital landscape. They also are on the front lines where their clients suffer or face the rising misuse of technology. As legal information becomes increasingly commodified by AI tools and online platforms, stronger consumer protections, clearer regulations, and lawyer-led advocacy are urgently needed. Integrating AI into governance, constitutional systems, and judicial processes raises urgent questions about protecting consumer data from misuse, manipulation, or unauthorized access. It also requires the WSBA to be an active participant in updating key consumer protection laws.

Consumers are increasingly turning to online platforms for help with deeply legal issues—like health issues, financial challenges, immigration, or domestic violence—without realizing how their data may be tracked, shared, or sold.[33] If not thoughtfully managed, these advancements risk undermining the rule of law and democratic principles by exposing users to risks ranging from surveillance to fraud, to behavioral advertising to the commodification of legal needs. For example, when an individual visits an immigration law website, uses a chatbot that provides landlord tenant guidance, or installs an app that provides legal services for victims of domestic violence, hundreds of businesses may track and monetize that person's personal information, often including their location. The chatbot operator, for example, could sell the unique online identifiers or even the queries of its users to online advertising platforms who can use the personal information to target digital ads or to third party data aggregates. Increased default settings on apps allow sales of the information, including nature of inquiries and geolocation. Others allow cross-app tracking so information from a device is shared more broadly.

This risk also exists even earlier in the process: consumers who search for 'legal advice' in the app store on their phones can choose among hundreds of legal services apps available today—let alone understand what tracking or sharing of information is permitted by default under the app's terms of service? The Task Force believes the WSBA is well positioned to develop materials to help consumers evaluate such offerings, partner with other bars to develop a standard 'seal' to identify legal services websites and apps meeting certain criteria, and provide a mechanism for consumers to ask questions about such apps, and where, if appropriate, to report the

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33. Michelle Egbert, Comment, *Access to Freedom: Can Technology Improve Access to Justice for Survivors of Domestic Abuse?*, Vol. 36 Journal of the American Academy of Matrimonial Lawyers p.187-207, (2023). www.aaml.org/wp-content/uploads/7-MAT105.pdf.

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unauthorized practice of law.

According to the Survey, 68% of legal professionals believe existing consumer protections for AI are inadequate. Nearly 60% support the creation of AI-specific privacy protections, and over 50% favor measures requiring companies to disclose how consumer data is used and giving individuals the right to correct or delete data utilized by AI models. Without robust safeguards and oversight, AI-driven decision-making—whether in the private or public sector—can silently erode personal privacy and civil rights, especially when used to make decisions that have significant legal or similarly significant effects, such as benefits and housing eligibility or criminal justice outcomes.[34] These concerns are not theoretical: they implicate fundamental values like personal safety, due process, dignity, and equal treatment under the law.

To safeguard access to and the administration of justice, Washingtonians need greater privacy rights. In implementing groundbreaking protections for consumer health data in 2023 by enacting the Washington My Health My Data Act, the legislature found:

> ***"The people of Washington regard their privacy as a fundamental right and an essential element of their individual freedom. Washington's Constitution explicitly provides the right to privacy. Fundamental privacy rights have long been and continue to be integral to protecting Washingtonians and to safeguarding our democratic republic."***

Yet current protections focus primarily on health data. Legal data is similarly sensitive, directly linked to an individual's safety, freedom, and dignity. For instance, seeking information on protective orders or criminal defense services reveals deeply sensitive circumstances. Currently, Washingtonians' legal data lacks robust protections against behavioral profiling and targeted advertising. The WSBA should advocate for limitations on the use of consumers' legal data, as well as more comprehensive privacy rights.

AI and predictive analytics, fueled by vast amounts of seemingly routine data, can reveal highly sensitive personal information—including personality traits, health conditions and biometrics, political preferences, or purported intelligence levels derived from social media activity—potentially undermining privacy and dignity.

Washingtonians should have comprehensive privacy rights, including the right to know what information organizations collect, how it is used and a way to correct or challenge such data or information. They should also have the right to opt-out of automated decision making, particularly when their livelihoods are at stake. Additionally, organizations should have greater obligations when it comes to processing personal information, including an obligation to practice data minimization and to provide consumers with meaningful choice related to certain uses of information.

Washington's Rules of Professional Conduct explicitly charge lawyers with ensuring justice, fairness, and transparency amid technological change. Lawyers must therefore advocate for legislative improvements, adopt stronger internal data protections, and ensure their technology partners align with professional

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34. Olga Akselrod, *How Artificial Intelligence Can Deepen Racial and Economic Inequities*, American Civil Liberties Union (July 13, 2021), www.aclu.org/news/privacy-technology/how-artificial-intelligence-can-deepen-racial-and-economic-inequities.

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responsibility standards. By critically assessing AI's application in governance and consumer spaces and advocating for its alignment with ethical and constitutional principles, legal professionals can play a key role as essential guardians of the rule of law in a time of rapid technological and societal change. *Scope of WSBA Advocacy—The Task Force recognizes that WSBA's ability to advocate on public policy issues is limited by the Keller rule, which restricts activities funded by mandatory dues to matters directly related to regulating the legal profession or improving the quality of legal services. The Task Force identifies these issues as significant for Washington consumers and encourages legislative and policy consideration, while recommending WSBA advocacy only within the bounds of these permissible activities.*[35]

RECOMMENDATIONS

A **Advocate for Updated Consumer Protection Laws:** The WSBA should advocate, consistent with Keller limitations, for regular updates to state consumer protection laws and regulations that provide meaningful protections and address abuses enabled by AI and other digital technologies.

B **Advocate for Enhanced Consumer Privacy Protections:** The WSBA should advocate, within Keller limitations, for expanded privacy protections for sensitive information, including restrictions on the collection, use, and sale of personal data by legal technology providers.

C **Provide Title 7 RPC Guidance on Lawyer Advertising and Marketing:** The WSBA should update RPC Title 7 rules on advertising to clearly prohibit the sale or sharing of sensitive personal data collected by legal websites and applications.

D **Develop Consumer-Focused Certification Programs:** The WSBA should develop a consumer-facing certification program or standardized "seal" to help the public identify trustworthy legal-service websites and apps, and to enable consumers to report entities operating without authorization to practice law.

E **Provide Education on AI and Consumer Protection:** The WSBA should provide ongoing education to legal professionals on evolving AI-related consumer protection issues, laws, and regulations, explicitly covering algorithmic bias, data privacy, and remedies available to consumers impacted by automated decision-making.

10 Ensuring Regulatory Innovation and Stability: Future Expertise and Oversight

Rapidly evolving legal technologies—especially AI, automation, and virtual platforms—pose profound challenges and opportunities to traditional regulatory frameworks, underscoring the urgent need for dedicated oversight. Addressing these effectively requires ongoing, expert oversight. The recommendations in this report highlight the need for a stable, empowered body to provide review, expertise, oversight, and guidance into the future. The consensus within the Task Force is that new technologies—whether targeted to consumer legal services (for example an online service the provides legal advice for a divorce or estate planning) or simply horizontal platforms used by consumers to solve legal

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35. Wash. Rules of Pro. Conduct Pmbl. and scope (2021), https://www.courts.wa.gov/court_rules/pdf/RPC/GA_RPC_PREAMBLEANDSCOPE.pdf

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issues (using generalized services like ChatGPT)—will strain existing UPL frameworks, ethical frameworks, court capability, and enforcement capacity. The establishment of a Washington Supreme Court Board to address these issues would assure accountability and continuity. Without an institutional successor to the Task Force, the oversight of critical regulatory concerns surrounding the ever-evolving landscape of legal technology would be left to chance.

A Supreme Court-affiliated Board would provide authoritative guidance and continuity, effectively bridging court rulemaking, regulatory reform, and bar governance to ensure responsible innovation. The Washington Supreme Court's Practice of Law Board (POLB) has demonstrated capacity to work through complex regulatory issues and could be a suitable home for this work. However, this would require expanding its charter under GR 25 to explicitly include technology-related oversight and regulatory innovation and ensuring it had the requisite technological expertise and support.

Advocating for the Washington Supreme Court to create this Board—or for expanding scope of the POLB—aligns directly with WSBA's strategic priorities, including championing justice, fostering inclusion, and supporting professional excellence, and reflects broader national trends of proactive judicial and bar association leadership in regulatory innovation.

Establishing such a Board would proactively position Washington as a national leader, balancing technological innovation with robust consumer protection and regulatory clarity.

RECOMMENDATION

A **Petition for a Dedicated Technology Oversight Board or Expanded Practice of Law Board**

Mandate: The WSBA should petition the Washington Supreme Court to establish a Board for Legal Technology and Regulatory Innovation or broaden the scope of the Practice of Law Board with the following mission/goals:

- To collaborate with the WSBA, the Supreme Court, and other relevant stakeholders to develop rules, education, and policies supporting responsible regulatory reform and innovation.
- To ensure the profession and court system is equipped to continue to ensure the just and fair rule of law.
- To ensure that all legal technology innovations align with the legal profession's core values—integrity, public service, and administration of justice.

WASHINGTON STATE
BAR ASSOCIATION

Looking Forward

These ten key points focus less on narrow practices and more on capacity building, ethics, and education for a reason. The technology interface with law is rapidly evolving, and it is far too important to be stuffed into a static set of recommendations and left in a drawer.

The WSBA, the courts, and the profession will need to develop new abilities to handle technology changes and harmonize them with one of the most human processes in society—the way we deliver legal services to people across the state. As officers of the Court, we have the obligation not just to individual clients but to the system of justice and rule of law.

Lawyering is not just a learned profession, but a learning profession. We will find ways to learn, adapt, and excel in this changing environment. But doing so demands we are informed, intentional, and forward-looking about how technologies and the profession will dovetail to create improved results for Washingtonians—and that we leave no one behind. As the legal profession navigates technological change, we must recognize our unique role in shaping how these tools impact society. Legal professionals have a special responsibility to safeguard justice and ensure legal systems remain fair, transparent, and accountable. This means staying informed about and engaged with broader societal concerns—from environmental impact to algorithmic bias, from privacy protection to access. While AI will inevitably transform how legal work happens, our fundamental obligation is to ensure it does so in ways that strengthen rather than undermine the rule of law. By being deliberate in understanding how these technologies interact with societal values and institutional structures, we can help ensure they enhance rather than diminish access to justice and the quality of legal services for all.

A NOTE FROM THE TASK FORCE

In developing this report, the Task Force drafters worked iteratively with advancing versions of three main generative AI tools:

- ChatGPT (from OpenAI),
- Claude (from Anthropic), and
- CoPilot (from Microsoft).

In addition, the Task Force drafters benefited from help from Clearbrief (from Clearbrief.ai) in structuring and writing references. The Task Force members used these systems as a collaborative tool to support—rather than replace—the core work of legal analysis, strategic framing, and writing. The drafters provided subject-matter expertise, policy direction, legal analysis, editorial judgment, and extensive human-based research, while the generative AI tools served as responsive assistants—generating initial drafts, offering structural suggestions, surfacing alternative phrasings, and helping identify gaps or ambiguities. At every stage, decisions about content, tone, and framing remained firmly in human hands, and all information generated by the AI tools was reviewed for accuracy by Task Force members. This process reflects the approach the Task Force recommends for legal professionals: thoughtful, professional-led use of AI that enhances human capability without displacing professional responsibility, creativity, or control.

WASHINGTON STATE
BAR ASSOCIATION

WSBA Legal Technology Task Force

Report and Recommendations



Embracing Change: Strategic Roadmap for Washington's Legal Profession

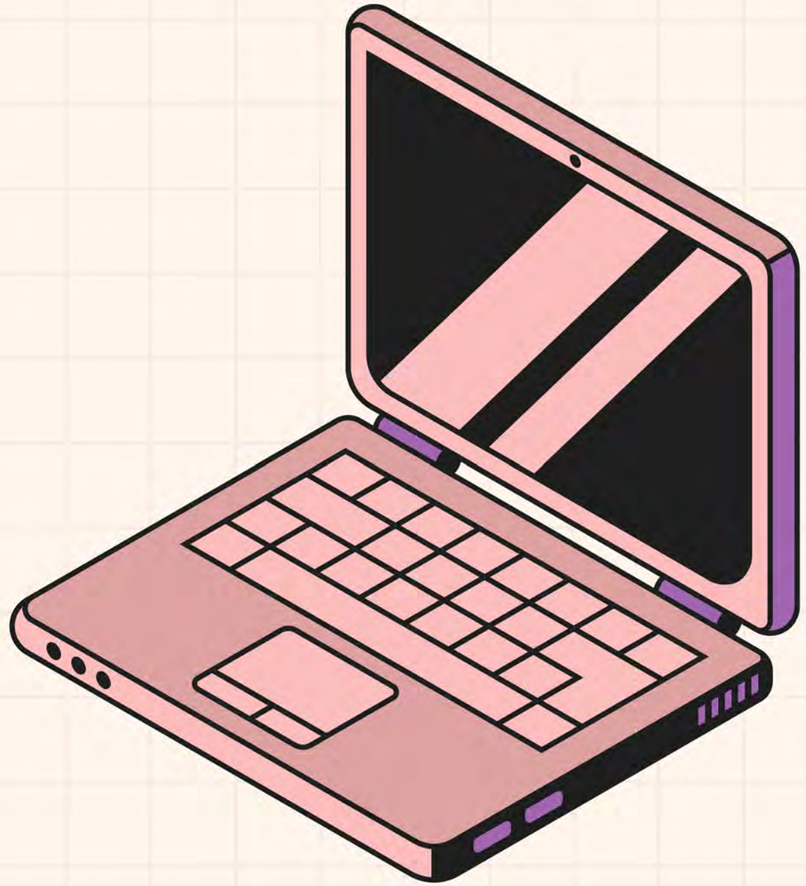
September 26, 2026

EXECUTIVE SUMMARY

Purpose: Support legal professionals in adopting emerging technologies.

K**ey Findings**: 10 Key Points covering AI, ethics, education, access, and regulation.

Recommendations: Tailored actions for WSBA, courts, law schools, and practitioners.



TASK FORCE BACKGROUND

Why This Report Was Created:
Technology is transforming the profession. WSBA must lead in supporting ethical, effective, and equitable adoption of tools like AI.

Task Force Goals:

- Assess opportunities and challenges posed by legal technology.
- Support members in building competence.
- Promote access to justice and public protection.

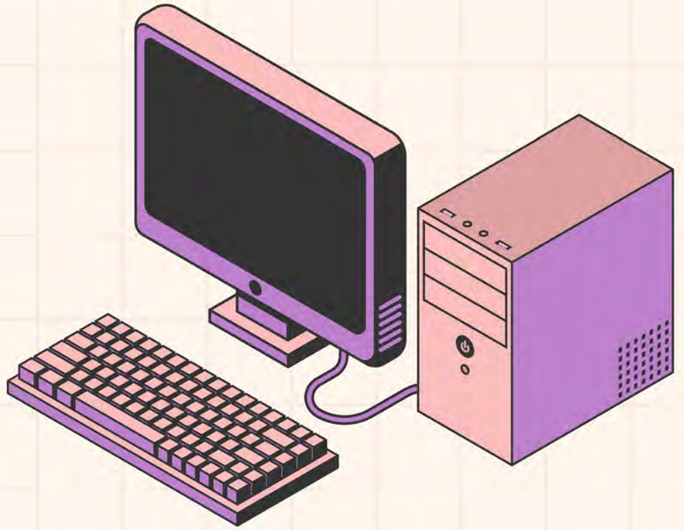
Scope:

- Focused on Washington's legal professionals, courts, and institutions.
- Includes AI, cybersecurity, education, and regulatory innovation.
- Does not prescribe specific tools—emphasizes frameworks and capacity-building.

KEY FINDINGS OVERVIEW
10 KEY POINTS

The Task Force identified 10 strategic areas for action, from practitioner competence to regulatory oversight.

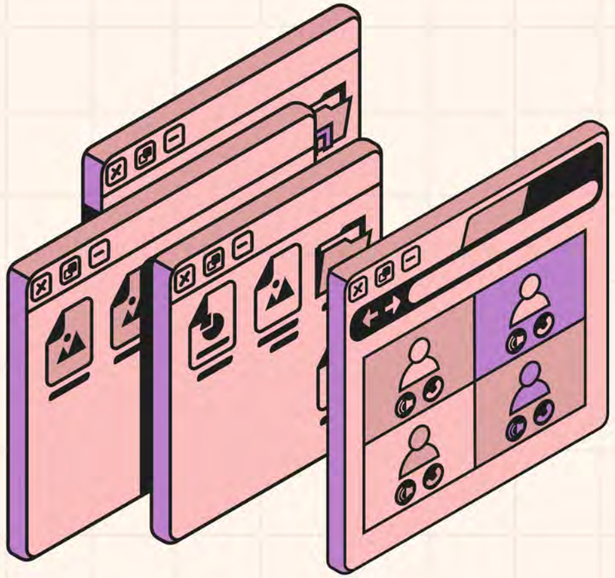
Each includes findings and recommendations.



KEY POINT 1

HARNESSING POTENTIAL: THE ROLE OF PRACTITIONERS

Legal professionals must proactively build their understanding of emerging technologies, especially AI.



Recommendations:

- Build foundational AI and tech competence
- Start small and learn fast
- Use simple, practical resources
- Collaborate with peers
- Stay curious and flexible

KEY POINT 2

BUILDING WSBA'S CAPACITY & STRATEGIC PARTNERSHIPS: INNOVATING RESPONSIBLY

WSBA must invest in internal capacity and external partnerships to support members through rapid technological change.

Recommendations:

- Develop a core curriculum
- Launch hands-on workshops and showcase
- Establish tech expertise and mentorship
- Create a centralized resource hub
- Expand discount network
- Form a tech implementation workgroup

KEY POINT 3

SUPPORTING TECHNOLOGY COMPETENCE: MEETING DIVERSE PRACTICE NEEDS

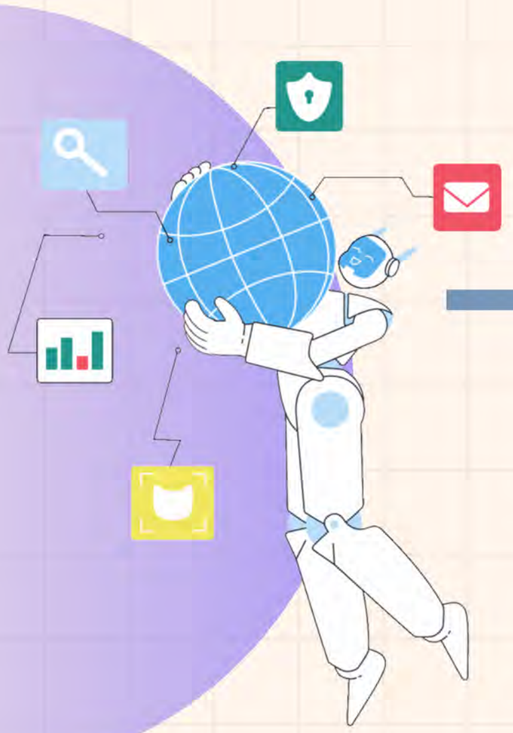
Technology competence is essential, but members' needs vary widely.



Recommendations:

- Offer free/low-cost education and consultations
- Expand advanced programming and certifications
- Recommend a tech-focused MCLE requirement
- Explore adding tech to the bar exam

KEY POINT 4



BUILDING ETHICAL FRAMEWORKS FOR TECHNOLOGY USE: SUPPORTING PROFESSIONAL VALUES IN A DIGITAL AGE

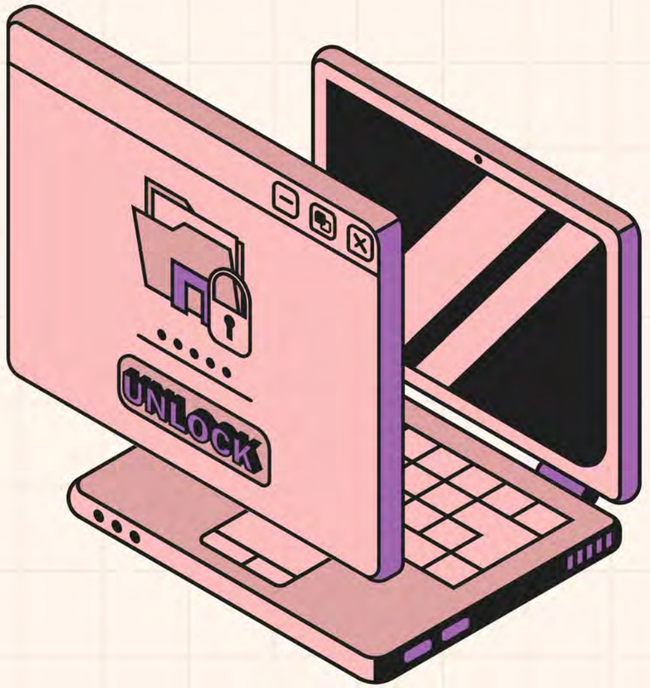
Legal professionals need practical tools—not just rules—to ethically implement new technologies.

Recommendations:

- Define baseline ethical standards
- Publish clear, practical ethics guidance
- Create an ethical evaluation framework

KEY POINT 5

BRIDGING THE CYBERSECURITY CONFIDENCE GAP: FROM CONFIDENCE TO COMPETENCE



Confidence in cybersecurity is high, but implementation is inconsistent.

Recommendations:

- Establish clear cybersecurity standards
- Provide affordable assessments
- Expand training and support
- Promote transparency with clients

KEY POINT 6.1

STRENGTHENING COURT CAPACITY: ADVANCING JUSTICE THROUGH DIGITAL TRANSFORMATION



Adapting courts to rapid technology change.

Recommendations:

- Train court personnel on AI and tech
- Upgrade courtroom technology
- Update rules on electronic evidence
- Implement AI detection tools
- Enhance language access
- Simplify court forms and filings

KEY POINT 6.2

STRENGTHENING COURT CAPACITY: ADVANCING JUSTICE THROUGH DIGITAL TRANSFORMATION

Modernizing fragmented, outdated court data infrastructure to improve efficiency and access.

Recommendation:

- Advocate for a standardized, modern statewide court data infrastructure fully funded by the State



KEY POINT 7

SUPPORTING FUTURE PROFESSIONALS: TRANSFORMING LEGAL EDUCATION FOR THE DIGITAL ERA

Law schools must embed technology across curricula.



Recommendations:

- Foster a tech-conscious culture
- Maintain a practice-ready curriculum
- Assess student progress
- Support faculty development
- Promote tech-law careers and mentorship

KEY POINT 8

ADVANCING ETHICAL INNOVATION AND EQUITABLE ACCESS: LEVERAGING AI TO CLOSE THE JUSTICE GAP



AI tools can expand access to justice—if used ethically.

Recommendations:

- Establish ethical boundaries for AI legal tools
- Expand court-based AI resources
- Promote public AI literacy
- Train legal professionals on inclusive AI
- Support affordable, scalable tools

KEY POINT 9

SAFEGUARDING SENSITIVE LEGAL DATA: STRENGTHENING CONSUMER PROTECTION IN A DIGITAL ERA

Legal data is highly sensitive and must be protected.

Recommendations:

- Advocate for updated consumer protection and privacy laws
- Prohibit sale/sharing of sensitive data
- Develop a certification/seal for legal tech
- Educate professionals on AI-related consumer risks



KEY POINT 10

ENSURING REGULATORY INNOVATION AND STABILITY: FUTURE EXPERTISE AND OVERSIGHT

Rapid tech change requires dedicated oversight.

Recommendation:

- Petition the WA Supreme Court to establish a Board for Legal Technology and Regulatory Innovation or expand the Practice of Law Board's mandate

RECOMMENDED NEXT STEPS

BOG accepts the report of the Task Force

BOG works with relevant WSBA Staff to Review and Adopt Recommendations

Implement recommendations through phased planning and coordination with a BOG established implementation workgroup

Engage stakeholders across sectors

Monitor progress and adapt

ACKNOWLEDGMENTS

Chair
- Jenny Durkan

WSBA Staff Liaisons
- Kevin Plachy
- Margeaux Green

WSBA Members
- Michele Carney
- Laura Lemire
- Nicholas Pleasants
- Kenneth Zigler

Former BOG President
- Patrick Palace

Public Members
- Kirk Arthur
- Drew Simshaw

Adjudicative Members
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- Judge Christon Skinner

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- Stephanie Ewubajo
- Rosie Midget
- Sharon Rogers
- Wyatt Young

THANK YOU!

AI Disclosure: This slide deck was generated in part and edited with Microsoft Copilot's AI and reviewed for accuracy by Margeaux Green.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Kevin J. Fay, BOG Legislative Committee Chair; Sanjay Walvekar, WSBA Legislative Affairs Manager

DATE: September 4, 2025

RE: Revised Legislation and Rulemaking Comment Policy

ACTION: APPROVE REVISED LEGISLATION AND RULEMAKING COMMENT POLICY

In response to the changing risk assessment of the Bar's legislative activity, WSBA staff provided the BOG's Legislative Committee with a revised legislation and rulemaking comment policy ("Policy"). The BOG's Legislative Committee met on June 23, 2025 to review the Policy, and voted unanimously to approve the Policy, subject to two editorial amendments dealing with the authorization of comments by Bar entities.

The Policy places the responsibility of legal risk analysis with the BOG's Legislative Committee, rather than with individual section executive committees; clarifies the concept of technical advice and provides examples of permissible technical comments; and consolidates four existing WSBA policies (1501-1504) into one policy applying to comments on legislation and court rules.

The revised Policy reflects the Legislative Committee's risk assessment around WSBA legislative activities. The Legislative Committee endorses the revised Policy for further consideration and approval by the Board of Governors.

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

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 recommendations are primarily limited to the amount of staff time used to incorporate the approved policy to relevant records, communication of the policy to Bar entities, and development and hosting an annual training. 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. If the annual training is hosted in-person, there may be costs associated with a live event, such as reimbursement for travel costs for attendees (mileage, parking, etc.), food, and supplies. Costs are dependent upon the number of attendees and options for remote participation. Reimbursements will be made in accordance with WSBA Fiscal Policies and Procedures, which outline current dollar limits for reimbursements.

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 analyses is to understand how entities incorporated an equity lens into proposed action items presented to the Board of Governors. Applying an equity lens includes 1) identifying and centering people and communities most impacted decisions and/or 2) meeting people and communities according to their specific needs to produce fair and equal outcomes for all. Based on our review, there do not appear to be concerns with inequitable outcomes. Potentially impacted people include communities affected by potential legislation and members of WSBA entities who engage in legislative activity. Procedurally, it appears that the Legislative Committee has regularly sought input from the WSBA entities engaged in legislative activity. Substantively, the policy does not impact WSBA's role in working towards equity within its roles outlined in General 12 and germaneness principles outlined in case law.

Attachments

1501 Legislation and Rulemaking Comment Policy (2025 edits)

WASHINGTON STATE
BAR ASSOCIATION

1501 Legislation and Rulemaking Comment Policy

Adopted: Month D, YYYY.

Purpose

The purpose of this policy is (1) to ensure WSBA adheres to germaneness principles as articulated in *Keller v. State Bar of California*, 496 U.S. 1 (1990), and subsequent caselaw, and Washington Court General Rule 12.2 when commenting on legislation and other rulemaking matters; and (2) to provide a process for granting authority for Bar entities to provide comments on legislative and rulemaking matters.

Bar entities are components of WSBA and, therefore, when members of Bar entities speak in their capacity as members of a Bar entity, they are bound by the same legal requirements as WSBA as a whole. In addition, WSBA typically strives to communicate about legislation or rulemaking with a unified voice. Consequently, WSBA's Bylaws provide that no Bar entity or member of a Bar entity may speak for or represent the Bar or any Bar entity before any legislative body, court, or other tribunal without prior authorization from the WSBA Board of Governors.[1] This policy sets forth the conditions and process under which the Board may grant authorization for Bar entities to comment on legislation or rulemaking.

Policy

The Board of Governors may authorize Bar entities to comment on legislation or rulemaking if,

1. The subject of the legislation or rulemaking is within the scope of permissible Bar activities under GR 12.2 and other legal requirements applicable to Bar activities; and
2. A three-quarters supermajority of the total membership of the entity's governing body has voted to support the entity's proposed position on the legislation or rulemaking.

Authority to comment on legislation or rulemaking will not be granted to Bar entities seeking to communicate comments on legislation or rulemaking that are in conflict with prior decisions of the Board of Governors or Board Legislative Committee.

The Board of Governors delegates authority to the Board's Legislative Committee to consider Bar entity requests to comment on legislation and rulemaking.

When granting authority to comment, the Board or Legislative Committee may limit the content or manner of the comment.

Entities may not join or affiliate with or endorse positions of groups or associations whose legislative advocacy reaches beyond the areas allowable under GR 12 or other legal requirements applicable to Bar activities.

Entities Covered

This policy applies to all Bar entities working under the authority of the Bar, no matter how named. Bar entities include, but are not necessarily limited to, WSBA sections, committees, councils, task forces,

[1] *See* WSBA Bylaws, Art. IV.E

workgroups, and panels. Subcommittees or other subsets of Bar entities may not communicate comments on proposed legislation or court rules.

This policy does not apply to entities created by court rule.

As used in this policy, a Bar entity's governing body refers to section executive committees or, for entities without a membership separate from their decision-making body, to the members appointed to that decision-making body.

Activities Covered

This policy applies when Bar entities seek to comment on pending legislation or rulemaking in the Bar entities' own name. Legislation and rulemaking, as used in this policy, refers to Washington and federal legislation, court rule proposals, executive orders, and administrative rulemaking. Entities are not permitted to comment on local or municipal policies, legislation, or rulemaking.

Commenting refers to communicating a position, such as by supporting, opposing, or raising concerns, on existing legislation or rulemaking pending before a policymaking body. Commenting does not refer to the development of new legislative or rule proposals by Bar entities, sometimes referred to as "WSBA-request legislation."

This policy does not apply to:

1. Bar entity requests for the WSBA Board of Governors to adopt, sponsor, or communicate a position on legislation or rulemaking in WSBA's name.
2. Responses by members of a Bar entity to questions posed by lawmakers directly to the Bar entity in which the lawmaker seeks the advice of entity members as subject matter experts. When responding to such questions, Bar entity members must indicate that they are communicating in their individual capacities and are not speaking on behalf of WSBA.

Annual Training

Training on how to implement this policy will be provided annually by the WSBA staff to Bar entities. Any Section intending to participate in the legislative process must have a designee of the Section's Executive Committee attend the annual training. Other section executive committee members and members of other Bar entities are welcome and encouraged to attend. Such training should include how to accomplish Section goals and how to act responsibly in the legislative setting.

The Legislative Affairs Manager shall be made available to Section Executive Committees as a resource for any questions as a Section works on a matter in accordance with this Policy. Each Section and the Legislative Affairs Manager will work cooperatively to establish a process to assist each Section's Executive Committee in the development of and consideration of any comment. Similarly, Sections should be a resource to the WSBA on legislative matters within a Section's subject area.

Procedure

Entities are encouraged to identify legislative and rulemaking issues within their areas of expertise. The Legislative Affairs Manager will also identify legislation and rulemaking that may be within an entity's expertise and will keep the entity apprised of the progress of the proposed policies.

Entities must seek authorization from the Board of Governors' Legislative Committee prior to communicating comments on a legislative matter. An entity contemplating commenting on legislation or rulemaking should inform the Legislative Affairs Manager of their intention as soon as possible. However, entities must inform the Legislative Affairs Manager and the chair of the Board's Legislative Committee within three days of any vote taken in which three-quarters of the entity's governing body votes to approve comments on legislation or rulemaking.

The Legislative Affairs Manager will coordinate with the entity to present the entity proposal to the Board's Legislative Committee. The Legislative Committee will consider whether the subject of the legislation or rulemaking is within the scope of permissible Bar activities under GR 12.2 and other legal requirements applicable to Bar activities. If the subject matter of the legislation or rulemaking is not within the scope of permissible Bar activities, the Committee may nonetheless consider whether the comments the entity seeks to offer are nonetheless within the scope of Bar activities because the comments are limited solely to the technical nature of the legislation. Such technical advice may be permissible if the effect of the comments is to improve the quality of legal services by providing insight regarding how a law or rule will be used by legal practitioners in practice; identifying drafting issues, such as typographical errors, mis-citations of statutes or other rules, or ambiguities; or identifying possible conflicts with other laws or rules. If the Committee grants authority to offer technical comments on legislation or rulemaking, the entity may not take a position to either support or oppose the policy.

If an entity wishes to testify regarding legislation or rulemaking, the entity must notify the Legislative Affairs Manager at least 24 hours in advance of the public hearing on the proposed legislation or rule. The entity may do nothing more until the Legislative Affairs Manager gives permission to testify or to move forward with the position being taken by the entity; permission may be given either verbally or in writing. The Legislative Affairs Manager will bring the matter to the Board's Legislative Committee for direction on how to proceed if there is time. However, if there is not time to obtain such approval, the Legislative Affairs Manager will make the decision, erring on the side of approving the request to testify or to move forward with the entity's position, unless there is a good and articulable reason to deny the request, which shall be explained to the entity. The Legislative Affairs Manager will notify the Board's Legislative Committee of the decision as soon as possible thereafter.

Each entity is responsible for advising the Legislative Affairs Manager, on an ongoing basis, regarding decisions, comments, and actions of the entity regarding legislative matters. The entity shall advise the Legislative Affairs Manager of any proposed action intended to communicate its comments on legislation in advance of taking such action. Unless otherwise authorized by the Board of Governors or the Board of Governors Legislative Committee, the entity shall follow the advice, guidance, and recommendations of the Legislative Affairs Manager in taking any action.

In all cases, the entity representatives shall cease to publicly communicate the comments of the entity if requested to do so by the Executive Director, the Board of Governors, Board of Governors Legislative Committee, WSBA President, or Legislative Affairs Manager.

CLIENT PROTECTION FUND



Trustees' Annual Report: Fiscal Year 2024

LAWYERS' INDEMNITY FUND, EST. 1960 | CLIENT PROTECTION FUND, EST. 1994

WASHINGTON STATE BAR ASSOCIATION
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PURPOSE OF THE CLIENT PROTECTION FUND

"The purpose of this rule is to create a Client Protection Fund (CPF), to be maintained and administered as a trust by the Washington State Bar Association (WSBA), in order to promote public confidence in the administration of justice and the integrity of the legal profession. [...] Funds accruing and appropriated to the CPF may be used for the purpose of relieving or mitigating a pecuniary loss sustained by any person by reason of the dishonesty of, or failure to account for money or property entrusted to, any member of the WSBA as a result of or directly related to the member's practice of law (as defined in GR 24), or while acting as a fiduciary in a matter directly related to the member's practice of law. Such funds may also, through the CPF, be used to relieve or mitigate like losses sustained by persons by reason of similar acts of an individual who was at one time a member of the WSBA but who was at the time of the act complained of under a court ordered suspension."

Admission and Practice Rules 15(a) and (b).

FY 2024 TRUSTEES

WSBA Board of Governors (2023-2024)

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Sunitha Anjilvel, *President-Elect*	Redmond
Daniel Clark, *Past President*	Yakima
Francis Adewale	Spokane
Tom Ahearne	Seattle
Todd Bloom	Port Orchard
Jordan Couch	University Place
Matthew Dresden	Seattle
Kevin Fay	Bellevue
Kristina Larry	Tukwila
Nam Nguyen	Olympia
Kari Petrasek	Mukilteo
Mary Rathbone	Ephrata
Serena Sayani	Seattle
Allison Widney	Oklahoma
Brent Williams-Ruth	Federal Way

FY 2024 CLIENT PROTECTION BOARD

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Luis Beltrán	Tacoma
Andrew Benjamin	Seattle
Mackenzie Bretz	Bothell
Carla Higginson	Friday Harbor
Efrem Krisher	Bellevue
Dana Laverty	Covington
Sarah Moen	Seattle
Mark Stiefel	Kirkland
Ruthanna Walker	Renton
Brandon West	Spokane
Kathy Yue	Newcastle

WSBA STAFF TO CLIENT PROTECTION BOARD

Nicole Gustine	Assistant General Counsel; CPF Liaison/Secretary
Brenda Jackson	CPF Specialist

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APPENDIX

FY 2024 Final Audited Income and Expense Report
and Sept. 30, 2024, CPF Balance Sheet (Audited) 17

SECTION I

History and Establishment of the Client Protection Fund

Washington is fortunate to have a history of maintaining a stable Client Protection Fund (CPF) that is strongly supported by the Washington Supreme Court and the Washington State Bar Association (WSBA). Washington was one of the first states to establish what was then called a Lawyers' Indemnity Fund in 1960. Since that time, WSBA members have compensated victims of the few dishonest members who have misappropriated or failed to account for client funds or property.

The current CPF was established by the Washington Supreme Court in 1994 at the request of the WSBA by the adoption of **Rule 15** of the Admission to Practice Rules (APR), now called the Admission and Practice Rules. Prior to the adoption of that rule, the WSBA had voluntarily maintained a clients' security or indemnity fund out of the Bar's general fund. Similar funds are maintained in every jurisdiction in the United States, as well as Canada, Australia, New Zealand, and other countries.

The CPF helps accomplish important goals shared by the Court and the WSBA — client protection, public confidence in the administration of justice, and maintaining the integrity of the legal profession. Under APR 15, CPF payments are gifts, not entitlements. An annual assessment from certain members licensed in Washington finances all CPF gifts. Gifts are not financed by public funds.

On November 21, 2022, the Court approved the BOG's recommendation to reduce the CPF assessment for the 2024 calendar year from $20 to $15. On January 4, 2024, the Court approved the BOG's recommendation to increase the CPF assessment for the 2025 calendar year from $15 to $20.

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) pay an annual assessment to the CPF. The following chart shows the experience of the past 10 years.

CLIENT PROTECTION FUND APPLICATIONS 2015-2024

FISCAL YEAR	NO. OF MEMBERS	NO. OF MEMBERS WITH APPROVED APPLICATIONS*	NO. OF APPLICATIONS RECEIVED	NO. OF APPLICATIONS APPROVED	GIFTS APPROVED
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
2024	33,600	13	165	25	$436,328

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

SECTION II

Fund Procedures

The CPF is governed by **Admission and Practice Rule (APR) 15** and **CPF (APR 15) Procedural Regulations** adopted by the Board of Governors and approved by the Supreme Court.

> **Administration:** The members of the Board of Governors of the WSBA serve during their terms of office as Trustees for the CPF. The Trustees appoint and oversee the Board, comprised of 11 lawyers and two community representatives. This Board has the authorization to consider all CPF claims, make CPF reports and recommendations to the Trustees, submit an annual report on Board activities to the Trustees, and make such other reports and publicize Board activities as the Court or the Trustees may deem advisable. Two WSBA staff members help the Board ensure the smooth functioning of its work. WSBA Client Protection Fund Analyst Brenda Jackson performs a wide variety of tasks to help members of the public and the Board in the processing and analyzing of CPF claims. WSBA Assistant General Counsel Nicole Gustine acts as WSBA staff liaison to the Board, provides legal advice to the Board, and serves as Secretary to the Board.

> **Application:** Clients of WSBA members that allege a dishonest taking of, or failure to account for, funds or property by a WSBA member, in connection with that member's practice of law, can apply for a gift from the CPF. To be eligible, clients must file a disciplinary grievance against the member, unless the member has resigned in lieu of discipline; is disbarred, or deceased. Because most applications involve members who are the subject of disciplinary grievances and proceedings,action on CPF applications normally awaits resolution of the disciplinary process.[1] This means that most applicants must wait for the discipline process to be complete before the Board reviews their application. However, to increase efficiency in the application process, applications are reviewed based on the date the grievance was filed (if applicable). Otherwise, an application is processed and reviewed in the order of receipt.

> **Eligibility:** To be eligible for payment, an applicant must show by a clear preponderance of the evidence that they has suffered a loss of money or property through the dishonest acts of, or failure to account by, a WSBA member. Dishonesty includes, in addition to theft, embezzlement, and conversion, the refusal to return unearned fees as required by Rule 1.16 of the Rules of Professional Conduct.

> ***The CPF is not available to compensate for member malpractice or professional negligence. It also cannot compensate for loan, investment, or other business transactions unrelated to the member's practice of law.***

When an application is received, it is initially reviewed to determine whether it appears eligible for recovery from the CPF. If the application is ineligible on its face, the applicant is advised of the reasons for its ineligibility. If the application passes the initial intake process and appears staff potentially eligible for payment, CPF staff investigates the application. When the application is ripe for consideration by the Board, a report and recommendation is prepared by CPF staff.

> **Board and Trustee Review:** For applications less than $25,000, or where the recommendation for payment is less than $25,000, the Board's decision is final. The Trustees review all Board recommendations

CONTINUED >

1. APR 15 Regulation 6(h). In addition, Rule 3.4(i) of the Rules for Enforcement of Lawyer Conduct (ELC) provides that otherwise confidential information obtained during the course of a disciplinary investigation may be released to the CPF concerning applications pending before it. Such information is to be treated as confidential by the Board and Trustees.

SECTION II

Fund Procedures

CONTINUED >

on applications seeking more than $25,000, where the recommendation is to pay more than $25,000, or when the total payments regarding one licensed legal professional, are more than $25,000.

The maximum gift amount is $150,000. There is no limit on the aggregate amount that may be paid on claims regarding a single member. Any payments from the CPF are gifts and are at the sole discretion of the Client Protection Board and Trustees.

> **Legal Fees:** Members may not charge a fee for assisting with an application to the CPF, except with the consent and approval of the Trustees.

> **Assignment of Rights and Restitution:** As part of accepting a gift from the CPF, applicants are required to sign a subrogation agreement for the gift. The CPF attempts to recover its payments from the members or former members on whose behalf gifts are made, when possible; however, recovery is generally successful only when it is a condition of a criminal sentencing, or when a member petitions for reinstatement to the Bar after disbarment.[2] To date, the CPF (and its predecessors) has recovered approximately $617,228.

> **Difficult Claims:** One of the more difficult claim areas for the Board and Trustees involves fees paid to a member for which questionable service was performed. The Board is not in a position to evaluate the quality of services provided, or to determine whether the fee charged was reasonable, therefore, an application may be denied as a fee dispute. (The denial may also include other bases, such as malpractice or negligence.) However, where it appears that there is a pattern of conduct which establishes that a member knew or should have known at the time the member accepted fees from a client that the member would be unable to perform the service for which they were employed, or the member simply performs no service of value to the client, and does not return unearned fees, the Board has concluded that such conduct may be either dishonesty or failure to account within the context of the purposes of the CPF, and will consider such applications. Similarly, if a member withdraws from representing a client or abandons a client's case without refunding any unearned fee, the Board may conclude that the member has engaged in dishonest conduct or has failed to account for client funds.

Another difficult claim area concerns loans or investments made to or through members. In instances where there is an existing client/LLP relationship through which the member learns of their client's financial information, persuades the client to loan money or to invest with the member without complying with the disclosure and other requirements of RPC 1.8,[3] and does not return the client's funds as agreed, the Board may consider that a dishonest act for purposes of the CPF.

2. Admission and Practice Rule 25.1(d) provides that no disbarred lawyer may petition for reinstatement until amounts paid by the CPF to indemnify against losses caused by the conduct of the disbarred lawyer have been repaid to the CPF, or a payment agreement has been reached.

3. In relevant part, RPC 1.8 provides:

(a) A lawyer shall not enter into a business transaction with a client or knowingly acquire an ownership, possessory, security or other pecuniary interest adverse to a client unless:

(1) the transaction and terms on which the member acquires the interest are fair and reasonable to the client and are fully disclosed and transmitted in writing in a manner that can be reasonably understood by the client;

(2) the client is advised in writing of the desirability of seeking and is given a reasonable opportunity to seek the advice of independent legal counsel on the transaction; and

(3) the client gives informed consent, in a writing signed by the client, to the essential terms of the transaction and the lawyer's role in the transaction, including whether the lawyer is representing the client in the transaction.

(b) A member shall not use information relating to representation of a client to the disadvantage of the client unless the client gives informed consent, expect as permitted or required by these Rules.

SECTION III

Finances

The CPF is financed by an assessment as described in Section II: CPF Procedures. The CPF is maintained as a trust, separate from other funds of the WSBA. In addition, interest on those funds accrues to the CPF, and any restitution paid by members is added to the CPF balance. The CPF is self-sustaining; administrative costs of the CPF, such as Board expenses and WSBA staff support, are paid from the CPF.

FISCAL YEAR	PENDING APPLICATIONS AT START OF FY	CPF BEGINNING BALANCE[4]	CPF REVENUES RECEIVED	BOARD EXPENSES AND OVERHEAD[5]	RESTITUTION RECEIVED	GIFTS RECOGNIZED FOR PAYMENT
2015	$1,229,864	$1,746,010	$990,037	$90,315	$3,703	$490,357
2016	$13,203,653	$2,144,289	$1,001,198	$129,553	$2,970	$371,452[6]
2017	$1,463,914	$2,646,222	$1,024,954	$113,672	$3,709	$318,584
2018	$2,045,175	$3,242,299	$1,040,498	$166,969	$28,255	$917,051[7]
2019	$3,206,880	$3,227,988	$1,110,963	$146,618	$8,347	$379,818
2020	$3,342,227	$3,816,143	$1,099,237	$141,514	$15,351	$591,449[8]
2021	$4,690,958	$4,193,130	$368,170	$151,055	$137,971	$499,637
2022	$4,252,961	$4,046,246	$740,321	$162,100	$8,906	$587,815
2023	$1,583,390	$4,063,501	$961,358	$173,059	$9,177	$342,424
2024	$5,094,587	$4,513,398	$816,420	$180,831	$27,839	$436,328

4. It is important for the CPF to maintain a sufficient balance to meet anticipated future needs. It is impossible to predict from year to year how many meritorious claims injured applicants will make.
5. Board expenses and overhead include WSBA staff time to administer the CPF, including processing of applications, helping members of the public, investigating claims, and making recommendations to the Board.
6. The amount of gifts recognized in the FY 2016 financial statements overstates by $115,000 due to a duplicate recording of approved gifts, correct in FY 2017. This explains the substantial difference between the amounts listed for FY 2016 and FY 2017 under this column as compared with the "Gifts Approved" column on page 1.
7. The amount of gifts recognized in the FY 2018 financial statements understates by $9,383 due to unclaimed CPF gifts that expired in FY 2018.
8. The amount of gifts recognized in the FY 2020 financial statements overstates by $5,183, due to interest owed to an applicant and a payment voided in FY 2021. This explains the difference between the amounts listed for FY 2020 under this column as compared with the "Gifts Approved" column on page 1.

SECTION IV

Board and Trustee Meetings and Activities

Board: The Client Protection Board met four times this past fiscal year:

- November 6, 2023;
- February 5, 2024;
- May 6, 2024, and
- August 5, 2024.

The Board considered 42 applications to the CPF involving 28 members and approved 25 applications involving 13 members.

Fund Trustees: The Trustees reviewed the Board's recommendations on applications for more than $25,000, or for payment of more than $25,000, and approved the 2023 Annual Report for submission to the Supreme Court pursuant to APR 15(g).

PUBLIC INFORMATION

The Client Protection Fund maintains a website at: https://www.wsba.org/Legal-Community/Committees-Boards-and-Other-Groups/Client-Protection-Board that provides information about the CPF, its procedures, and a downloadable application form.

< SCAN TO LEARN MORE

SECTION V

Applications and Payments

At the beginning of FY 2024, there were 108 pending applications to the CPF. During FY 2024, the CPF received 165 additional applications. The Board and Trustees acted on 42 applications concerning 28 lawyers and approved 25 applications concerning 13 lawyers. The total amount in approved payments is $436,328.

Applications Denied in FY 2024

Application denials are for reasons such as fee disputes, no evidence of dishonesty, alleged malpractice, restitution already paid in full, no attorney client relationship, and other reasons.

17

Applications Approved for Payment in FY 2024

Applications approved for payment arose from the member's dishonest acts such as theft or conversion, failure to return or account for unearned legal fees, and investments or loans with members.

25

APPLICATIONS IN DETAIL

Applications Pending as of October 1, 2024	108[9]
Applications Received During FY 2024	165
Applications Acted Upon by Board and Trustees	42
Applications Carried Over to FY 2025	231

APPROVED APPLICATIONS

ATTORNEY	NO. OF APPLICATIONS APPROVED	DOLLAR AMOUNT OF APPLICATIONS APPROVED*	PAGE NUMBER
Behrends, Clinton, WSBA #45371	2	$179,217	7
Brooks, Emily, WSBA #49013	1	$115,000	7
Enriquez, Credo, WSBA #28921	1	$10,000	8
Fay, Nicholas, WSBA #47603	1	$14,000	8
Furness, Matthew, WSBA #43649	1	$6,600	8-9
Graham, Michael, WSBA #37391	1	$39,732	9
Hawkins, Dave, WSBA #23064	5	$9,845	10-11
Homsher, Frank, WSBA #26935	2	$4,159	11-12
Jakeman, David, WSBA #39332	7	$36,150	12-14
Mills, Scott, WSBA #48548	1	$3,750	14
Peterson, Tyler, WSBA #39816	1	$6,875	15
Pitner, Noel, WSBA #36158	1	$1,000	15
Taylor-Manning, Robert, WSBA #21890	1	$10,000	15-16
TOTALS	**25**	**$436,328**	

**Rounded to the nearest dollar*

9. Applications received or pending are still in investigation, not yet ripe, or temporarily stayed. All approved applications receive initial payments of up to $5,000, with the balance reserved for possible proration against 75% of the CPF balance at fiscal year-end.

SECTION V

The following summarizes the gifts and recommendations made by the Board:

ATTORNEY

CLINTON BEHRENDS

WSBA #45371 – RESIGNED IN LIEU OF DISCIPLINE

APPLICANT: 23-024	DECISION: **$79,166.67**

In August 2017, Applicant hired Behrends to represent her late husband in a personal injury matter on a contingent fee basis. From February to November of 2018, Applicant wrote Behrends checks totaling $32,500, for fees and services Behrends said were needed for the case. In the summer of 2018, Behrends obtained a $78,000 settlement on behalf of Applicant's husband, earning a contingent fee of $25,974. Applicant met Behrends at the bank to sign the $78,000 settlement check, which he instructed should be held in trust until all parts of the case were settled. Thereafter, Behrends gave Applicant many excuses as to the delay in issuing the proceeds of the settlement. In July 2020, Applicant learned that Behrends resigned in lieu of discipline. Behrends never informed Applicant of his resignation and continued to lead her to believe he was still practicing law. Applicant sought recovery of the $32,500 that Behrends stole from her, and the proceeds of her deceased husband's settlement.

The Board approved a gift of $79,166.67.

APPLICANT: 24-008	DECISION: **$100,050**

In April 2019, Applicant hired Behrends to represent her in a personal injury matter on a contingent fee basis. In June 2019, Behrends obtained a $150,000 settlement on Applicant's behalf, earning a contingent fee of $49,950. Thereafter, Behrends made excuses for the delay in distributing the proceeds of Applicant's settlement. Applicant grew suspicious when medical bills were sent to collections. Behrends admitted to mishandling funds and claimed he was trying to get a loan to pay it back. Applicant later discovered that Behrends resigned in lieu of discipline and was charged with insurance fraud by the Washington State Insurance Commissioner's Office.

The Board approved a gift of $100,050.

ATTORNEY

EMILY BROOKS

WSBA #49013 – DECEASED

APPLICANT: 24-028	DECISION: **$115,000**

In February 2021, Applicant retained Brooks to represent him in the purchase of a Washington State Tier 3 cannabis producer and processor license. In June 2021, Applicant deposited $30,000 of earnest money with Brooks. In April 2023, Applicant negotiated a final price for the license and deposited $50,000 with Brooks. In July 2023, Applicant completed the transfer of the license to his name and location. Applicant instructed Brooks to transfer the $80,000 to the seller. Applicant gave Brooks a cashier's check for $120,000 to complete the purchase. He told her to wait 30 days to make sure the license was in Applicant's name, and to obtain final approval from the Washington Liquor and Cannabis Board. In August 2023, Applicant instructed Brooks to make the final payment to the seller's lawyer. In September 2023, Applicant received a letter from the seller's lawyer demanding the final payment of $120,000. Brooks admitted to converting the funds to her own use and sent a partial refund of $5,000.

The Board approved a gift of $115,000.

SECTION V

The following summarizes the gifts and recommendations made by the Board:

ATTORNEY

CREDO ENRIQUEZ

WSBA #28921 – DISBARRED

APPLICANT: 23-005	DECISION: $10,000

In June 2013, Applicant hired Enriquez to represent her and her daughter in their immigration matters, paying $10,000. Applicant states that she and Enriquez met to work on her case. Applicant's brother-in-law accompanied her to the meetings for translating purposes. Due to miscommunication between them, Enriquez instructed Applicant's brother-in-law to stop attending the meetings. Enriquez brought in a translator, charging Applicant $500 for each visit. Applicant believes the translating services contributed to errors in her case statements, which Enriquez sent to immigration without checking. Although Applicant and Enriquez met to work on her case, it does not appear to have resulted in any work of value.

The Board approved a gift of $10,000.

ATTORNEY

NICHOLAS FAY

WSBA #47603 – DISBARRED

APPLICANT: 23-006	DECISION: $14,000

In July 2018, Applicant hired Fay to represent her in a litigation matter, paying $14,000. Fay and Applicant met on several occasions and communicated by phone and email exchanges. Thereafter, communication was sparse, and it became difficult for Applicant to communicate with Fay. Fay sent Applicant an email stating that he had not forgotten about her, that he would be working on her case that weekend, and that he would provide an update. That was the last time Applicant heard from Fay. In January 2022, Applicant terminated representation and requested a refund of the unearned $14,000 fee. Fay never performed any work in Applicant's matter, nor did he issue a refund.

The Board approved a gift of $14,000.

ATTORNEY

MATTHEW FURNESS

WSBA #43649 – SUSPENDED

APPLICANT: 24-007	DECISION: $6,600

In February 2018, Applicant hired Furness to represent him in an immigration matter, paying $6,600. Furness filed an I-589 asylum application on Applicant's behalf and filed a motion for continuance of a June hearing date, since he needed more time to prepare. Applicant's family posted a $20,000 bond, and Applicant was released from custody to travel to Houston, Texas, to live with his brother. Most of Applicant's communication with Furness was through Applicant's brother, due to language barriers. Applicant's brother sent a text to Furness to remind him to file a motion to transfer Applicant's case from Atlanta to Houston. Meanwhile, the court denied Furness's motion to continue the June hearing. Applicant's brother called Furness to ask if Applicant needed to return to Atlanta for the hearing. Furness advised that the June hearing would be stricken and rescheduled for a later date, but he did not explain the consequences of Applicant's failure to appear for the immigration hearing. On June 4, 2018, Furness filed a motion to

CONTINUED >

SECTION V

The following summarizes the gifts and recommendations made by the Board:

ATTORNEY

MATTHEW FURNESS

WSBA #43649 – SUSPENDED

APPLICANT: 24-007	DECISION: **$6,600**

change venue and a motion for telephonic appearance. The court denied both motions. Neither Furness nor Applicant attended the hearing, resulting in the court ordering Applicant's removal. The court deemed the I-589 application abandoned and forfeited Applicant's $20,000 bond. The court mailed the order of removal to Furness, but Furness did not inform Applicant of the outcome of the June 4 hearing. Furness filed a motion to reopen, arguing that the Department of Homeland Security failed to notify the court of Applicant's release from custody. The court denied the motion to reopen, stating that Applicant received proper notice of the hearing. Furness filed an appeal of the denial of the motion to reopen with the Board of Immigration Appeals (BIA). The appeal was denied, but the case was reopened. Applicant was granted asylum, and his $20,000 bond was returned. In Furness's response to the claim filed against him, he stated that he intends on fulfilling his financial obligations under the Stipulation to Suspension approved by the Disciplinary Board.

The Board approved a gift of $6,600.

ATTORNEY

MICHAEL GRAHAM

WSBA #37391 – DISBARRED

APPLICANT: 22-012	DECISION: **$39,732.08**

In January 2020, Applicant hired Graham to represent her in a worker's compensation claim. Graham's fee agreement entitled him to ten percent of time-loss payments while the claim was opened, and twenty percent of retroactive or other types of compensation. Graham notified Labor & Industries (L&I) that he represented Applicant and was an authorized delegate. Thereafter, L&I sent all correspondence and payments to Graham's law firm, Gauntlet Law. In February 2021, Graham received an L&I time-loss payment to Applicant for $55,053.39, earning $5,505.34. Graham did not deposit the proceeds of $49,548.05 into his trust account. Graham issued Applicant a check from his trust account for $47,132.13. This payment was short $2,415.92. Thereafter, from May to June 2021, Graham received L&I payments for Applicant totaling $46,645.20, earning $9,329.04. Graham did not deposit the proceeds of $37,316.16 into his trust account and did not distribute any of the proceeds to Applicant. Graham converted the funds for his own use. Applicant filed a WSBA grievance. Graham signed a stipulation to disbarment which orders restitution of $37,316.16 to Applicant. In addition to the restitution ordered in the Stipulation to Disbarment, Graham also owes Applicant a balance of $2,415.92 from the first time-loss payment.

The Board approved a gift of $39,732.08.

SECTION V

The following summarizes the gifts and recommendations made by the Board:

ATTORNEY

DAVE HAWKINS

WSBA #23064 – DECEASED

APPLICANT: 20-003	DECISION: $1,000

In July 2019, Applicant hired Hawkins to represent him in a family law matter, paying a flat fee of $1,000. Soon after, it became difficult for Applicant and opposing counsel to communicate with Hawkins. Applicant sent Hawkins emails and received auto replies stating that Hawkins was in the hospital or in court. Hawkins set meetings with Applicant at his office, but then failed to attend. Hawkins failed to keep Applicant informed about his case. Applicant was often informed by the opposing party. Hawkins failed to appear at mediation and a default hearing, resulting in the court entering an order of default, a final parenting plan, and a child support order. Hawkins performed no work of value and did not return the unearned fees.

The Board approved a gift of $1,000.

APPLICANT: 20-012	DECISION: $2,000

In August 2019, Applicant hired Hawkins to represent her in a family law matter, paying $1,500. Applicant paid an additional $500 for the court reporter for a deposition. The deposition never happened. Applicant terminated Hawkins's representation and requested a refund of the unearned fees. Hawkins told Applicant that he would send a billing statement within 30 days and would send a refund. Hawkins did not send the billing statement, performed no work of value, and did not return the unearned fees.

The Board approved a gift of $2,000.

APPLICANT: 21-028	DECISION: $2,620

In September 2019, Applicant hired Hawkins to represent her in an immigration matter, paying $2,620 to file for an O-1B Visa. The fee included a premium processing and Visa fee of $1,870 and an attorney's fee of $750. A few days after Hawkins received the payment, he was hospitalized. Hawkins informed Applicant by email, claiming that he would file the petition for the O-1B Visa immediately upon his release. Hawkins never filed the petition. After waiting a year, Applicant filed a WSBA grievance. Hawkins performed no work of value, and did not return the unearned fees.

The Board approved a gift of $2,620.

APPLICANT: 21-034	DECISION: $2,225

In March 2019, Applicant hired Hawkins to represent him in an immigration matter, paying $2,225. Thereafter, Hawkins became difficult to contact When Applicant terminated the representation, Hawkins sent Applicant a letter acknowledging the termination and enclosed immigration documents. Hawkins stated that he would send a billing statement, refund any unearned fees, and send a check for filing fees. However, Hawkins never followed through and performed no work of value.

The Board approved a gift of $2,225.

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SECTION V

The following summarizes the gifts and recommendations made by the Board:

ATTORNEY

DAVE HAWKINS

WSBA #23064 – DECEASED

APPLICANT: 22-031	DECISION: **$1,000**

In October 2016, Applicant hired Hawkins to represent her in a family law matter, paying a flat fee of $2,000. Applicant met with Hawkins and was given a list of things she needed to do for her case. Applicant was prepared to move forward with her case but was unable to reach Hawkins. Applicant sent Hawkins several emails but received out of office replies, including one stating that Hawkins was hospitalized. Applicant's father called Hawkins's office and cell phone, but both lines were disconnected. Applicant eventually hired new counsel to move her case forward. Hawkins performed no work of value and did not return the unearned fees. Applicant only had proof of a $1,000 payment she made to Hawkins.

The Board approved a gift of $1,000.

ATTORNEY

FRANK HOMSHER

WSBA #26935 – RESIGNED IN LIEU OF DISCIPLINE

APPLICANT: 23-020	DECISION: **$1,500**

In October 2021, Applicants hired Homsher to represent them in a litigation matter, paying $1,500. Applicants state that Homsher's legal assistant was their only point of contact. After nine months, the legal assistant informed Applicants that they did not have a case to keep them in their rental property. Applicants reminded the legal assistant that Homsher was not hired for eviction, he was only hired to litigate for compensation against the landlord's estate. Thereafter, Homsher's office said they would serve the opposing party in the lawsuit, but no one was ever served. In April 2023, Homsher informed Applicants of his two-year suspension from practicing law. He said that he would try to get the opposing party served, making it easier for them to find new counsel. Applicants did not have money to pay for new counsel. Homsher told Applicants he was willing to return $1,500 to resolve the matter. Homsher performed no work of value, and Applicants never received the refund.

The Board approved a gift of $1,500.

APPLICANT: 23-037	DECISION: **$2,659.44**

In October 2021, Applicant hired Homsher to represent her in a property damage dispute, paying $2,659.44. Applicant and her neighbors were involved in a property damages dispute when the neighbors hired a service to cut down trees along a shared property line, without Applicant's permission. Applicant also claimed that construction performed on the neighbor's property damaged multiple trees on her property. Homsher filed the complaint for damages, suing the neighbors, the tree service, and the construction company. In February 2022, Homsher was served with interrogatories, requests for production, and requests for admission. Applicant had 30 days to respond. Homsher asked his paralegal to assist Applicant with the response. The paralegal never contacted Applicant and Homsher never followed-up on the discovery requests. Throughout the

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SECTION V

The following summarizes the gifts and recommendations made by the Board:

ATTORNEY

FRANK HOMSHER

WSBA #26935 – RESIGNED IN LIEU OF DISCIPLINE

APPLICANT: 23-037	DECISION: **$2,659.44**

remainder of the representation, Homsher gave Applicant and the opposing parties false information on work performed, and misrepresentations about the case. In June 2022, without Applicant's knowledge, Homsher told the opposing lawyers that Applicant agreed to sign a dismissal with prejudice. Applicant never agreed to dismiss any claims, yet Homsher signed the stipulated orders of dismissal with prejudice. The court entered the orders. Thereafter, Applicant, who was still unaware of Homsher's actions, maintained that she wanted him to pursue the timber trespass claim, and to communicate her position to the opposing lawyers. Applicant did not become aware of the dismissal until after terminating representation. Homsher informed Applicant that he would be withdrawing from the matter due to an alleged conflict of interest, after Applicant criticized his representation. Subsequently, Applicant requested a refund and warned Homsher that she would file a WSBA grievance if he did not pay. Homsher told Applicant that her threat was illegal extortion, and that he would send the email to the police to have her prosecuted. Finally, Homsher offered a refund if Applicant withdrew the grievance and dropped a credit card dispute Applicant had initiated regarding Homsher's charges. Applicant did not accept Homsher's offer. In August 2022, the court dismissed with prejudice all claims in Applicant's action. During the grievance investigation, the Office of Disciplinary Counsel (ODC) requested a complete copy of Applicant's client file. The client file contained no discovery requests for any opposing parties.

The Board approved a gift of $2,659.44.

ATTORNEY

DAVID JAKEMAN

WSBA #39332 – RESIGNED IN LIEU OF DISCIPLINE

APPLICANT: 21-058	DECISION: **$3,600**

In April 2015, Applicant hired Jakeman to represent him in an immigration matter, paying $5,400. Jakeman told Applicant that he would be able to help him with his case. Applicant mailed Jakeman the documents needed to complete immigration applications. Jakeman lead Applicant to believe he was performing work on his matter, so Applicant continued to make payments as agreed. Applicant received a letter from Beacon Immigration, informing him of Jakeman's office bankruptcy and closure. Jakeman performed no work of value and did not issue a refund of unearned fees. Applicant provided proof of payment in the amount of $3,600.

The Board approved a gift of $3,600.

APPLICANT: 21-072	DECISION: **$11,000**

In April 2018, Applicant hired Jakeman to represent her in an immigration matter, paying $11,000. It became difficult for Applicant to reach Jakeman. Applicant went to Jakeman's office to make a payment and to discuss an upcoming hearing date. However, she could

CONTINUED >

SECTION V

The following summarizes the gifts and recommendations made by the Board:

ATTORNEY

DAVID JAKEMAN

WSBA #39332 – RESIGNED IN LIEU OF DISCIPLINE

APPLICANT: 21-072	DECISION: **$11,000**

not make a payment or discuss the hearing, because the office was closed. Applicant sent emails to Jakeman's office to request a refund and her client file, with no return response. Applicant appeared at her hearing without representation. She never heard from Jakeman again.

The Board approved a gift of $11,000.

APPLICANT: 21-083	DECISION: **$7,950**

In November 2018, Applicant hired Jakeman to represent him in an immigration matter, paying $15,050. In November 2020, Applicant received a letter from Jakeman's office regarding its bankruptcy and office closure. Applicant sent Jakeman emails requesting a refund of the unearned fee. Jakeman was unable to issue refunds to his clients. Applicant provided proof of payment in the amount of $7,950.

The Board approved a gift of $7,950.

APPLICANT: 21-100	DECISION: **$500.00**

In July 2020, Applicant hired Jakeman to represent her in an immigration matter, paying $500. Applicant mailed Jakeman the documents needed to complete immigration applications. However, she did not receive a notice of receipt. Thereafter, Applicant received a letter from Beacon Immigration, informing her of its bankruptcy and closure. Jakeman performed no work of value and did not return the unearned fee.

The Board approved a gift of $500.00.

APPLICANT: 21-101	DECISION: **$4,500**

In October 2019, Applicant hired Jakeman to represent him in an immigration matter, paying $6,000. Applicant was previously represented by another attorney, who had filed his asylum application (Form I-589). Jakeman filed an application for employment authorization, and in March 2020, Applicant received his employment authorization documents. Jakeman did not perform any additional work on the pending asylum application. Jakeman failed to appear at Applicant's individual asylum hearing in Portland Immigration Court. In October 2020, Applicant was informed of the closure of Beacon Immigration. Applicant hired new counsel to carry out the remainder of his immigration case. By his new counsel's estimate, Beacon Immigration performed $1,500 worth of services. Applicant did not receive a refund of the unearned fees.

The Board approved a gift of $4,500.

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SECTION V

The following summarizes the gifts and recommendations made by the Board:

ATTORNEY

DAVID JAKEMAN

WSBA #39332 – RESIGNED IN LIEU OF DISCIPLINE

APPLICANT: 22-004	DECISION: **$2,000**

In February 2017, Applicant hired Jakeman to represent her in an immigration matter concerning her stepson, paying $7,870. The initial work that Jakeman performed was filing an I-130 and preparing a waiver of inadmissibility. Applicant never received an update regarding the status of the application or the waiver. Applicant never received information regarding the consular visit, interview, medical appointments, or fingerprints. When Applicant received the letter regarding Jakeman's office closure, she reached out to another law firm for assistance. Although Applicant could not afford to retain the law firm, they were helpful in providing the information she needed to move forward. Applicant provided of proof payment in the amount of $2,000.

The Board approved a gift of $2,000.

APPLICANT: 22-022	DECISION: **$6,600**

In September of 2019, Applicant hired Jakeman to represent her in an immigration matter, paying $6,600 of an agreed flat fee of $12,000. Jakeman filed a Form I-589 application for Asylum on behalf of Applicant. However, the form lacked details about Applicant's claim and was not supported by a detailed declaration or other evidence. Jakeman performed no other work of value. Applicant hired new counsel to complete the work on her case. According to new counsel, Jakeman's work was "bare bones." Jakeman did not return the unearned fee.

The Board approved a gift of $6,600.

ATTORNEY

SCOTT MILLS

WSBA #48548 – VOLUNTARILY RESIGNED

APPLICANT: 22-023	DECISION: **$3,750**

In July 2017, Applicant hired Mills to represent him in an immigration matter, paying $5,000. The representation covered the filing of the initial application documents, representation at the asylum interview, and petition for residency for Applicant and his family. Applicant paid an initial $1,000 to start the case. After getting his Employment Authorization, Applicant paid monthly payments of $100, to cover the remaining $4,000. August 2020 was the last communication Applicant had with Mills. Thereafter, Applicant left several voicemails with no return response. Applicant later discovered that Mills resigned from the WSBA. Mills earned $1,250 of the fees for obtaining Applicant's Employment Authorization and filing the asylum application.

The Board approved a gift of $3,750.

SECTION V

The following summarizes the gifts and recommendations made by the Board:

ATTORNEY

TYLER PETERSON

WSBA #39816 – DECEASED

APPLICANT: 24-024	DECISION: $6,875

In November 2020, Applicant hired Peterson to represent him in a litigation matter, paying $6,875. At the time, Peterson was a partner at Peterson Baker Law. In December 2020, Peterson left his firm to work for Savitt Bruce and Willey LLP (SBW). Peterson died on August 22, 2021. Shortly after Peterson's death, Applicant learned that the funds he paid into the Peterson Baker Law trust account were missing. In a Peterson Baker trust account statement, it lists, "withdrawal from Trust Transfer to SBW" for $6,875. Applicant reached out to both law firms to recover his funds. In his communication with SBW, Applicant learned that Peterson never deposited his funds into their trust account. Peterson handled all of the financial aspects of the Peterson Baker firm, including the trust accounts. Therefore, his former partner had no knowledge of Applicant's funds, but assumes Peterson withdrew the funds and did not deposit them into his new firm's trust account.

The Board approved a gift of $6,875.

ATTORNEY

NOEL PITNER

WSBA #36158 – DISBARRED

APPLICANT: 23-001	DECISION: $1,000

In March 2017, Applicant hired Pitner to represent him in filing bankruptcy, paying $1,000. Applicant later discovered that no work was being performed on his bankruptcy and made several attempts to contact Pitner for a refund, with no return response. In December 2021, Applicant was informed of Pitner's disbarment and discovered that he could seek relief from the CPF.

The Board approved a gift of $1,000.

ATTORNEY

ROBERT TAYLOR-MANNING

WSBA #21890 – DISBARRED

APPLICANT: 23-038	DECISION: $10,000

In September 2022, Applicant and his wife hired Taylor-Manning for estate planning, paying $10,000. Applicants noticed problems with Taylor-Manning's representation. Payment receipts and important documents listed Applicant's names incorrectly. Taylor-Manning sent the Applicants what should have been an updated Quit Claim Deed. Applicants took the Quit Claim Deed to the Benton County Treasurer's Office, where they were told that the document was worthless because Applicant's wife's name was misspelled. When Applicants pointed out the errors, Taylor-Manning refused to correct his mistakes. Thereafter, Taylor-Manning became difficult to contact. Applicants went to Taylor-Manning's office. They could see that he was in the office, but the doors were locked, and he refused to answer. Taylor-Manning later contacted Applicants to apologize for his behavior and told them he would do better. During that call, he told Applicants

CONTINUED >

SECTION V

The following summarizes the gifts and recommendations made by the Board:

ATTORNEY

ROBERT TAYLOR-MANNING

WSBA #21890 – DISBARRED

APPLICANT: 23-038	DECISION: **$10,000**

that he would meet them at their home in Benton City, WA, to finish the estate planning. Taylor-Manning did not show. Applicant requested an itemized statement of services, but Taylor-Manning never provided one. Taylor-Manning performed no work of value and did not return the unearned fee.

The Board approved a gift of $10,000.

APPENDIX

CPF Balance Sheet

STATEMENT OF FINANCIAL POSITION

ASSETS

Audited as of September 30, 2024

Checking Account	$1,261,232
Accrued Interest Receivable	$36,985
Money Market	$2,062,164
Investments	$2,230,748
TOTAL ASSETS	**$5,591,129**

LIABILITIES AND NET ASSETS

Approved gifts to injured clients payable	$646,449
Liability to WSBA general fund	$185,327
Net Assets	$4,759,353
TOTAL LIABILITIES AND NET ASSETS	**$5,591,129**

STATEMENT OF FINANCIAL POSITION

REVENUE

Audited As of September 30, 2024

Restitution	$27,839
Member Assessment	$548,235
Interest	$268,185
TOTAL REVENUE	**$844,259**

EXPENSES

Misc.	($3,210)
Gifts to Injured Clients	$418,710
CPF Board	$887
Staff Membership Dues	$200
Indirect (overhead)	$181,718
TOTAL EXPENSE	**$598,305**
Net Income (Expense)	$245,954

STATEMENT OF CHANGES IN NET ASSETS

Balance on September 30, 2023	$4,513,398
Net Income as of September 30, 2024	$245,954
BALANCE ON SEPTEMBER 30, 2024	**$4,759,352**

WASHINGTON STATE BAR ASSOCIATION
1325 Fourth Avenue, Suite 600, Seattle, WA 98101-2539
206.727.8200 | www.wsba.org

WASHINGTON STATE BAR FOUNDATION

To: WSBA Board of Governors

From: Brian J. Anderson, President

Re: 2025-26 Board of Trustees Appointments

Date: August 22, 2025

The Washington State Bar Foundation Board is pleased to present the proposed 2025-26 Board of Trustees roster.

The Washington State Bar Foundation is the fundraising arm of the WSBA. The current members of the WSBA Board of Governors constitute the membership of the Foundation. Per the Foundation's Bylaws, the WSBA Executive Director serves as the Foundation's Secretary ex officio, the WSBA Immediate Past President serves as a trustee ex-officio, and the WSBA President each year appoints a first year Governor to serve a three-year term on the Foundation Board. The remaining seats are recommended by the Foundation Board and appointed by the Board of Governors, convened as the members of the Foundation.

The Foundation Board has approved a slate that includes the trustees listed on the following page.

Attachments:

- Proposed roster

WASHINGTON STATE BAR FOUNDATION

2025-2026 Board of Trustees, Recommendation

POSITION	RECOMMENDATION	TERM, ending
WSBA 1st Year Governor	*Appointed by 2025-2026 BOG President* TBD	September 2028
WSBA 2nd Year Governor	*Appointed by 2024-2025 BOG President* Jordan Couch	September 2027
WSBA 3rd Year Governor	*Appointed by 2023-2024 BOG President* Kristina Larry	September 2026
WSBA Past President or Governor	Tracy S. Flood, Treasurer	2nd Regular Term, September 2026
WSBA Member	Brian Anderson, President	1st Term, September 2026
WSBA Member	Peter Finch	2nd Regular Term, September 2026
WSBA Member	Maya Manus	September 2026*
WSBA Member	***Vacant***	1st Term, September 2028
Affinity/Specialty Bar Rep.	Deb Wechselblatt	2nd Regular Term, September 2027
Law Student	***Vacant***	Graduation
Public Member	Lucretia Robertson	1st Term, September 2026
Public Member	***Vacant***	Remainder, September 2026
At Large	Carolyn Powers	September 2028
At Large	Rajeev Majumdar, Vice President	2nd Term, September 2027
At Large	Kristine Kuenzli	2nd Term, September 2026
WSBA Immediate Past President	Sunitha Anjilvel	September 2026, serves Ex-Officio
WSBA Executive Director	Terra Nevitt, Secretary	Executive Director serves Ex-Officio

*Per the Bylaws (Article III, Section 3) - the student Trustee is eligible to serve one additional three-year term if duly elected to fill another Trustee position

WASHINGTON STATE BAR FOUNDATION

To: WSBA Board of Governors

From: Brian J. Anderson, President

Re: Proposed Amendments to the Washington State Bar Foundation Bylaws

Date: August 22, 2025

ACTION REQUESTED: Approve the proposed amendments to the Washington State Bar Foundation (WSBF) Bylaws as approved by the WSBF Board of Trustees on August 22, 2025

The Washington State Bar Foundation is the fundraising arm of the WSBA. Its mission is to raise funds to support WSBA programs that increase diversity in the legal profession and improve the public's access to, and understanding of, the legal system. The current members of the Board of Governors constitute the membership of the Foundation.

The Foundation Board has approved proposed revisions to the WSBF Bylaws which, in addition to minor text edits, include:

- Updating the definition of quorum to align with the BOG definition
- Removing redundant text
- Defining term limits more clearly
- Removing outdated text
- Clarifying details around vice presidents
- More clearly defining board terms and ability to return to the board
- Clarifying and aligning scheduled reports to the Board of Governors to avoid duplicative reports
- Updating Treasurer responsibilities to reflect new internal procedures

BYLAWS OF THE
WASHINGTON STATE BAR FOUNDATION
As Amended September 26, ~~2019~~2025

ARTICLE I. PURPOSE

The Washington State Bar Foundation is a charitable corporation organized pursuant to the provisions of Section 501(c)(3) of the Internal Revenue Code of 1986. The purpose of the Foundation is to raise funds to support programs of the Washington State Bar Association that promote diversity within the legal profession and enhance the public's access to and understanding of the justice system.

ARTICLE II. MEMBERSHIP

Section 1. Members. The membership of the Washington State Bar Foundation (Foundation) shall consist solely of the members of the Board of Governors of the Washington State Bar Association (WSBA) during their term in office.

Section 2. Annual Meeting. The annual meeting of the Foundation Members shall be held in conjunction with the Board of Governors' last regularly scheduled meeting of the fiscal year.

Section 3. Special Meetings. Special meetings of the Members may be called by the President or the Secretary of the Foundation, or upon the written request of five Members.

Section 4. Notice of Special Meetings. Notice of a special meeting shall set forth the time, place and purpose thereof, and shall be given to all Members at least five ~~(5)~~ days prior to the meeting. The five days' notice requirement may be waived by written consent of a majority of Members. Attendance at the special meeting constitutes waiver of notice of that meeting, except for the purpose of objecting to the meeting.

Section 5. Voting Rights. Each Member shall be entitled to one vote with respect to the subject matter of an issue submitted to the Members.

Section 6. Quorum. The presence of ~~half of the~~ a majority of the voting Membership ~~plus one~~ shall constitute a quorum for the purpose of conducting Foundation business, except that fewer than that number may adjourn from day to day.

Commented [LS1]: This is to mirror the current BOG definition of a quorum.

ARTICLE III. BOARD OF TRUSTEES

Section 1. Powers and Qualifications. The affairs of the Foundation shall be managed by the Board of Trustees, who shall be elected by the Members.

Section 2. Number. There shall be ~~fifteen (~~15~~)~~ Trustees, except in the event of an officer's term being extended per Article III Section 3 of these Bylaws, of which three ~~(3)~~ shall be Governors of the Washington State Bar Association selected by the WSBA President (one first year governor each year), one ~~(1)~~ shall be a past president or governor of the WSBA, four ~~(4)~~ shall be active, inactive or emeritus members in good standing of the WSBA, one ~~(1)~~ shall be a representative of a Washington ~~minority~~ affinity or specialty bar association, one ~~(1)~~ shall be a student from a Washington law school who has completed at least one year of law school, two ~~(2)~~ shall be non-lawyers, and three ~~(3)~~ shall be "at large" and may be lawyers or non-lawyers.

The Immediate Past President and the Executive Director of the WSBA shall serve ex-officio, non-voting.

Section 3. Election and Term. Except for the Immediate Past WSBA President who serves ex~~-~~officio, the Trustees shall be elected by the Members at the annual meeting of the Foundation or at a special meeting called for that purpose. Nominees for each vacant position except the positions to be filled by Governors shall be submitted to the Members by the Board of Trustees at least ~~ten (~~10~~)~~ days in advance of the Members' meeting. ~~–~~Except for a Trustee elected to fill an ~~uncompleted~~ unexpired term, the term for each Trustee shall be three years ~~or until a successor is elected, whichever occurs later~~. Trustees may be elected to two consecutive three-year terms, except that an Officer duly elected by the Board may serve an additional year. A Trustee who has served for two consecutive full three-year terms will be eligible for re-election after one full fiscal year after the end of the second consecutive term. Trustees elected to fill an unexpired term where more than half of the term remains may be elected to one additional consecutive three-year term. Trustees elected to fill an unexpired term where less than half of the term remains may be elected to two additional consecutive three-year terms.

The term of the student Trustee shall be for a maximum period of four ~~(4)~~ years, so long as the student is continuously enrolled at a Washington law school. If graduation occurs during the course of a fiscal year, the law student may complete that year as a Trustee. ~~–~~ The student ~~trustee~~ Trustee is eligible to serve one additional three-year term if duly elected to fill another Trustee position.

Section 4. Removal. Any Trustee elected by the Members as provided herein may be removed by the Members whenever in their judgment the best interests of the Foundation will be served thereby. The action to remove a Trustee may be initiated by written request signed by at least ~~one-quarter~~25% of the Members. Removal may be accomplished only by action of the Members at a regular or

Commented [LS2]: Changing to percentage for consistency

special meeting and must be approved by 60% of the Members. ~~The removal of a Trustee shall be without prejudice to the contract rights, if any, of the Trustee so removed; provided, that election or appointment of a Trustee or agent shall not of itself create contract rights.~~

Commented [LS3]: This language was a holdover from the Washington Nonprofit Corporation Act and does not seem relevant to our structure.

Section 5. Vacancies. The Members shall have the power to fill any vacancy occurring on the Board of Trustees and any Trustee position to be filled by reason of an increase in the number of Trustees by amendment to these Bylaws. Such new trustee will be nominated and elected in the same manner as specified above. The Trustee elected to fill a vacancy shall be elected for the unexpired term of ~~his/her~~their predecessor in office. ~~–~~Any Trustee elected by reason of an increase in the number of Trustee positions shall serve for the term specified in the action creating such position.

Section 6. Regular Meetings. Regular meetings of the Trustees may be held at dates, times, and places approved by resolution of the Board of Trustees without notice other than such resolution.~~–~~Meetings may be held telephonically or electronically through the use of remote conferencing technologies.

Section 7. Special Meetings. Special meetings of the Trustees may be called by the President or the Secretary of the Board, or upon the written request of three ~~(3)~~ or more Trustees. Special meetings may be held telephonically or electronically through the use of remote conferencing technologies.

Section 8. Notice of Special Meetings. Notice of a special meeting shall set forth the time, place and purpose thereof, and shall be given to all Trustees at least five ~~(5)~~ days prior to the meeting. The five days' notice requirement may be waived by written consent of a majority of Trustees. Attendance at the special meeting constitutes waiver of notice of that meeting, except for the purpose of objecting to the meeting.

Section 9. Quorum and Voting. A quorum is defined in Article II, Section 6 of these Bylaws ~~The presence of half of the Trustees plus one shall constitute a quorum~~ for purposes of conducting the business of the Board, except that fewer than that number may adjourn from day to day. Actions requiring approval of the Board must be passed by a majority of those Trustees present and voting, provided that the requirement for a quorum is met, unless a different requirement is specified in these Bylaws.

ARTICLE IV. ACTIONS BY WRITTEN CONSENT

Any corporate action required or permitted by the Articles of Incorporation, Bylaws, or laws of the State of Washington to be taken at a meeting of the Members or Trustees of the Foundation may be taken without a meeting if a consent, in writing, setting forth the action so taken shall be signed by all of the Members or Trustees

entitled to vote with respect to the subject matter thereof. The required consent may be submitted via email and such email consent shall be deemed to be signed for purposes of this article by the Member or Trustee sending the email. Such consent shall have the same force and effect as a unanimous vote and may be described as such.

ARTICLE V. WAIVER OF NOTICE

Whenever any notice is required to be given to any Member or Trustee by the Articles of Incorporation, Bylaws, or laws of the State of Washington, a waiver thereof, in writing, signed by the person or persons entitled to such notice, whether before or after the time stated therein, shall be equivalent to the giving of such notice.

ARTICLE VI. OFFICERS

Section 1. Officers Enumerated. The officers of the Foundation shall be a President, ~~one or more~~a -Vice President~~s~~, a Secretary, a Treasurer, and such other officers and assistant officers as may be deemed necessary by the Board of Trustees. Each officer, except the Secretary, shall be elected annually by the Trustees at the last regularly scheduled meeting of the prior fiscal year or at a special meeting called for that purpose. Officers shall serve until their successors are duly elected and qualified, except as provided herein. All officers, except the Secretary, must be Trustees of the Foundation. Any two or more offices may be held by the same person, except the offices of President and Secretary. In addition to the powers and duties specified below, the officers shall have such powers and perform such duties as the Board of Trustees may prescribe.

Commented [LS4]: Since the Board can add officers if they deem it necessary, it seems unnecessary to include "one or more" Vice Presidents specifically.

Section 2. The President. The President shall exercise the usual executive powers pertaining to the office of President and shall preside at meetings of the Board of Trustees and of the Members. At the annual meeting, ~~The~~ the President shall present a slate of Trustees for approval and any proposed changes to the Bylaws, and shall submit an ~~shall present an~~ annual report on the state of the Foundation to the Members ~~within ninety (90) days after the end of the fiscal year~~.

Section 3. The Vice President. In the absence or disability of the President, the ~~first~~ most senior Vice President (if more than one is in office) shall act as President.

Commented [LS5]: With the provision above that the board can add additional officers as they deem necessary, this will define which vice president presides (if there ends up being more than one).

Section 4. The Secretary. The Executive Director of the Washington State Bar Association shall serve as Secretary ex- officio, non-voting. The Secretary shall keep records of the proceedings of the Board of Trustees and of the Members; maintain a record of the duly promulgated policies of the Foundation; maintain a record of the committees of the Board, the composition of such committees and committee annual reports; issue such notices to the Trustees and Members as may be required by the Articles of Incorporation, the Bylaws, or the laws of the state of Washington; and sign and execute with the President all deeds, bonds,

contracts, and other obligations or instruments in the name of the Foundation, including establishing bank accounts, authorizing release of funds, signing the tax return, and engaging insurance carriers and other vendors, and other administrative responsibilities.

Section 5. The Treasurer. The Treasurer shall perform the usual duties incident to the office of ~~treasurer~~Treasurer. ~~He/she~~They shall cause regular books of account to be properly maintained, ~~which shall be examined on an annual basis by an employee (accountant or CPA) of WSBA who is not involved in maintaining the regular books of account~~audited annually. ~~Both t~~The maintenance of the regular books of account ~~and the examination~~ may be performed by staff of the Washington State Bar Association if the Association agrees to provide such services to the Foundation. ~~Examination~~ Audit findings shall be communicated directly to the President and the Treasurer.

The Treasurer shall cause all funds and other valuable effects of the Foundation to be deposited in such depositories as may be designated by the Board of Trustees. ~~He/she~~The Treasurer shall also submit a written annual financial report ~~in writing~~ to the Board of Trustees and the Members not later than ~~forty-five (45)~~60 days after the close of the books for ~~the~~ previous fiscal year (or at the next scheduled meeting date following that time).

Section 6. Executive Committee. The Board of Trustees may, by resolution adopted by a majority of the Trustees in office, appoint an Executive Committee, which shall consist of two or more officers. The Executive Committee shall have such authority as may be specified in said resolution; provided, that no such committee shall have the authority of the Board of Trustees in reference to amending, altering, or repealing the Bylaws; electing, appointing, or removing any member of any committee or any Trustee or officer of the Foundation; amending the Articles of Incorporation; adopting a plan of merger or a plan of consolidation with another corporation; authorizing the sale, lease, exchange, or mortgage of all or substantially all of the property and assets of the Foundation; authorizing the voluntary dissolution of the Foundation or revoking proceedings therefor; adopting a plan for the distribution of the assets of the Foundation; or amending, altering, or repealing any resolution of the Board of Trustees which by its terms provides that it shall not be amended, altered, or repealed by such committee. The designation and authority shall not operate to relieve the Board of Trustees or any individual Trustee of any responsibility imposed upon it or ~~him/her~~them by law.

Section 7. Vacancies. Vacancies in any office, except Secretary, arising from any cause shall be filled by the Board of Trustees at any regular or special meeting.

Section 8. Removal. Any officer elected or appointed, except Secretary, may be removed by the Board of Trustees whenever in its judgment the best interests of the Foundation will be served thereby. The action to remove an officer may be initiated by the President or by written request signed by at least ~~one quarter~~25%

of the Trustees. Removal may be accomplished only by action of the Board of Trustees at a regular or special meeting and must be approved by 60% of the Trustees. ~~The removal of an officer shall be without prejudice to the contract rights, if any, of the officer so removed; provided, that election or appointment of an officer or agent shall not of itself create contract rights~~.

Commented [LS6]: Same language as above, which we recommend deleting.

ARTICLE VII. COMMITTEES OF THE BOARD

Section 1. Committees Authorized. The Board of Trustees may create such committees as it deems appropriate to facilitate the work of the Foundation and delegate to such committees the authority to carry out tasks and responsibilities defined by the Board. The committees of the Board may include standing committees and task forces. Each committee shall carry out the assignments and responsibilities delegated to it by the Board of Trustees and such other duties as the committee may determine are consistent with its purpose. Each committee shall submit an annual report of its activities to the Board of Trustees and such other reports as requested by the Board or the President. A list of the current committees, the functions and members shall be maintained by the Secretary.

Section 2. Standing Committees. Standing committees are created to study, investigate and make recommendations relative to the general purposes and business of the Foundation that are of a continuous and recurring nature. The number, size and function of each standing committee shall be determined from time to time by the Board of Trustees.

Section 3. Task Forces. Task forces are created to study, investigate and make recommendations relating to specific purposes or issues that are of an immediate or non-recurring nature.

Section 4. Appointment and Terms. Appointments to standing committees shall be for a term of one year and shall be made annually by the Board of Trustees on recommendation of the President, unless stated otherwise in the provision creating the committee. The Chairperson of each committee shall be designated annually by the President. Appointments to task forces shall be on the conditions and for the terms specified in the action creating such task forces.

Section 5. Meetings of Committees. Meetings of each committee shall be held upon call of its Chairperson. The Chairperson shall be responsible for reporting the work of the committee to the Board of Trustees and for bringing to the Board any business from the committee requiring Board action.

ARTICLE VIII. POLICIES OF THE BOARD

Policies governing the operations of the Foundation; issues relating to Board service not otherwise addressed in these Bylaws; acceptance of gifts; investment, management and spending of funds; and such other matters as are required by

law or deemed appropriate by the Board of Trustees shall be promulgated as Board Policies. Board Policies shall be recommended by the President and enacted upon approval by the Board of Trustees. The Secretary shall maintain at all times a current record of Board Policies.

ARTICLE IX. INDEMNIFICATION OF TRUSTEES AND OFFICERS

Section 1. Definitions. For purposes of this Article:

A. **Indemnitee:** The term Indemnitee shall mean any person who is or was serving as a Member, officer, Trustee, employee or agent of the Foundation when acting on matters related to the Foundation or who is or was serving at the request or appointment of the Foundation as a member of any board, committee, task force, or other Foundation entity.

B. **Proceeding:** The term Proceeding shall mean any threatened, pending, or completed action or proceeding, whether civil, criminal, administrative, or investigative.

C. **Expenses:** The term Expenses shall include all liability, loss, attorneys' fees, costs, and other expenses (including penalties, judgments and amounts to be paid in settlement) reasonably incurred or suffered in connection with a Proceeding against a person by reason of his or her position as Indemnitee establishing a right to indemnification under this Article.

D. **Qualified Actions:** A qualified action is any action by a qualified Indemnitee which is taken in good faith and reasonably believed by the Indemnitee to be within the scope of his or her authority to act for or on behalf of the Foundation or in the course of his or her duties and responsibilities to the Foundation.

Section 2. Right to Indemnification and Advances. The Foundation shall provide indemnification to Indemnitees for liabilities arising out of Qualified Acts. The Foundation shall provide indemnification and pay Expenses in advance of the final disposition of a Proceeding as provided by applicable statute. An Indemnitee shall be defended, held harmless and indemnified against any and all Expenses actually and reasonably incurred in connection with a Proceeding to the full extent permitted by applicable Washington law. Rights under this Article are non-exclusive to any other rights entitled under any other statute, rule, Article, agreement, or vote of the Trustees.

Section 3. Board of Trustee Rights. The Trustees shall have the right, as a condition of granting indemnification under this Article, to approve in advance the choice of counsel as well as any settlement by the person requesting indemnification. The Board of Trustees shall not unreasonably withhold its approval.

Section 4. Insurance. The Foundation shall maintain insurance, on behalf of any Indemnitee against liability asserted against or incurred by the Indemnitee whether or not the Foundation would have the power to indemnify the Indemnitee against that liability under applicable Washington law.

Section 5. Claim for Indemnification. If indemnification is required under Section 2, an Indemnitee shall be indemnified against reasonable Expenses incurred in connection with a claim against the Foundation for payment of Expenses.

ARTICLE X. ADMINISTRATIVE PROVISIONS

Section 1. Fiscal Year. The fiscal year of the Foundation shall be October 1 through September 30.

Section 2. Loans Prohibited. No loans shall be made by the Foundation to any officer or any Trustee.

Section 3. Books and Records. The Foundation shall keep current and complete books and records of account; keep minutes of the proceedings of its Members, Board of Trustees, and committees exercising delegated authority on behalf of the Board of Trustees.

Section 4. Amendment of Bylaws. These Bylaws may be altered, amended, or repealed by the affirmative vote of a majority of a quorum of the Trustees and approved by a majority of a quorum of the Members.

Section 6. Rules of Procedure. In the event of disagreement over a procedural matter occurring in connection with any meeting or proceeding of the Members or the Trustees, the dispute shall be resolved by reference to the rules contained in Robert's Rules of Order Newly Revised, so far as applicable and when the matter cannot be resolved through reference to these Bylaws, the Articles of Incorporation or any resolution of the Board of Trustees.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Benjamin Phillabaum, Chair, Law Clerk Board
Christell Casey, Incoming Chair, Law Clerk Board
Cathy Biestek, Managing Regulatory Counsel
Katherine Skinner, Law Clerk Program Lead

DATE: August 26, 2025

RE: Suggested Amendments to APR 6 and Related Law Clerk Program Regulations

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Action: The Law Clerk Board is submitting suggested amendments to APR 6 and related Law Clerk Program Regulations for approval by the Board of Governors to submit the suggested rule amendments to the Supreme Court of Washington.

The Law Clerk Program (Program) is a four-year program designed to provide educational and practical experience through a combination of work and study with an experienced lawyer or judge. Completion of the Program qualifies the law clerk to take the Washington lawyer bar examination pursuant to the requirements under APR 3(b). During fiscal years 2024 and 2025, the program expansion committee of the Law Clerk Board (Board) considered ways to improve and expand the Program. The Board met with individuals who contacted the WSBA with suggested changes to the Program with the goal to increase program participation by potential law clerks and/or tutors, especially by those in underserved communities. On June 6, 2025, the Board voted to approve several changes to the Program in concept and designated a rules committee to draft suggested amendments to APR 6 and related Program Regulations. On August 1, 2025, the Board voted to approve and submit these suggested amendments to APR 6 and related Program Regulations to the Board of Governors for approval. If approved by the Board of Governors, the Law Clerk Board will submit the suggested amendments to APR 6 to the Supreme Court of Washington. Suggested amendments to APR 6 and related regulations approved by the Board of Governors would become effective on the effective date of any amendments to APR 6 adopted by the Court.[1]

The suggested amendments to Rule 6 of the Admission and Practice Rules (APR) and related Law Clerk Program (Program) Regulations are intended to increase participation in the Program and clarify Program requirements.

[1] On August 1, 2025, the Board voted to approve several amendments to APR 6 and the Program Regulations. Some of the proposed amendments to the Program Regulations relate to suggested amendments to APR 6 and some do not. Therefore, these amendments are being submitted to the Board of Governors via two separate requests for action and memoranda to the Board of Governors: (1) this memo requesting approval of suggested amendments to APR 6 and related Program Regulations that would become effective on the effective date of any amendments to APR 6 adopted by the Court and (2) a separate memo requesting approval of proposed amendments to Program Regulations that are consistent with APR 6 and, therefore, will be effective upon approval by the Board of Governors.

Suggested amendments to APR 6 and Related Regulations

The suggested amendments to APR 6 and related Program Regulations are described below.

Increasing the number of law clerks to tutor ratio

The Board is proposing a new provision in APR 6(c)(1) to allow up to two law clerks per tutor at a time. The Program currently allows for only one law clerk per tutor. The change would allow a primary tutor who is assigned to one law clerk to also serve as an assistant tutor for a different law clerk. Additionally, an assistant tutor would be permitted to support up to two law clerks at the same time. The suggested amendments to APR 6(d)(2) would include the following provisions for a tutor overseeing two law clerks at a time:

- A tutor supervising two clerks in the same month for the same course may combine supervision time to meet the weekly average total of 3 hours.
- A tutor supervising two clerks in different courses or different months of the same course must supervise the clerks separately for a total average of 6 hours per week (3 hours per clerk).

The Board recommends allowing tutors to work with up to two law clerks at a time in order to increase law clerk enrollment and participation in the program. While this change may place a higher burden on tutors and law clerks (due to additional time and resource management), this change is still in line with the original intent of the Program, which is to provide small-scale, one-to-one instruction alongside workplace experience. The Board acknowledges the need for additional lawyers and legal professionals in underserved communities and believes this rule amendment will be a step towards increasing assistance for legal aid organizations and law firms working with underserved communities while also retaining the integrity of law-clerk instruction and the intent of the Program.

Tutor qualifications

The Board proposes decreasing the number of years of active legal experience required for a primary tutor to 8 years out of the last 12 years in order to increase the number of lawyers and judges who would qualify to be a primary tutor and, thereby, support increased participation in the Program. Currently, the requirement is to have at least 10 of the last 12 years. The Board considered that a more seasoned lawyer may be more likely to have an established practice, broader base of legal experience and knowledge, and better ability to manage and successfully accomplish the tutoring of an employee as a law clerk. Additionally, a more recently licensed lawyer is often developing their skills and establishing their practice and may be less equipped to serve as primary tutor to a law clerk. The Board also acknowledges there may be newer lawyers able to fulfill a primary tutor role however, evaluating lawyers with less experience for eligibility would be challenging from a regulatory and oversight perspective. Therefore, the Board decided that reducing the active legal experience requirement from 10 to 8 would balance these considerations.

Additional suggested changes

Additional suggested amendments to APR 6 and related Program Regulations are intended to provide greater clarity regarding Program requirements. These changes include:

- Clarifying that an individual may not apply to the Program if at the time of submitting the application the applicant qualifies for lawyer admission under APR 3.

- Clarifying that there is a paid employment requirement for law clerks and that cannot be waived or satisfied by unpaid or contract positions.

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

The risk analysis in included in the BOG's confidential box 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 amendments includes allocation of existing indirect expenses for staff time used to incorporate the changes to WSBA records, outreach to communicate changes, and management of potential increased volume in applications and program participants. 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. It is unlikely there would be material increases to direct program expenses. In terms of impact on revenue, with an increased volume of applications and program participants, revenue is expected to rise correspondingly. The current application fee is $100, and the annual participation fee is $2,000 (amounting to $8,000 over the four-year program period). This would result in a total of $8,100 in fee revenue for each additional enrolled applicant due to the proposed amendments that could increase the number of eligible tutors and their capacity.

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

This equity analysis was conducted using the materials from both proposed actions related to the APR 6 program submitted by the Law Clerk Board for this meeting.

The proposed rule changes will increase the pool of qualified APR 6 tutors and make it possible for tutors to collaborate to supervise multiple APR 6 clerks simultaneously. Ultimately, these rule changes have the potential for an indirect, net positive impact on diversity and inclusion in the profession by reducing barriers to being able to take on an APR 6 clerk, while still maintaining a baseline level of experience required to do so.

Attachments

1. Suggested Amendments to APR 6 – Mark-up Copy
2. Suggested amendments to related Law Clerk Program Regulations – Mark-Up Copy
3. Suggested amendments to APR 6 – Clean Copy
4. Suggested amendments to related Law Clerk Program Regulations – Clean Copy

APR 6
LAW CLERK PROGRAM

(a) [Unchanged.]

(b) Application. Every applicant for enrollment in the law clerk program shall:

(1) [Unchanged.]

(2) [Unchanged.]

(3) Be engaged in regular, full-time, paid employment in Washington State for an average of 32 hours per week with the primary tutor or primary tutor's employer in a (i) law office, (ii) legal department, or (iii) court of general, limited, or appellate jurisdiction in Washington State. This paid employment requirement shall not be waived or satisfied by unpaid or contract positions. The employment must include tasks and duties which contribute to the practical aspects of engaging in the practice of law;

(4) – (8) [Unchanged.]

(9) Not be eligible to apply if, at the time of submitting the application, the applicant qualifies for admission as a lawyer under APR 3;

(c) Tutors. To be eligible to act as a tutor in the law clerk program, a lawyer or judicial member as defined in the Washington State Bar Association Bylaws, shall:

(1) Act as a tutor for ~~only one~~no more than two law clerks ~~at a time~~concurrently;

(2) [Unchanged.]

(3) Have active legal experience in the practice of law as defined by APR 1 or have held the required judicial position for at least ~~10~~8 of the last 12 years immediately preceding the filing of the law clerks application for enrollment. The ~~10~~8 years of practice must include at least 2 years in Washington state and may be a combination of active practice and judicial experience but may not include periods of suspension for any reason;

(4) –(5) [Unchanged.]

(d) Enrollment. When an application for enrollment has been approved by the Bar, an enrolled law clerk shall:

(1) [Unchanged.]

(2) Meet the minimum monthly requirements of an average of 32 hours per week of regular, full-time, paid employment with the tutor which may include in-office study time and must include an average of 3 hours per week for the tutor's personal supervision of the law clerk. A tutor supervising two clerks in the same month for the same course may combine supervision time to meet the weekly average total of 3 hours. A tutor supervising

two clerks in different courses or different months of the same course must supervise the clerks separately for a total average of 6 hours per week (3 hours per clerk). "Personal supervision" is defined as time actually spent with the law clerk for the exposition and discussion of the law, the recitation of cases, and the critical analysis of the law clerk's written assignments.

(3) – (4) [Unchanged.]

(e) Course of Study. The subjects to be studied, the sequence in which they are to be studied, and any other requirement to successfully complete the program shall be as prescribed in the Law Clerk Program Regulations. Progress toward completion of the program shall be evaluated by submission of examinations, certificates, reports and evaluations as follows:

(1) [Unchanged.]

(2) *Certificates*. Within 10 days following the month of study, the law clerk or tutor shall submit the examination, including the grade given for the examination and comments to the law clerk, and the tutor shall submit a monthly certificate, stating the law clerk's hours engaged in employment, study, and the tutor's personal supervision. If an examination is not given, the monthly certificate shall be submitted stating the reason.

(3) – (4) [Unchanged.]

(f) – (i) [Unchanged.]

[Adopted effective February 12, 1965; Amended effective September 1, 1984; March 6, 1992; September 1, 1994; June 2, 1998; April 1, 2003; January 13, 2009; January 1, 2014; September 1, 2017; September 1, 2022.]

APR 6 LAW CLERK PROGRAM REGULATIONS

Regulation 1 – 1-2 [Unchanged.]

1-3 Definitions.

(A) – (J) [Unchanged.]

K. "Regular, full-time, paid employment" means that the law clerk is hired by the tutor or the tutor's employer in a (i) law office, (ii) legal department, or (iii) a court in Washington State, for an average of 32 hours per week for at least 48 weeks each calendar year. This paid employment requirement cannot be waived or satisfied by unpaid or contract positions.

(L) [Unchanged.]

Regulation 2 [Unchanged.]

Regulation 3. APPLICATION PROCEDURE

3-1 Applicants. Every applicant for enrollment in the program shall:

A. Be engaged in regular, full-time, paid employment as defined in Regulation 1-3 unless requesting an employment waiver or employment location waiver as defined in Reg. 1-3.

(1) – (4) [Unchanged.]

(B) – (C) [Unchanged.]

Regulation 3-2 - 7-5 [Unchanged.]

APR 6
LAW CLERK PROGRAM

(a) Purpose. The Law Clerk Program provides access to legal education guided by a qualified tutor using an apprenticeship model that includes theoretical, experiential, and clinical components. Successful completion of the Law Clerk Program provides a way to meet the education requirement to apply for the lawyer bar examination in Washington; it is not a special admission or limited license to practice law.

(b) Application. Every applicant for enrollment in the law clerk program shall:

(1) Be of good moral character and fitness, as defined in APR 20;

(2) Present satisfactory proof of having been granted a bachelors degree by a college or university with approved accreditation; if the degree was earned in a non-United States jurisdiction, the applicant shall provide supporting documentation as to its equivalency;

(3) Be engaged in regular, full-time, paid employment in Washington State for an average of 32 hours per week with the primary tutor or primary tutor's employer in a (i) law office, (ii) legal department, or (iii) court of general, limited, or appellate jurisdiction in Washington State. This paid employment requirement shall not be waived or satisfied by unpaid or contract positions. The employment must include tasks and duties which contribute to the practical aspects of engaging in the practice of law;

(4) Submit in such form and manner as prescribed by the Bar (i) an application for enrollment in the program, (ii) the tutor's application, and (iii) an application fee;

(5) Appear for an interview, provide any additional information or proof, and cooperate in any investigation, as may be deemed relevant by the Bar; and

(6) If applicable, present a petition for Advanced Standing based on law school courses completed or courses completed in this program during a previous enrollment. The Bar may grant Advanced Standing to an applicant approved for enrollment for courses deemed recently and successfully passed and equivalent to courses in the program.

(7) Where the Bar is satisfied that a primary tutor has arranged a relationship with the applicant's full-time employer consistent with the purposes of the Program, the requirement that the primary tutor, or the primary tutor's employer, be the law clerk's employer may be waived.

(8) Where the Bar is satisfied that the applicant has employment with a tutor whose practice has substantial contacts with Washington state, the requirement that the full-time employment be in Washington state may be waived.

(9) Not be eligible to apply if, at the time of submitting the application, the applicant qualifies for admission as a lawyer under APR 3;

(c) Tutors. To be eligible to act as a tutor in the law clerk program, a lawyer or judicial member as defined in the Washington State Bar Association Bylaws, shall:

(1) Act as a tutor for no more than two law clerks concurrently;

(2) Be an active member in good standing of the Bar, or be a judicial member of the Bar, who has not received a disciplinary sanction in the last 5 years, provided that if there is a discipline pending or a disciplinary sanction has been imposed upon the member more than 5 years preceding the law clerk's application for enrollment, the Bar shall have the discretion to accept or reject the member as tutor;

(3) Have active legal experience in the practice of law as defined by APR 1 or have held the required judicial position for at least 8 of the last 12 years immediately preceding the filing of the law clerks application for enrollment. The 8 years of practice must include at least 2 years in Washington state and may be a combination of active practice and judicial experience but may not include periods of suspension for any reason;

(4) Certify to the applicant's employment as required above and to the tutor's eligibility, and agree to instruct and examine the applicant as prescribed under this rule; and

(5) Act as a tutor only upon the approval of the Bar which may be withheld or withdrawn for any reason.

(d) Enrollment. When an application for enrollment has been approved by the Bar, an enrolled law clerk shall:

(1) Pay an annual fee as set by the Board of Governors.

(2) Meet the minimum monthly requirements of an average of 32 hours per week of regular, full-time, paid employment with the tutor which may include in-office study time and must include an average of 3 hours per week for the tutor's personal supervision of the law clerk. A tutor supervising two clerks in the same month for the same course may combine supervision time to meet the weekly average total of 3 hours. A tutor supervising two clerks in different courses or different months of the same course must supervise the clerks separately for a total average of 6 hours per week (3 hours per clerk). "Personal supervision" is defined as time actually spent with the law clerk for the exposition and discussion of the law, the recitation of cases, and the critical analysis of the law clerk's written assignments.

(3) Complete the prescribed course of study which shall be the equivalent of 4 years of study. Each year of study shall consist of 6 courses completed in 12 months. Months of leave, failed courses, and months in which the enrollee does not meet the minimum number of hours of work and study may not be counted toward the completion of a course and may extend the length of a year of study. Advanced Standing granted may reduce the months of program study. The course of study must be completed within 6 years from the initial date of enrollment.

(4) Abide by APR 6 and the Law Clerk Program Regulations approved by the Board of Governors which provide the course of study, program requirements, and other guidelines to successfully complete the program.

(e) Course of Study. The subjects to be studied, the sequence in which they are to be studied, and any other requirement to successfully complete the program shall be as prescribed in the Law Clerk Program Regulations. Progress toward completion of the program shall be evaluated by submission of examinations, certificates, reports and evaluations as follows:

(1) *Examinations*. At the end of each month, the law clerk shall complete a written examination prepared, administered, and graded by the tutor. The examination shall be answered without research, assistance, or reference to source materials during the examination. The examination shall be graded pass/fail.

(2) *Certificates*. Within 10 days following the month of study, the law clerk or tutor shall submit the examination, including the grade given for the examination and comments to the law clerk, and the tutor shall submit a monthly certificate, stating the law clerk's hours engaged in employment, study, and the tutor's personal supervision. If an examination is not given, the monthly certificate shall be submitted stating the reason.

(3) *Book Reports*. The law clerk shall submit three book reports for the Jurisprudence

course requirement corresponding to each year of study.

(4) *Evaluations*. At intervals deemed necessary, the law clerk shall participate with the tutor in an evaluation of the law clerk's progress.

(f) Completion of the program. A law clerk shall be deemed to have successfully completed the program when:

(1) All required courses have been completed and passed as certified each month by the tutor, and all book reports have been submitted;

(2) The tutor has certified that the law clerk, in the tutor's opinion, is qualified to take the lawyer bar examination and is competent to practice law; and

(3) The Bar has certified that all program requirements are completed.

(g) Termination. The Bar may direct a law clerk to change tutors if approval of a tutor is withdrawn. The Bar may terminate a law clerk's enrollment in the program for:

(1) Failure to complete the prescribed course of study within 6 years from the date of enrollment;

(2) Failure of the tutor to timely submit the monthly examinations and certificates;

(3) Failure to comply with any of the requirements of the law clerk program; and

(4) Any other grounds deemed pertinent.

(h) Effective Date. Revision of this rule shall not apply retroactively. A law clerk may complete the program under the version of the rule in effect at the start of enrollment.

(i) Confidentiality. Unless expressly authorized by the Supreme Court, the program applicant, or a current or former law clerk, enrollment and related records, documents, and proceedings are confidential and shall be privileged against disclosure.

[Adopted effective February 12, 1965; Amended effective September 1, 1984; March 6, 1992; September 1, 1994; June 2, 1998; April 1, 2003; January 13, 2009; January 1, 2014; September 1, 2017; September 1, 2022.]

APR 6 LAW CLERK PROGRAM REGULATIONS

1-1 Authority

Regulation 1. GENERAL

A. The law clerk program established in Rule 6 of the Admission and Practice Rules (APR) and implemented in these regulations is conducted by the Washington State Bar Association at the direction of the Supreme Court. It is administered by the Law Clerk Board under the direction of the Board of Governors.

B. The good moral character and fitness of an applicant is determined pursuant to APR 20 through24.3.

C. To facilitate prompt administration of APR 6 and these regulations, designated staff of the Washington State Bar Association may act on behalf of the Law Clerk Board under APR 6 and these regulations.

D. The Law Clerk Board, with the approval of the Board of Governors, may amend these regulations as necessary. Revisions of these regulations shall not apply retroactively to an enrolled law clerk. These changes shall apply to applications, petitions and requests made after the effective date of the revisions.

1-2 Purpose and Expectations.

A. The law clerk program provides access to legal education guided by a qualified tutor using an apprenticeship model that includes theoretical, scholastic and clinical components. Successful completion of the law clerk program qualifies a person to apply for the Washington State bar exam. Participation in the law clerk program is not a special admission or limited license to practice law.

B. The program relies on the good faith and integrity of the participants. The Board cannot administer and supervise the clerkship on a daily basis. The Board assumes the tutor and the law clerk will adhere to the letter and spirit of the program.

C. The law clerk program is an alternative legal education. The program issues a certificate of completion; it is not approved by the American Bar Association and it does not confer a Juris Doctor degree or other degree.

D. The Board will not assist an applicant for the law clerk program to find employment or to evaluate in advance the qualifications of a potential tutor.

1-3 Definitions.

For the purpose of these regulations, the following terms are defined:

A. "Approved accreditation" means accredited by an accrediting agency recognized by the US Department of Education.

B. "Assistant Tutor" means a qualifying lawyer or judge who has been approved to teach specific courses.

C. "Bar Association" means the Washington State Bar Association.

D. "Board of Governors" means the Board of Governors of the Washington State Bar Association.

E. "Board" means the Law Clerk Board as authorized by APR 2.

F. "Board Liaison" means an individual member of the Law Clerk Board in his or her role as liaison between the law clerk and the Board.
G. "Employment waiver" means a relationship in which the primary tutor is not the law clerk's direct employer but has received Board approval of an alternative relationship under APR6(b)(7) and Regulation 3-1A(2).
H. "Employment Location Waiver" means an employment arrangement in which the law clerk is not employed in Washington state but has received Board approval for an out-of-state employer under APR 6(b)(8) and Regulation 3-1A(3).
I. "Law clerk" means a person whose application for enrollment in the law clerk program has been accepted by the Board. It refers to applicants to the program in that applicants must have employment as a law clerk, legal assistant, or equivalent to qualify for enrollment. Law clerks are not authorized or licensed to engage in the practice of law by virtue of APR 6.
J. "Program" means the law clerk program established by APR 6 and implemented in these regulations.
K. "Regular, full-time, paid employment" means that the law clerk is hired by the tutor or the tutor's employer in a (i) law office, (ii) legal department, or (iii) a court in Washington State, for an average of 32 hours per week for at least 48 weeks each calendar year. This paid employment requirement cannot be waived or satisfied by unpaid or contract positions.
L. "Tutor" means a qualifying lawyer or judicial member who has agreed to teach the law clerk and be responsible for all aspects of compliance with the program.

Regulation 2. LAW CLERK BOARD

2-1 Responsibilities.

The Board will make decisions regarding:

A. Approval or rejection of an application for enrollment in the program.
B. Approval or rejection of a lawyer or a judge to act as a tutor.
C. A petition for advanced standing.
D. A direction to the law clerk to change tutors.
E. A recommendation to the Board of Governors for the termination of a law clerk's enrollment in the program.
F. A petition for readmission.
G. Changes in course contents, course descriptions, or program completion requirements.
H. Applicability of the effect of prior decisions regarding other law clerks and tutors.
I. Recommendations to the Board of Governors regarding amendments to these regulations.
J. Any other matter related to the program or referred to the Board by the Board of Governors.

2-2 Board Liaisons.

A. A law clerk will be assigned to a Board member who shall act as a liaison between the law clerk and the Board.
B. A Board liaison will make decisions regarding:

(1) Recommendations to the Board regarding the acceptance or rejection of an applicant.

(2) An annual evaluation of the law clerk's second and third years.

(3) Recommendations regarding any other matter related to the program or referred to the Board.

2-3 Staff Administration.

A. The Board may delegate duties to staff to facilitate prompt administration of the program.

B. The duties may regularly include but are not limited to:

(1) Review of applications to the program, recommendation regarding their qualifications for the program, and assignment of a Board Liaison;

(2) Approval of assistant tutors to teach specific courses;

(3) Approval of leaves of absence of less than 12 months;

(4) Approval of petitions by law clerks to take courses or electives out of order;

(5) Approval of the 4th year courses; and

(6) Notices of involuntary withdrawal.

2-4 Filing, general.

All applications, petitions or requests shall be submitted to the Board in a form and manner as directed by the Bar Association.

2-5 Review Procedure.

A. Review of Right. An applicant, law clerk or tutor, has a right to have the Board of Governors review the following decisions of the Board:

(1) Rejection of an application for enrollment in the program;

(2) Termination of a law clerk's enrollment in the program; or

(3) Requiring a law clerk to change tutors.

B. Discretionary. An applicant, law clerk or tutor may ask the Board of Governors to review any decision made by the Board.

C. Filing. A petition requesting either review of right or discretionary review shall be:

(1) in writing,

(2) directed to the Board of Governors;

(3) filed with the Bar Association office; and

(4) filed within 30 days of the date the law clerk or applicant received notice of the decision.

Regulation 3. APPLICATION PROCEDURE

3-1 Applicants. Every applicant for enrollment in the program shall:

A. Be engaged in regular, full-time, paid employment as defined in Regulation 1-3 unless requesting an employment waiver or employment location waiver as defined in Reg. 1-3.

(1) Under no circumstances may the tutor assess a fee or require any other form of compensation in return for instructing or employing the law clerk. The law clerk shall receive monetary compensation in compliance with federal and state law governing employment. The Board may require proof of employment as deemed necessary.

(2) Approval of any relationship requiring an employment waiver is within the discretion of the Board. The applicant and proposed tutor must explicitly describe the alternative relationship, show how the purpose of the program will be maintained, and describe how client confidentiality and conflicts of interest will be resolved. Applications or requests for reinstatement that include a petition to waive the requirement that the primary tutor or primary tutor's employer be the law clerk's employer, may be approved under the following conditions:

(a) The Board received applications for the law clerk, primary tutor and the *employing lawyer*. The employing lawyer must establish that the clerk's employment includes tasks and duties that contribute to the practical aspects of engaging in the practice of law required by APR 6(b)(3).

(b) The Employing lawyer must at least meet the requirements of an assistant tutor (whether or not they teach a course). Regulation 4-2A defines the assistant tutor's qualifications as meeting all the qualifications of a tutor except that only five years of active practice is required.

(c) The minimum three hours a week of personal supervision between the law clerk and the tutor required by APR 6(d)(2) must occur in person. Because the pair do not otherwise work together, a minimum amount of personal contact is required.

(d) The law clerk, employing lawyer and primary tutor must have regular contact. It is anticipated that the lawyer's develop a relationship to discuss the progress of the law clerk and guide work and course assignments as required of the tutor in Regulation 4-1D(7).

(e) The employing lawyer must agree to contribute to the monthly certificate. The certificate will include prompts for what the employing lawyer should include in their report.

(f) All three participants must agree to meet with the liaison for their initial interview and at any other meeting the Law Clerk Board Requests. The employing lawyer, as the provider of the practical and experiential component of the program, may not be a passive participant.

(g) A law clerk with an employment waiver may not work or learn in a primarily virtual/remote office situation.

(3) Approval of employment with an out-of-state employer is within the discretion of the Board. The applicant and proposed tutor must explicitly describe the out-of-state location, its proximity to Washington, the type and amount of interaction with the laws and courts of Washington state, and how the purpose of the program will be maintained. Applications or requests for reinstatement that include a petition to waive the requirement that the law clerk be employed in Washington state may be approved under the following conditions:

(a) The primary tutor must be an active member of the Bar Association and intend to remain so throughout the law clerk's course of study.

(b) The primary tutor must certify that the tutor's, or the tutor's workplace, has a case load with at least 51 percent of the cases involving Washington law or being subject to the jurisdiction of the Washington state courts, and that the law clerk will spend some work time on these cases.

(c) The tutor must agree to maintain a caseload that has substantial contact with Washington State. Substantial contact means having a caseload where at lease 51 percent of the cases on average in a given year involve Washington law or are subject to the jurisdiction of Washington State courts. The tutor must annually certify that the caseload meets the substantial contact definition and must notify the Board if the caseload fails to meet the substantial contact definition.

B. Submit the following with the application fee by the deadlines established by the Board:

(1) A completed program application and all required supplemental information;

(2) Official transcripts from all undergraduate and graduate institutions attended, which show the grades received, the date a bachelor's degree was awarded by a school with approved accreditation, and the subject in which it was granted;

(3) Two letters attesting to the applicant's good moral character and appraising the applicant's ability to undertake and successfully complete the program; and

(4) The tutor's application establishing the applicant's and the tutor's eligibility and certifying to compliance with APR 6 and these regulations.

C. Appear for an interview, provide any additional information or proof, or cooperate in any investigation, as may be directed by the Board, the Board of Governors, or pursuant to APR 20-24.3. No decision regarding the good moral character of an applicant made in connection with a program pursuant to APR 6 is binding on the Bar Association or Character and Fitness Board at the time an applicant applies for admission to practice law and membership in the Bar Association, and such issues may be reinvestigated and reconsidered by Bar staff, Bar Counsel, and the Character and Fitness Board. The Bar Association may require any disclosures and conditions of applicant and tutor that appear reasonably necessary for enrollment in the program.

3-2Advanced Standing. A petition to request consideration for advanced standing for law school courses completed or previous enrollment in the law clerk program must be submitted with an application for enrollment.

A. Petition for Advanced Standing. All law clerks must pass the prescribed courses established in these regulations. No courses may be waived. Applicants seeking advanced standing must establish, to the satisfaction of the Board, that the courses for which they seek credit are equivalent to specified prescribed courses in these regulations. The petition shall include:

(1) A list of courses in the law clerk program for which advanced standing is sought. No advanced standing may be sought for Basic Legal Skills;

(2) A list of law clerk program courses completed during a prior enrollment in the program to be used to satisfy the request for advanced standing. Law clerk program courses completed more than five years prior to the application date will not be considered for advanced standing.

(3) A list of the law school courses and course descriptions from the law school course catalogue with an explanation of how each course is equivalent to the law clerk program courses;

(4) Official transcripts for the law school courses. Courses in which the applicant earned a grade less than a B- or 2.7 and/or completed more than five years prior to the Law Clerk Program application date will not be considered. For applicants admitted to the practice of law in a foreign jurisdiction, grades older than five years may be considered in combination with proof of current good standing and active practice of law for three out of the last five years; and

(5) Any additional information the applicant believes will be helpful or which the Board has requested.

B. Determination. In granting advanced standing, the Board will specify:

(1) Any prescribed courses or portions thereof that the law clerk applicant has been deemed to have completed;

(2) Any prescribed courses or portions thereof that the law clerk applicant will be required to pass; and

(3) Any law school courses that the law clerk applicant will be allowed to use to satisfy the fourth-year curriculum.

3-3Additional and Remedial Courses. In its discretion, the Board may also require the law clerk applicant to take and pass certain subjects which appear necessary to prepare the applicant to practice law in this state, regardless of whether or not those courses are prescribed courses or approved elective courses. The Board may require the law clerk applicant to take remedial or other legal or nonlegal instruction.

3-4Notification. The Board will notify an applicant of acceptance or rejection of the application for enrollment. If accepted, the notification will specify the month the law clerk is authorized to begin the program. If rejected, the notification will provide the basis for therejection.

3-5 Acknowledgement of Enrollment.

A. Before beginning the program the law clerk must acknowledge enrollment, pay the annual fee, and agree to disclose in writing to the Bar Association any new conduct or information relevant to the questions in the program application while enrolled in the law clerk program.

B. The Bar Association may require the law clerk to disclose to the tutor any new conduct or information disclosed by the law clerk during enrollment.

C. All programs shall begin the first day of the month specified by the law clerk in the acknowledgement of enrollment; this will be the enrollment date. The enrollment date must not be more than six months after the date of approval by the Board. Any changes to the enrollment date must be amended with a new acknowledgement of enrollment.

Regulation 4. TUTORS

4-1 Tutor's Responsibilities.

A. The tutor is responsible for supervising and guiding the law clerk's education, and for setting an example of the highest ethical and professional conduct. The tutor has an obligation not only to instruct the law clerk, but to ensure only fully competent law clerks are deemed to be qualified to sit for the bar examination.

B. In addition to any other requirements, a potential tutor shall appear for an interview, provide any additional information or proof, or cooperate in any investigation, as may be directed by the Board.

C. The tutor is required to continue to meet the qualifications for a tutor established in APR 6 and remain in good standing throughout the period of the clerkship.

D. In addition to the "personal supervision" required by APR 6, defined as time actually spent with the law clerk for the exposition and discussion of the law, the recitation of cases, and the critical analysis of the law clerk's written assignments, the tutor's responsibilities include:

(1) Guiding and assisting the law clerk's study of each subject, using the course descriptions as a basic outline of course content and emphasizing pertinent state law;

(2) Choosing textbooks, casebooks, and other written, legal materials, selected from those in use at any of the law schools in the state, to guide the law clerk through the subject matter of each course;

(3) Assisting the law clerk in planning the sequence and timing of each prescribed course and of the fourth-year curriculum;
(4) Evaluating the law clerk's progress;
(5) Developing, administering, and grading the monthly examinations;
(6) Submitting the graded monthly examination with written comments and the required certificate to the Board within 10 days of the end of the month in which it was administered;
(7) Assigning the law clerk tasks and duties which are intended to contribute to the law clerk's understanding of the practical aspects of engaging in the practice of law; and
(8) Providing the law clerk with an adequate work station and with reasonable access to an adequate law library.

4-2Assistant Tutors. When an assistant tutor is proposed to teach a course instead of the primary tutor, the Board may approve the application(s) of one or more assistant tutors for up to 6 months of each year of study. The assistant tutor may teach only the course(s) for which the assistant tutor was approved by the Board. Informal assistance to a lesser degree, by other lawyers, judges or staff is generally acceptable without specific approval.

A. Qualification. The assistant tutor shall meet all the qualifications and continuing qualifications established for the tutor in APR 6 and these regulations, except the assistant tutor shall have been actively and continuously engaged in the practice of law or have held the required judicial position for at least five years immediately preceding the commencement of the assistant tutorship.

B. Scope of Delegation.

(1) The assistant tutor may undertake the following duties for the course(s) for which the assistant tutor is approved:

i. Personal supervision as defined by APR 6(d)(2)

ii. Choosing textbooks, casebooks, and resource materials for the course.

iii. Guiding and assisting the law clerk's study of the subject, using the course description as a basic outline of course content and emphasizing pertinent state law.

iv. Developing, administering, and grading the monthly examination.

(2) The primary tutor shall:

i. In consultation with the assistant tutor, determine if the law clerk passed or failed the course;

ii. Remain ultimately responsible for the conduct of the law clerk;

iii. Complete all monthly and other certificates; and

iv. Appear with the law clerk at all oral evaluations with the Board, although the assistant tutor may also be in attendance where appropriate.

Regulation 5. COURSE OF STUDY

5-1 Structure.

A. The program is designed to be a four year course of study in combination with employment. Each year consists of 12 months during which the law clerk is required to study 6 subjects, pass 12 exams and submit 3 book reports.

B. The program is structured so the law clerk studies only one subject at a time and passes it before beginning the next subject. All courses in a given year, including jurisprudence reading, must be completed before the law clerk may study courses in a subsequent year. A law clerk may not take

more course work in any calendar year than is prescribed by these regulations without prior Board approval. The length of time to be devoted to each subject is prescribed by regulation.

C. A law clerk may take leave or vacation in increments of one month upon written notice to the Board. A law clerk may take leave of longer than one month only upon advance written request and approval by the Board. Exceptions for emergency medical situations may be considered. A law clerk may not request leave of more than 12 consecutive months.

5-2 Subjects.

A. Jurisprudence Reading. Every law clerk is required to take the Jurisprudence course, which is a four year reading program, intended to familiarize the law clerk with legal history, philosophy, theory and biography.

B. First Year. To complete the first year of the program, the law clerk shall pass the following prescribed courses. The course entitled "Basic Legal Skills" shall be studied and passed first. Thereafter, the courses may be studied in any order.

Course	Months
Basic Legal Skills	2
Civil Procedure	2
Torts	2
Contracts	2
Agency & Partnerships	2
Property	2

C. Second Year. To complete the second year of the program, the law clerk shall pass the following prescribed courses, in any order:

Course	Months
Community Property	1
Criminal Law	2
Constitutional Law I	2
Corporations	2
Evidence	2
Uniform Commercial Code	3

D. Third Year. To complete the third year of the program, the law clerk shall pass the following prescribed courses, in any order:

Course	Months
Constitutional Law II	2
Professional Responsibility	1
Domestic Relations	2
Wills, Estates, Trusts, Probate	3
Conflict of Laws	2
Criminal Procedure	2

E. Fourth Year. The fourth year of the program is devoted to elective subjects. The law clerk, in consultation with the tutor, shall develop a fourth year curriculum of six electives. The law clerk shall then make a written petition to the Board, at least six months prior to the commencement of the fourth year, for approval of the proposed fourth year course of study.

(1) Under no circumstances will approval or recognition be given to courses directed to fulfillment of a continuing legal or other professional education requirement, or intended to provide a preparation for a bar examination, or taught through correspondence or any equivalent.

(2) Recommended Electives. The following electives are recommended because they will broaden the law clerk's legal background, perspective, and skills. A law clerk may petition the Board for approval of alternative areas of study by including a detailed course description for each proposed course.

Course	Months
Administrative Law	2
Personal Federal Income Tax	2
Land Use	2
Labor Law	2
Remedies	2
Antitrust	2
Creditor-Debtor Relations	2
Securities Regulation	2
Legal Accounting	2
International Law	2
Insurance	2
Consumer Protection	2
Environmental Law	2
Real Property Security	2
American Indian Law	2
Trial Practicum	2
Elder and Disability Law	2

5-3Monthly Examinations. The tutor is responsible for the content and administration of all monthly examinations.

A. Content. Although no specific substantive content is prescribed by the Board, it is anticipated such an examination will test the law clerk's comprehension of the current subject matter, and the law clerk's understanding of the ethical, professional and practical aspects of practicing law.

B. Course Descriptions. The course descriptions in Regulation 7 state the minimum level of knowledge the Board expects a law clerk to obtain in each subject, and provide guidance to the tutor in formulating monthly examinations.

C. Timing. The tutor shall administer an examination covering that month's subjects to the law clerk on or before the last day of each month.

D. Grading. All courses in the program are to be graded as pass/fail only. "Pass" means that the law clerk has exhibited reasonable comprehension of the theory and practice of any given subject to the satisfaction of the tutor and the Board. If a law clerk earns a "Fail" grade the law clerk shall continue to study the subject for an additional month.

E. Certificates. Within 10 days following the month of study, the tutor shall submit the exam, including the grade given for the examination and written comments to the law clerk, and a monthly certificate, stating the law clerk's hours engaged in employment, study and the tutor's personal supervision.

(1) If an exam is not given, the monthly certificate shall be submitted stating the reason.

(2) The date of receipt will be recorded. A pattern of late certificates may be cause for remedial action or termination from the program.

5-4Board Evaluations. At intervals as may be established by the Board, the Board shall conduct an evaluation at which the law clerk and the tutor shall be personally present. The law clerk and the tutor shall be personally present when required by the Board.

A. The Board will not normally test the law clerk's substantive knowledge, but may do so to evaluate whether or not the law clerk is progressing satisfactorily in the program.

B. Materials. In making its evaluation, the Board may consider:

(1) The substantive contents of all monthly examinations;

(2) The tutor's monthly certificates and timeliness of receipt;

(3) Any written course work; and

(4) Any other written or oral materials deemed to be pertinent by the Board.

C. Decision. At the conclusion of the evaluation, the Board may:

(1) Determine the law clerk has successfully mastered the preceding year's course work and is eligible and authorized to begin the next year of the program;

(2) Determine the law clerk has satisfactorily completed the program and is qualified to sit for the bar examination, subject to any other requirements for sitting for the bar examination as set forth in the Admission and Practice Rules;

(3) Advise the tutor regarding the quality, timeliness, or appropriateness of coursework, exams, and certificates;

(4) Direct the law clerk to repeat designated prescribed or elective courses, devote more time to each course, take remedial legal or nonlegal instruction, appear before the Board at more frequent intervals for an examination which may be written or oral;

(5) Require the law clerk to change tutors;

(6) Advise the law clerk that the law clerk's enrollment in the program is terminated.

D. At the conclusion of any evaluation, the Board will provide a brief written summary of its decision to the law clerk and to the tutor.

Regulation 6. WITHDRAWAL AND TERMINATION OF ENROLLMENT

6-1 Withdrawal by Law Clerk.

A. Voluntary. A law clerk who wishes to withdraw from the program shall notify the Board in writing, filed as required by Regulation 2-4.

B. Involuntary. A law clerk will be deemed to have withdrawn from the program if:

(1) The law clerk is absent from the program for more than one month in any calendar year without the Board's prior approval of a petition for a leave of absence. Failure to submit exams and tutor's certificates shall be interpreted as absence from the program;

(2) The law clerk takes a leave of absence from the program for more than 12 consecutive months; or

(3) The annual fee is not paid by the established deadline.

6-2 Withdrawal by Tutor.

A. Voluntary. A tutor who wishes to withdraw from that position shall notify the Board and the law clerk in writing, filed as required by Regulation 2- 4.

B. Involuntary. If a disciplinary sanction is imposed upon a tutor, the tutor will be deemed to have withdrawn from that position. The Board may determine that the imposition of a sanction does not necessitate automatic withdrawal.

C. The Board may direct a law clerk to change tutors if approval of a tutor is withdrawn.

6-3 Termination of Enrollment by the Board.

A. The Board must terminate a law clerk's participation in the program for:

(1) Failure to complete the prescribed course of study within 6 years from the date of enrollment; or

(2) A determination by the Board that the clerk does not meet the character or fitness requirement for continued enrollment in the program

B. The Board may terminate a law clerk's participation in the program for the law clerk's failure to otherwise comply with the requirements of the program or a decision or order of the Board.

Regulation 7. COURSE DESCRIPTIONS

7-1Jurisprudence Reading. A four-year course of reading consisting of three (3) books each year, to be selected from a list approved by the Board. The Board has discretion to select and require specific books which must be read to meet this requirement.

A. Upon completion of each book, the law clerk shall prepare and submit to the Board a short book report. Reports should be submitted every 4 months.

B. A year's coursework shall not be deemed completed unless the book reports are submitted. A law clerk may not begin the next year's course work until the current year's book reports are completed and submitted to the Board.

7-2 First Year Clerkship.

A. Basic Legal Skills. Introduction to basic legal reference materials (including judicial, legislative and administrative primary and secondary sources) and their use; techniques of legal reasoning, analysis and synthesis; legal writing styles. Familiarization with the structure of the federal and state court systems; the concept of case law in a common law jurisdiction; fundamental principles of stare decisis and precedent; the legislative process; principles of statutory construction and interpretation. Law Clerk should be assigned projects of increasing difficulty such as: case abstracts; analysis of a trial record to identify issues; short quizzes to demonstrate ability to locate primary and secondary sources; office memoranda or a trial oriented memorandum of authorities to demonstrate ability to find the law applicable to a factual situation and to differentiate unfavorable authority; an appellate level brief.

B. Civil Procedure. Fundamentals of pleading and procedure in civil litigation, as structured by the Federal Rules of Civil Procedure and the Washington Superior Court Civil Rules. Study shall include: jurisdiction over the person and subject matter; venue; time limits; commencement of actions; pleadings; parties; impleader; interpleader; motions; class actions and intervention; res judicata and collateral estoppel; discovery and other pretrial devices; joinder; summary judgment; judgments; post-trial motions. Law Clerk should be required to draft summons; pleadings; motions; findings of fact and conclusions of law; judgment; interrogatories; requests for admission.

C. Contracts. Study of legal principles related to the formation, operation and termination of the legal relation called contract. General topics include: offer and acceptance; consideration; issues of interpretation; conditions; performance; breach; damages or other remedies; discharge; the parol-evidence rule; the statute of frauds; illegality; assignments; beneficiaries.

D. Property. Study of the ownership, use, and transfer of real property in both historical and modern times. Topics include: estates and interests in land; concurrent ownership; easements; equitable servitudes; conveyances; real estate contracts; nuisance; adverse possession; land use controls; landlord-tenant; the recording system; title insurance.

E. Torts. Study of the historical development, principles, concepts and purposes of the law relating to redress of private injuries. Topics include: conversion; trespass; nuisance; intentional tort; negligence; strict liability; products liability; concepts of duty, causation, and damage; limitations on liability such as proximate cause, contributory negligence, assumption of the risk, immunity; comparative negligence.

F. Agency and Partnership. Legal principles of agency law including definition of the agency relationship, authority and power of agents, notice and knowledge, rights and duties between participants in the relationship, termination of agency relationship, master-servant relationship. Partnership law using the Revised Uniform Partnership Act as a model code. Topics include: formation, partners' rights and duties between themselves, powers, unauthorized acts, notice and knowledge, incoming partner liability, indemnification, contribution, partner's two-fold ownership interest, co-ownership interests and liabilities, creditor's claims and remedies, dissolution events, winding up, distribution of asset rules. Study of the Uniform Limited Partnership Act and joint venture law.

7-3 Second Year Clerkship.

A. Community Property. Relationship necessary for creation of community property, classification of property as community or separate, management and control of community assets, rights of creditors, disposition of community property upon dissolution of the community, problems of conflict of laws encountered in transactions with common-law jurisdictions.

B. Criminal Law. Study of substantive criminal law including concepts such as elements of criminal responsibility; principles of justification and excuse; parties; attempts, conspiracy; specific crimes; statutory interpretation; some introduction to sentencing philosophies and to juvenile offender law.

C. Constitutional Law I. Course covers basic constitutional document, excluding the Bill of Rights. Topics include: taxing clause, commerce clause, contract clause, war power and treaty power. Allocation and distribution of power within the federal system, and between federal and state systems, including economic regulatory power and police power; limitations on powers of state and national governments; constitutional role of the courts.

D. Corporations. Business corporations for profit using the Model Business Corporations Act and state law provisions. Topics include: promotion, formation and organization; theories of corporations; corporate purposes and powers; disregard of corporateness; common law and statutory duties and liabilities of shareholders, directors, and officers; allocation of control, profit and risk; rights of shareholders; derivative suits and class action suits by shareholders; mergers and consolidations, sale of assets, and other fundamental changes in corporate structure; corporate dissolution; SEC proxy rules and Rule 10(b)(5).

E. Evidence. Rules of proof applicable to judicial trials. Topics include: admission and exclusion of evidence, relevancy, hearsay rule and its exceptions, authentication of writings, the best evidence rule, examination and competency of witnesses, privileges, opinion and expert testimony, demonstrative evidence, presumptions, burden of proof, judicial notice.

F. Uniform Commercial Code. Course covers Articles I, II, III, IV, VI, VII, and X of the Uniform Commercial Code. Course first examines problems in the sale of goods as governed by Article II (with a brief survey of its antecedents) including: warranty, risk of loss, acceptance and rejection, tender of delivery, revocation, remedies for breach of contract. Some discussion of other laws relating to warranties, Article VI on Bulk Sales, and Article VII on documents of title and bills of lading. Course next examines commercial paper, bank deposits and collections under UCC Articles III and IV, including: formation and use of negotiable instruments with an emphasis on checks, rights and liability of parties to negotiable instruments, defenses to liability, study of bank collection process and bank's relationship with its customers. Course finally examines secured transactions under UCC Article IX, including: types of security interests, perfection of such interests, priority of claims, rights to proceeds of collateral, multi-state transactions, rights of parties after debtor's default.

7-4 Third Year Clerkship.

A. Constitutional Law II. Course examines the Bill of Rights. Topics include: free speech, prior restraint, obscenity, libel, fair trial and free press, loyalty oaths, compulsory disclosure laws, sedition and national security, picketing, symbolic conduct, protest, subversive advocacy; due process; equal protection development and analysis; fundamental rights and entitlements; religious clause; jury trial

right in civil actions; constitutional protection and interpretation under state as contrasted to federal constitutional documents.

B. Professional Responsibility. Study of legal ethics and a lawyer's roles in society, including lawyer-client relations, lawyer-public relations, and a lawyer's responsibility to the courts and the profession. Topics also include: organization of an integrated bar, Supreme Court's supervisory powers, professional service corporations, pre- paid legal services arrangements, malpractice, the Admission to Practice Rules, the Rules for the Enforcement of Lawyer Conduct, the Rules of Professional Conduct and the ABA Model Rules of Professional Conduct.

C. Domestic Relations. Study of the substantive and procedural law affecting the formation, disintegration and dissolution of family relations, including those of husband and wife, parent and child, and non-marital. Topics include: jurisdiction, procedure, costs, maintenance, child support, property division, custody, modification and enforcement of orders, some discussion of conflict of laws, taxation, URESA and UPA.

D. Wills, Estates, Trusts, Probate. Study of the voluntary transmission of assets in contemplation of and at death. Topics include: disposition by will, creation of and disposition by a trust, effectiveness of the disposition in the creation of present and future interests in property, intestate succession, construction problems, powers of appointment, restrictions on perpetuities and accumulations, alternative methods of wealth transmission, some introduction to the basic tax framework important in formulating plans of disposition, and fiduciary administration and management of decedent's estates and trusts.

E. Conflict of Laws. Study of that part of the law that determines by which state's law a legal problem will be solved. Topics include: choice-of-law problems in torts, contracts, property, domestic relations, administration of estates, and business associations.

F. Criminal Procedure. Constitutional doctrines governing criminal procedure. Topics include: Fourth, Fifth, Sixth and Eighth Amendments, pertinent due process provisions of Fourteenth Amendment; search and seizure, confessions, identification procedures, right to counsel, arrest, jury trial, double jeopardy, and pertinent provisions of the state constitution. The Superior Court Criminal Rules are examined as they relate to the procedural aspects of raising the constitutional issues.

7-5 Fourth Year Clerkship;Electives.

A. Administrative Law. Study of the administrative process and its role in the legal system. Subjects include: powers and procedures of administrative agencies, relationship of administrative agencies to executive, judicial and legislative departments of government.

B. Personal Federal Income Tax. Examination of federal income tax law as it applies to individuals, but not in their role as partners, shareholders, or beneficiaries of trusts or estates. Topics include: concepts of income, gross income, net income, when income should be taxed, to whom it should be taxed and its character as unearned, earned or capital gain income. Deductions are also examined in detail.

C. Land Use. Study of legal principles and constitutional limitations affecting systems for public regulation of the use of private land. Topics include: planning, zoning, variances, special use permits, subdivision controls, environmental legislation, nuisance, eminent domain, powers of public agencies, "taking" without just compensation, due process, administrative procedures and judicial review, exclusionary zoning and growth control.

D. Labor Law. Study of the organizational rights of employees and unions and the governance of the use of economic force by employers and unions. Other topics include the duty to bargain collectively, the manner in which collective bargaining is conducted, subjects to which it extends, administration and enforcement of collective bargaining agreements, and relations between a union and its members.

E. Remedies. Historical development and use of judicial remedies that provide relief for past or potential injuries to interests in real or personal property. Topics include: history of equity, power of equity courts, restitution, specific performance, injunctions, equitable defenses, compensatory and punitive damages, unjust enrichment, constructive trusts, equitable liens, tracing and subrogation.

F. Antitrust. An examination of the antitrust laws including the Sherman Act, Clayton Act, Robinson-Patman Act, Federal Trade Commission Act; and topics such as monopolies, restraint of trade, mergers, price fixing, boycotts, market allocation, tieing arrangements, exclusive dealing and state antitrust law.

G. Creditor-Debtor Relations. Rights and remedies of creditors and debtors under the Federal Bankruptcy Code, particularly in straight bankruptcy cases and under state laws relating to judgments, judgment liens, executions, attachments, garnishments, fraudulent conveyances, compositions, assignments for the benefit of creditors, and debtor's exemptions.

H. Securities Regulation. Study of legal control over the issuance and distribution of corporate securities. Topics include: registration and distribution of securities under the Federal Securities Act of 1933, including the definition of a security; basic structure, applicability, and prohibitions of the Act; underwriting; preparation, processing and use of registration statement and prospectuses; exemptions from registration under the Act, including Regulation A, private offerings, and business reorganizations and recapitalizations; secondary distributions; brokers transactions; and civil liability for violation of the Act. Registration, distribution and regulation of securities under state "blue sky" laws, including the State of Washington Securities Act. Regulation of franchise arrangements under the Federal Securities Act of 1933 and the State of Washington Franchise Investment Protection Act. Regulation of national securities exchanges and broker- dealers; registration and listing of securities on national securities exchanges; periodic reporting and public disclosure of information requirements for companies whose securities are traded on national securities exchanges; and civil liability for violation of the Act. Regulation of mutual funds and other types of investment companies under the Federal Investment Company Act of 1940.

I. Legal Accounting. Bookkeeping, use of journals and ledgers, analysis of financial statements, professional responsibility of a lawyer to a corporate client and relationship to accountants involved in a client's financial affairs. Course also addresses lawyer's accounting and recordkeeping obligations to his or her client under the Rules of Professional Conduct or its successor.

J. International Law. Legal process by which interests are adjusted and authoritative decisions made on the international level. Topics include: nature and source of international law, law of treaties, jurisdiction, some discussion of international legal organizations, state responsibility and international claims for wrongs to citizens abroad, and application of international law in United States courts.

K. Insurance. Legal principles governing formal mechanisms for the distribution of risk of loss. Emphasis is on property, casualty, life insurance. Topics include: marketing of insurance, indemnity principle, insurable interest, amount of recovery and subrogation, persons and interests protected, brokers, and identification of risks transferred by insurance.

L. Consumer Protection. Selected laws for protection of consumers, including federal, state and local laws that prohibit deceptive advertising, mandate disclosure of information, regulate credit practices, license occupations, establish quality standards for products and services, and condemn "unfair" practices. Emphasis on the theoretical justifications for governmental intervention in the marketplace. Attention to problems of consumer justice administration, including informal dispute resolution procedures and representation of consumer interests in administrative and legislative proceedings.

M. Environmental Law. Survey of citizen, legislative, administrative and judicial action in response to the reality and the threat of man-induced alteration to the natural environment; focuses on National Environmental Policy Act, federal air and water pollution control legislation, state air and water pollution control statutes and shoreline management.

N. Real Property Security. Methods by which an obligation may be secured by real property of the obligor or of a third person. Covers the common- law principles and statutes that regulate the creation, operation, and extinguishment of the legal relations known as the real property mortgage and deed of trust, considered in the context of financing the purchase or development of land. Some attention must be given to principles governing operation of the lendingindustry.

O. American Indian Law. Tribal/state/federal judicial and legislative jurisdiction in Indian country. Criminal and civil jurisdiction. Indian religious freedom. Indian water rights. Special hunting and fishing rights. History of federal laws and policies towards Indians. Current federal law and policy. Judicial trends in Indian cases. The federal trust responsibility toward Indian tribes; tribal powers of self government. Tribal courts. Federal supremacy (preemption) over state law in Indian country.

P. Trial Practicum. Advanced course in preparing for trial. Resources should include sample cases and text books as well as evidence and civil rules. The clerk will write a fully researched brief, motions in limine, prepare ER 904; prepare objections to opposition motions in limine and ER 904; argue pretrial motions; research and perform voir dire; prepare and give an opening statement; prepare and give a direct exam with introduction of multiple exhibits; prepare and give a cross exam with introduction of exhibits; draft and argue jury instructions; prepare and give a closing statement.

   Then to be assigned an actual case in litigation and add to the above, a mock trial which includes: prepared statement of the "story" of the case; illustrate how each witness fits into the story and what evidence is to be used with each witness; develop direct examination of one witness, cross examination of one witness and at least one exhibit for each witness; prepare and give an opening; conduct voir dire of volunteers; examine a witness; handle objections; and argue sample motions in limine. The clerk is expected to attend court proceedings regularly, and participate to the extent permitted by APR 9, if licensed.

Q. Elder and Disability Law. An examination and study of the complex legal needs of people who are elderly and people who have a disability. This course examines major issues and substantive laws affecting people who are elderly or who have a disability including income protection, asset preservation and protection, options for financing long-term care and healthcare, planning for

incapacity and the use of traditional and nontraditional estate and life care planning devices such as wills, trusts, special needs trusts, powers of attorney, guardianships, adult protection actions and other devices but in the context of the needs of people who are elderly or who have a disability. This course will also address the special ethical challenges and concerns of lawyers who are practicing elder and disability law.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Benjamin Phillabaum, Chair, Law Clerk Board
Christell Casey, Incoming Chair, Law Clerk Board
Cathy Biestek, Managing Regulatory Counsel
Katherine Skinner, Law Clerk Program Lead

DATE: August 26, 2025

RE: Proposed Amendments to Law Clerk Program Regulations to Be Effective Upon Approval by Board of Governors

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Action: The Law Clerk Board is submitting proposed amendments to the Law Clerk Program Regulations to be effective upon approval by the Board of Governors.

The Board of Governors has the authority to make amendments to the APR 6 Law Clerk Program Regulations that are consistent with Rule 6 of the Admission and Practice Rules (APR). *See* APR 6(d)(4); APR 2(4)(A) & (7). The Law Clerk Program (Program) is a four-year program designed to provide educational and practical experience through a combination of work and study with an experienced lawyer or judge. Completion of the Program qualifies the law clerk to take the Washington lawyer bar examination pursuant to the requirements under APR 3(b).

A designated rules committee of the Law Clerk Board (Board) developed several proposed amendments to the Program Regulations after extensive review and discussion. The proposed amendments are intended to clarify program requirements, provide for increased accessibility to the Program, and make the Program more efficient to administer by the Board and WSBA staff. On August 1, 2025, the Board voted to approve and submit these proposed amendments to the Board of Governors for approval. Because these proposed amendments are consistent with APR 6, the Board requests the changes become effective upon approval by the Board of Governors.[1]

Proposed amendments to the Law Clerk Program Regulations

The proposed amendments to the Program Regulations are described below.

Remote and hybrid office arrangements

Law clerks may participate in the Program from anywhere in Washington State. The increase in quality and use of various technologies has opened the door for many law clerks to be able to work and learn in remote and hybrid

[1] On August 1, 2025, the Board voted to approve several changes to APR 6 and the Program Regulations. Some of the proposed changes to the Program Regulations relate to proposed changes to APR 6 and some do not. Therefore, these changes are being submitted to the Board of Governors via two separate requests for action and memoranda to the Board of Governors: (1) this memo requesting approval of proposed amendments to Program Regulations that are consistent with APR 6 and, therefore, will be effective upon approval by the Board of Governors and (2) a separate memo requesting approval of suggested changes to APR 6 and related Program Regulations that would become effect on the effective date of any changes to APR 6 adopted by the Court.

office environments. The Board is proposing to update the regulations to allow for Board approval of remote or hybrid office arrangements for law clerks in the Program, including law clerks with an employment waiver (*i.e.*, the tutor is not the employer of the law clerk). The applicant and proposed tutor must explicitly describe the proposed office arrangements in the application for the Board's review, including how the law clerk will maintain regular, significant, and meaningful contact with the office (or court or department).

Textbooks

Currently tutors and law clerks are restricted to choosing textbooks, casebooks, and other written, legal materials from those in use at law schools in the state of Washington only. The proposed amendment to Regulation 4-1.D(2) allows tutors and law clerks to choose course materials in use at any law school approved by the Board of Governors as defined in the WSBA Admissions Policies (defining approved law school to mean "[o]nly those law schools approved, or provisionally approved, by the American Bar Association … are approved by the Board of Governors.") WSBA Admissions Policies I.B. Again, the increase in quality and use of technology makes it possible to find course materials in use at law schools not located in the state. The Board believes that increasing the number of law schools from which tutors and law clerks can choose their course materials will help tutors and law clerks to find a variety of quality course materials more easily.

Additional changes proposed

Additional proposed amendments are intended to address issues that need greater clarity for Program participants and the Board. These include:

- Replacing "letters" with updated term "good moral character certificates" that attest to applicant's good moral character and ability to undertake and successfully complete the Program. This is the same term used for applications for admission.
- Clarifying Program responsibilities of tutors and law clerks, including that tutors are responsible for providing written comments on graded monthly exams and for providing a monthly certificate to the Board but either the law clerk or the tutor can submit the monthly exam.
- Deleting "involuntary" withdrawal and moving what is currently bases for involuntary withdrawal to the section identifying reasons for which the Board may terminate a law clerk's participation in the Program.

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

The risk analysis is included in the BOG's 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 amendments includes allocation of existing indirect expenses for staff time used to draft and incorporate the changes to WSBA records and outreach to communicate changes to stakeholders. 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.*

This equity analysis was conducted using the materials from both proposed actions related to the APR 6 program submitted by the Law Clerk Board for this meeting.

The proposed changes allowing for remote or hybrid office arrangements, ability to use textbooks assigned by any ABA-accredited law school reduce unnecessary barriers to entering and completing the program, which has a potential for an indirect, net positive effect on advancing diversity and inclusion in the legal profession.

The impact of the proposed changes that clarify certain program requirements, including termination from the program, are difficult to assess with the available materials. However, the changes appear to add greater specificity as to what warrants removal from the program, which may help mitigate bias in decision-making.

If approved by the Board of Governors, the WSBA staff responsible for implementing these changes should strongly consider developing a plan to collect data that helps them evaluate the true impact of these changes on attracting and retaining law clerk participants from communities that are underrepresented and marginalized in the profession.

Attachments

1. Proposed amendments to the Law Clerk Program Regulations – Mark-Up Copy
2. Proposed amendments to Law Clerk Program Regulations – Clean Copy

APR 6 LAW CLERK PROGRAM REGULATIONS

Regulation 1 [Unchanged.]

Regulation 2 [Unchanged.]

Regulation 3. APPLICATION PROCEDURE

3-1 Applicants. Every applicant for enrollment in the program shall:

A. Be engaged in regular, full-time employment as defined in Regulation 1-3 unless requesting an employment waiver or employment location waiver as defined in Reg. 1-3.

(1) [Unchanged.]

(2) Approval of any relationship requiring an employment waiver is within the discretion of the Board. The applicant and proposed tutor must explicitly describe the alternative relationship, show how the purpose of the program will be maintained, and describe how client confidentiality and conflicts of interest will be resolved. Applications or requests for reinstatement that include a petition to waive the requirement that the primary tutor or primary tutor's employer be the law clerk's employer, may be approved under the following conditions:

(a) – (b) [Unchanged.]

(c) The minimum three hours a week of personal supervision between the law clerk and the tutor required by APR 6(d)(2) ~~must~~may occur in person or remotely. Because the pair do not otherwise work together, a minimum amount of personal contact is required.

(d) [Unchanged.]

(e) The employing lawyer must agree to contribute to ~~the~~a monthly certificate. The certificate will include prompts for what the employing lawyer should include in their report.

(f) [Unchanged.]

~~(g) A law clerk with an employment waiver may not work or learn in a primarily virtual/remote office situation.~~

(3) [Unchanged.]

(4) Approval of remote office and hybrid office arrangements combining in-person and remote work are within the discretion of the Board. The applicant and proposed tutor must explicitly describe the proposed office arrangement in the application for the Board's review, including how the law clerk will maintain regular, significant, and meaningful contact with the office (or court or department).

B. Submit the following with the application fee by the deadlines established by the Board:

(1) – (2)

(3) Two ~~letters~~good moral character certificates attesting to the applicant's good moral character and appraising the applicant's ability to undertake and successfully complete the program; and

(4) [Unchanged.]

C. [Unchanged.]

Regulation 3-2 - 3-5 [Unchanged.]

Regulation 4. TUTORS

4-1 Tutor's Responsibilities.

(A) – (C) [Unchanged.]

D. In addition to the "personal supervision" required by APR 6, defined as time actually spent with the law clerk for the exposition and discussion of the law, the recitation of cases, and the critical analysis of the law clerk's written assignments, the tutor's responsibilities include:

(1) [Unchanged.]

(2) Choosing textbooks, casebooks, and other written, legal materials, selected from those in use at any ~~of the~~ law school~~s~~ approved by the Board of Governors as defined in the WSBA Admissions Policies ~~in the state~~, to guide the law clerk through the subject matter of each course;

(3) – (5) [Unchanged.]

(6) Providing written comments on a graded monthly exam to the law clerk and ~~S~~submitting ~~the graded monthly examination with written comments and~~ the required certificate to the Board within 10 days of the end of the month in which ~~it~~the exam was administered;

(7) – (8) [Unchanged.]

4-2 [Unchanged.]

Regulation 5. COURSE OF STUDY

5-1 – 5-2 [Unchanged.]

5-3 Monthly Examinations. The tutor is responsible for the content and administration of all monthly examinations.

(A) – (D) [Unchanged.]

E. Certificates. Within 10 days following the month of study, the law clerk or tutor shall submit the exam, including the grade given for the examination and written comments to the law clerk, and the tutor shall submit a monthly certificate, stating the law clerk's hours engaged in employment, study and the tutor's personal supervision.

(1) – (2) [Unchanged.]

5-4 [Unchanged.]

Regulation 6. WITHDRAWAL AND TERMINATION OF ENROLLMENT

6-1 Withdrawal by Law Clerk.

A. [Unchanged.]

~~B. Involuntary. A law clerk will be deemed to have withdrawn from the program if:~~

~~(1) The law clerk is absent from the program for more than one month in any calendar year without the Board's prior approval of a petition for a leave of absence. Failure to submit exams and tutor's certificates shall be interpreted as absence from the program;~~

~~(2) The law clerk takes a leave of absence from the program for more than 12 consecutive months; or~~

~~(3) The annual fee is not paid by the established deadline.~~

Regulation 6-2[Unchanged.]

6-3 Termination of Enrollment by the Board.

A. [Unchanged]

B. The Board may terminate a law clerk's participation in the program ~~for~~when the law clerk~~'s failure to otherwise comply with the requirements of the program or a decision or order of the Board.~~

(1) Is absent from the program for more than one month in any calendar year without the Board's

prior approval of a petition for a leave of absence. Failure to submit exams and tutor's certificates shall be interpreted as absence from the program;

(2) Takes a leave from the program for more than 12 consecutive months;

(3) Fails to pay the annual fee by the established deadline; or

(4) Fails to otherwise comply with the requirements of the program or a decision or order of the Board.

Regulation 7 [Unchanged.]

APR 6 LAW CLERK PROGRAM REGULATIONS

1-1 Authority

Regulation 1. GENERAL

A. The law clerk program established in Rule 6 of the Admission and Practice Rules (APR) and implemented in these regulations is conducted by the Washington State Bar Association at the direction of the Supreme Court. It is administered by the Law Clerk Board under the direction of the Board of Governors.

B. The good moral character and fitness of an applicant is determined pursuant to APR 20 through24.3.

C. To facilitate prompt administration of APR 6 and these regulations, designated staff of the Washington State Bar Association may act on behalf of the Law Clerk Board under APR 6 and these regulations.

D. The Law Clerk Board, with the approval of the Board of Governors, may amend these regulations as necessary. Revisions of these regulations shall not apply retroactively to an enrolled law clerk. These changes shall apply to applications, petitions and requests made after the effective date of the revisions.

1-2 Purpose and Expectations.

A. The law clerk program provides access to legal education guided by a qualified tutor using an apprenticeship model that includes theoretical, scholastic and clinical components. Successful completion of the law clerk program qualifies a person to apply for the Washington State bar exam. Participation in the law clerk program is not a special admission or limited license to practice law.

B. The program relies on the good faith and integrity of the participants. The Board cannot administer and supervise the clerkship on a daily basis. The Board assumes the tutor and the law clerk will adhere to the letter and spirit of the program.

C. The law clerk program is an alternative legal education. The program issues a certificate of completion; it is not approved by the American Bar Association and it does not confer a Juris Doctor degree or other degree.

D. The Board will not assist an applicant for the law clerk program to find employment or to evaluate in advance the qualifications of a potential tutor.

1-3 Definitions.

For the purpose of these regulations, the following terms are defined:

A. "Approved accreditation" means accredited by an accrediting agency recognized by the US Department of Education.

B. "Assistant Tutor" means a qualifying lawyer or judge who has been approved to teach specific courses.

C. "Bar Association" means the Washington State Bar Association.

D. "Board of Governors" means the Board of Governors of the Washington State Bar Association.

E. "Board" means the Law Clerk Board as authorized by APR 2.

F. "Board Liaison" means an individual member of the Law Clerk Board in his or her role as liaison between the law clerk and the Board.

G. "Employment waiver" means a relationship in which the primary tutor is not the law clerk's direct employer but has received Board approval of an alternative relationship under APR6(b)(7) and Regulation 3-1A(2).

H. "Employment Location Waiver" means an employment arrangement in which the law clerk is not employed in Washington state but has received Board approval for an out-of-state employer under APR 6(b)(8) and Regulation 3-1A(3).

I. "Law clerk" means a person whose application for enrollment in the law clerk program has been accepted by the Board. It refers to applicants to the program in that applicants must have employment as a law clerk, legal assistant, or equivalent to qualify for enrollment. Law clerks are not authorized or licensed to engage in the practice of law by virtue of APR 6.

J. "Program" means the law clerk program established by APR 6 and implemented in these regulations.

K. "Regular, full-time employment" means that the law clerk is hired by the tutor or the tutor's employer in a (i) law office, (ii) legal department, or (iii) a court in Washington State, for an average of 32 hours per week for at least 48 weeks each calendar year.

L. "Tutor" means a qualifying lawyer or judicial member who has agreed to teach the law clerk and be responsible for all aspects of compliance with the program.

Regulation 2. LAW CLERK BOARD

2-1 Responsibilities.

The Board will make decisions regarding:

A. Approval or rejection of an application for enrollment in the program.

B. Approval or rejection of a lawyer or a judge to act as a tutor.

C. A petition for advanced standing.

D. A direction to the law clerk to change tutors.

E. A recommendation to the Board of Governors for the termination of a law clerk's enrollment in the program.

F. A petition for readmission.

G. Changes in course contents, course descriptions, or program completion requirements.

H. Applicability of the effect of prior decisions regarding other law clerks and tutors.

I. Recommendations to the Board of Governors regarding amendments to these regulations.

J. Any other matter related to the program or referred to the Board by the Board of Governors.

2-2 Board Liaisons.

A. A law clerk will be assigned to a Board member who shall act as a liaison between the law clerk and the Board.

B. A Board liaison will make decisions regarding:

(1) Recommendations to the Board regarding the acceptance or rejection of an applicant.

(2) An annual evaluation of the law clerk's second and third years.

(3) Recommendations regarding any other matter related to the program or referred to the Board.

2-3 Staff Administration.

A. The Board may delegate duties to staff to facilitate prompt administration of the program.

B. The duties may regularly include but are not limited to:

(1) Review of applications to the program, recommendation regarding their qualifications for the program, and assignment of a Board Liaison;

(2) Approval of assistant tutors to teach specific courses;

(3) Approval of leaves of absence of less than 12 months;

(4) Approval of petitions by law clerks to take courses or electives out of order;

(5) Approval of the 4th year courses; and

(6) Notices of involuntary withdrawal.

2-4 Filing, general.

All applications, petitions or requests shall be submitted to the Board in a form and manner as directed by the Bar Association.

2-5 Review Procedure.

A. Review of Right. An applicant, law clerk or tutor, has a right to have the Board of Governors review the following decisions of the Board:

(1) Rejection of an application for enrollment in the program;

(2) Termination of a law clerk's enrollment in the program; or

(3) Requiring a law clerk to change tutors.

B. Discretionary. An applicant, law clerk or tutor may ask the Board of Governors to review any decision made by the Board.

C. Filing. A petition requesting either review of right or discretionary review shall be:

(1) in writing,

(2) directed to the Board of Governors;

(3) filed with the Bar Association office; and

(4) filed within 30 days of the date the law clerk or applicant received notice of the decision.

Regulation 3. APPLICATION PROCEDURE

3-1 Applicants. Every applicant for enrollment in the program shall:

A. Be engaged in regular, full-time employment as defined in Regulation 1-3 unless requesting an employment waiver or employment location waiver as defined in Reg. 1-3.

(1) Under no circumstances may the tutor assess a fee or require any other form of compensation in return for instructing or employing the law clerk. The law clerk shall receive monetary compensation in compliance with federal and state law governing employment. The Board may require proof of employment as deemed necessary.

(2) Approval of any relationship requiring an employment waiver is within the discretion of the Board. The applicant and proposed tutor must explicitly describe the alternative relationship, show how the purpose of the program will be maintained, and describe how client confidentiality and conflicts of interest will be resolved. Applications or requests for reinstatement that include a petition to waive the requirement that the primary tutor or primary tutor's employer be the law clerk's employer, may be approved under the following conditions:

(a) The Board received applications for the law clerk, primary tutor and the *employing lawyer*. The employing lawyer must establish that the clerk's employment includes tasks and duties that contribute to the practical aspects of engaging in the practice of law required by APR 6(b)(3).

(b) The Employing lawyer must at least meet the requirements of an assistant tutor (whether or not they teach a course). Regulation 4-2A defines the assistant tutor's qualifications as meeting all the qualifications of a tutor except that only five years of active practice is required.

(c) The minimum three hours a week of personal supervision between the law clerk and the tutor required by APR 6(d)(2) may occur in person or remotely. Because the pair do not otherwise work together, a minimum amount of personal contact is required.

(d) The law clerk, employing lawyer and primary tutor must have regular contact. It is anticipated that the lawyer's develop a relationship to discuss the progress of the law clerk and guide work and course assignments as required of the tutor in Regulation 4-1D(7).

(e) The employing lawyer must agree to contribute to a monthly certificate. The certificate will include prompts for what the employing lawyer should include in their report.

(f) All three participants must agree to meet with the liaison for their initial interview and at any other meeting the Law Clerk Board Requests. The employing lawyer, as the provider of the practical and experiential component of the program, may not be a passive participant.

(3) Approval of employment with an out-of-state employer is within the discretion of the Board. The applicant and proposed tutor must explicitly describe the out-of-state location, its proximity to Washington, the type and amount of interaction with the laws and courts of Washington state, and how the purpose of the program will be maintained. Applications or requests for reinstatement that include a petition to waive the requirement that the law clerk be employed in Washington state may be approved under the following conditions:

(a) The primary tutor must be an active member of the Bar Association and intend to remain so throughout the law clerk's course of study.

(b) The primary tutor must certify that the tutor's, or the tutor's workplace, has a case load with at least 51 percent of the cases involving Washington law or being subject to the jurisdiction of the Washington state courts, and that the law clerk will spend some work time on these cases.

(c) The tutor must agree to maintain a caseload that has substantial contact with Washington State. Substantial contact means having a caseload where at lease 51 percent of the cases on average in a given year involve Washington law or are subject to the jurisdiction of Washington State courts. The tutor must annually certify that the caseload meets the substantial contact definition and must notify the Board if the caseload fails to meet the substantial contact definition.

(4) Approval of remote office and hybrid office arrangements combining in-person and remote work are within the discretion of the Board. The applicant and proposed tutor must explicitly describe the proposed office arrangement in the application for the Board's review, including how the law clerk will maintain regular, significant, and meaningful contact with the office (or court or department).

B. Submit the following with the application fee by the deadlines established by the Board:

(1) A completed program application and all required supplemental information;

(2) Official transcripts from all undergraduate and graduate institutions attended, which show the grades received, the date a bachelor's degree was awarded by a school with approved accreditation, and the subject in which it was granted;

(3) Two good moral character certificates attesting to the applicant's good moral character and appraising the applicant's ability to undertake and successfully complete the program; and

(4) The tutor's application establishing the applicant's and the tutor's eligibility and certifying to compliance with APR 6 and these regulations.

C. Appear for an interview, provide any additional information or proof, or cooperate in any investigation, as may be directed by the Board, the Board of Governors, or pursuant to APR 20-24.3. No decision regarding the good moral character of an applicant made in connection with a program pursuant to APR 6 is binding on the Bar Association or Character and Fitness Board at the time an applicant applies for admission to practice law and membership in the Bar Association, and such issues may be reinvestigated and reconsidered by Bar staff, Bar Counsel, and the Character and Fitness Board. The Bar Association may require any disclosures and conditions of applicant and tutor that appear reasonably necessary for enrollment in the program.

3-2Advanced Standing. A petition to request consideration for advanced standing for law school courses completed or previous enrollment in the law clerk program must be submitted with an application for enrollment.

A. Petition for Advanced Standing. All law clerks must pass the prescribed courses established in these regulations. No courses may be waived. Applicants seeking advanced standing must establish, to the satisfaction of the Board, that the courses for which they seek credit are equivalent to specified prescribed courses in these regulations. The petition shall include:

(1) A list of courses in the law clerk program for which advanced standing is sought. No advanced standing may be sought for Basic Legal Skills;

(2) A list of law clerk program courses completed during a prior enrollment in the program to be used to satisfy the request for advanced standing. Law clerk program courses completed more than five years prior to the application date will not be considered for advanced standing.

(3) A list of the law school courses and course descriptions from the law school course catalogue with an explanation of how each course is equivalent to the law clerk program courses;

(4) Official transcripts for the law school courses. Courses in which the applicant earned a grade less than a B- or 2.7 and/or completed more than five years prior to the Law Clerk Program application date will not be considered. For applicants admitted to the practice of law in a foreign jurisdiction, grades older than five years may be considered in combination with proof of current good standing and active practice of law for three out of the last five years; and

(5) Any additional information the applicant believes will be helpful or which the Board has requested.

B. Determination. In granting advanced standing, the Board will specify:

(1) Any prescribed courses or portions thereof that the law clerk applicant has been deemed to have completed;

(2) Any prescribed courses or portions thereof that the law clerk applicant will be required to pass; and

(3) Any law school courses that the law clerk applicant will be allowed to use to satisfy the fourth-year curriculum.

3-3Additional and Remedial Courses. In its discretion, the Board may also require the law clerk applicant to take and pass certain subjects which appear necessary to prepare the applicant to practice law in this state, regardless of whether or not those courses are prescribed courses or approved elective courses. The Board may require the law clerk applicant to take remedial or other legal or nonlegal instruction.

3-4Notification. The Board will notify an applicant of acceptance or rejection of the application for enrollment. If accepted, the notification will specify the month the law clerk is authorized to begin the program. If rejected, the notification will provide the basis for therejection.

3-5 Acknowledgement of Enrollment.

A. Before beginning the program the law clerk must acknowledge enrollment, pay the annual fee, and agree to disclose in writing to the Bar Association any new conduct or information relevant to the questions in the program application while enrolled in the law clerk program.

B. The Bar Association may require the law clerk to disclose to the tutor any new conduct or information disclosed by the law clerk during enrollment.

C. All programs shall begin the first day of the month specified by the law clerk in the acknowledgement of enrollment; this will be the enrollment date. The enrollment date must not be more than six months after the date of approval by the Board. Any changes to the enrollment date must be amended with a new acknowledgement of enrollment.

Regulation 4. TUTORS

4-1 Tutor's Responsibilities.

A. The tutor is responsible for supervising and guiding the law clerk's education, and for setting an example of the highest ethical and professional conduct. The tutor has an obligation not only to instruct the law clerk, but to ensure only fully competent law clerks are deemed to be qualified to sit for the bar examination.

B. In addition to any other requirements, a potential tutor shall appear for an interview, provide any additional information or proof, or cooperate in any investigation, as may be directed by the Board.

C. The tutor is required to continue to meet the qualifications for a tutor established in APR 6 and remain in good standing throughout the period of the clerkship.

D. In addition to the "personal supervision" required by APR 6, defined as time actually spent with the law clerk for the exposition and discussion of the law, the recitation of cases, and the critical analysis of the law clerk's written assignments, the tutor's responsibilities include:

(1) Guiding and assisting the law clerk's study of each subject, using the course descriptions as a basic outline of course content and emphasizing pertinent state law;

(2) Choosing textbooks, casebooks, and other written, legal materials, selected from those in use at any law school approved by the Board of Governors as defined in the WSBA Admissions Policies, to guide the law clerk through the subject matter of each course;

(3) Assisting the law clerk in planning the sequence and timing of each prescribed course and of the fourth-year curriculum;
(4) Evaluating the law clerk's progress;
(5) Developing, administering, and grading the monthly examinations;
(6) Providing written comments on a graded monthly exam to the law clerk and submitting the required certificate to the Board within 10 days of the end of the month in which the exam was administered;
(7) Assigning the law clerk tasks and duties which are intended to contribute to the law clerk's understanding of the practical aspects of engaging in the practice of law; and
(8) Providing the law clerk with an adequate work station and with reasonable access to an adequate law library.

4-2Assistant Tutors. When an assistant tutor is proposed to teach a course instead of the primary tutor, the Board may approve the application(s) of one or more assistant tutors for up to 6 months of each year of study. The assistant tutor may teach only the course(s) for which the assistant tutor was approved by the Board. Informal assistance to a lesser degree, by other lawyers, judges or staff is generally acceptable without specific approval.

A. Qualification. The assistant tutor shall meet all the qualifications and continuing qualifications established for the tutor in APR 6 and these regulations, except the assistant tutor shall have been actively and continuously engaged in the practice of law or have held the required judicial position for at least five years immediately preceding the commencement of the assistant tutorship.

B. Scope of Delegation.

(1) The assistant tutor may undertake the following duties for the course(s) for which the assistant tutor is approved:

i. Personal supervision as defined by APR 6(d)(2)

ii. Choosing textbooks, casebooks, and resource materials for the course.

iii. Guiding and assisting the law clerk's study of the subject, using the course description as a basic outline of course content and emphasizing pertinent state law.

iv. Developing, administering, and grading the monthly examination.

(2) The primary tutor shall:

i. In consultation with the assistant tutor, determine if the law clerk passed or failed the course;

ii. Remain ultimately responsible for the conduct of the law clerk;

iii. Complete all monthly and other certificates; and

iv. Appear with the law clerk at all oral evaluations with the Board, although the assistant tutor may also be in attendance where appropriate.

Regulation 5. COURSE OF STUDY

5-1 Structure.

A. The program is designed to be a four year course of study in combination with employment. Each year consists of 12 months during which the law clerk is required to study 6 subjects, pass 12 exams and submit 3 book reports.

B. The program is structured so the law clerk studies only one subject at a time and passes it before beginning the next subject. All courses in a given year, including jurisprudence reading, must be

completed before the law clerk may study courses in a subsequent year. A law clerk may not take more course work in any calendar year than is prescribed by these regulations without prior Board approval. The length of time to be devoted to each subject is prescribed by regulation.

C. A law clerk may take leave or vacation in increments of one month upon written notice to the Board. A law clerk may take leave of longer than one month only upon advance written request and approval by the Board. Exceptions for emergency medical situations may be considered. A law clerk may not request leave of more than 12 consecutive months.

5-2 Subjects.

A. Jurisprudence Reading. Every law clerk is required to take the Jurisprudence course, which is a four year reading program, intended to familiarize the law clerk with legal history, philosophy, theory and biography.

B. First Year. To complete the first year of the program, the law clerk shall pass the following prescribed courses. The course entitled "Basic Legal Skills" shall be studied and passed first. Thereafter, the courses may be studied in any order.

Course	**Months**
Basic Legal Skills	2
Civil Procedure	2
Torts	2
Contracts	2
Agency & Partnerships	2
Property	2

C. Second Year. To complete the second year of the program, the law clerk shall pass the following prescribed courses, in any order:

Course	**Months**
Community Property	1
Criminal Law	2
Constitutional Law I	2
Corporations	2
Evidence	2
Uniform Commercial Code	3

D. Third Year. To complete the third year of the program, the law clerk shall pass the following prescribed courses, in any order:

Course	Months
Constitutional Law II	2
Professional Responsibility	1
Domestic Relations	2
Wills, Estates, Trusts, Probate	3
Conflict of Laws	2
Criminal Procedure	2

E. Fourth Year. The fourth year of the program is devoted to elective subjects. The law clerk, in consultation with the tutor, shall develop a fourth year curriculum of six electives. The law clerk shall then make a written petition to the Board, at least six months prior to the commencement of the fourth year, for approval of the proposed fourth year course of study.

(1) Under no circumstances will approval or recognition be given to courses directed to fulfillment of a continuing legal or other professional education requirement, or intended to provide a preparation for a bar examination, or taught through correspondence or any equivalent.

(2) Recommended Electives. The following electives are recommended because they will broaden the law clerk's legal background, perspective, and skills. A law clerk may petition the Board for approval of alternative areas of study by including a detailed course description for each proposed course.

Course	Months
Administrative Law	2
Personal Federal Income Tax	2
Land Use	2
Labor Law	2
Remedies	2
Antitrust	2
Creditor-Debtor Relations	2
Securities Regulation	2
Legal Accounting	2
International Law	2
Insurance	2
Consumer Protection	2
Environmental Law	2
Real Property Security	2
American Indian Law	2
Trial Practicum	2
Elder and Disability Law	2

5-3Monthly Examinations. The tutor is responsible for the content and administration of all monthly examinations.

A. Content. Although no specific substantive content is prescribed by the Board, it is anticipated such an examination will test the law clerk's comprehension of the current subject matter, and the law clerk's understanding of the ethical, professional and practical aspects of practicing law.

B. Course Descriptions. The course descriptions in Regulation 7 state the minimum level of knowledge the Board expects a law clerk to obtain in each subject, and provide guidance to the tutor in formulating monthly examinations.

C. Timing. The tutor shall administer an examination covering that month's subjects to the law clerk on or before the last day of each month.

D. Grading. All courses in the program are to be graded as pass/fail only. "Pass" means that the law clerk has exhibited reasonable comprehension of the theory and practice of any given subject to the satisfaction of the tutor and the Board. If a law clerk earns a "Fail" grade the law clerk shall continue to study the subject for an additional month.

E. Certificates. Within 10 days following the month of study, the law clerk or tutor shall submit the exam, including the grade given for the examination and written comments to the law clerk, and the tutor shall submit a monthly certificate, stating the law clerk's hours engaged in employment, study and the tutor's personal supervision.

(1) If an exam is not given, the monthly certificate shall be submitted stating the reason.

(2) The date of receipt will be recorded. A pattern of late certificates may be cause for remedial action or termination from the program.

5-4Board Evaluations. At intervals as may be established by the Board, the Board shall conduct an evaluation at which the law clerk and the tutor shall be personally present. The law clerk and the tutor shall be personally present when required by the Board.

A. The Board will not normally test the law clerk's substantive knowledge, but may do so to evaluate whether or not the law clerk is progressing satisfactorily in the program.

B. Materials. In making its evaluation, the Board may consider:

(1) The substantive contents of all monthly examinations;

(2) The tutor's monthly certificates and timeliness of receipt;

(3) Any written course work; and

(4) Any other written or oral materials deemed to be pertinent by the Board.

C. Decision. At the conclusion of the evaluation, the Board may:

(1) Determine the law clerk has successfully mastered the preceding year's course work and is eligible and authorized to begin the next year of the program;

(2) Determine the law clerk has satisfactorily completed the program and is qualified to sit for the bar examination, subject to any other requirements for sitting for the bar examination as set forth in the Admission and Practice Rules;

(3) Advise the tutor regarding the quality, timeliness, or appropriateness of coursework, exams, and certificates;

(4) Direct the law clerk to repeat designated prescribed or elective courses, devote more time to each course, take remedial legal or nonlegal instruction, appear before the Board at more frequent intervals for an examination which may be written or oral;

(5) Require the law clerk to change tutors;

(6) Advise the law clerk that the law clerk's enrollment in the program is terminated.

D. At the conclusion of any evaluation, the Board will provide a brief written summary of its decision to the law clerk and to the tutor.

Regulation 6. WITHDRAWAL AND TERMINATION OF ENROLLMENT

6-1 Withdrawal by Law Clerk.

A. Voluntary. A law clerk who wishes to withdraw from the program shall notify the Board in writing, filed as required by Regulation 2-4.

6-2 Withdrawal by Tutor.

A. Voluntary. A tutor who wishes to withdraw from that position shall notify the Board and the law clerk in writing, filed as required by Regulation 2- 4.

B. Involuntary. If a disciplinary sanction is imposed upon a tutor, the tutor will be deemed to have withdrawn from that position. The Board may determine that the imposition of a sanction does not necessitate automatic withdrawal.

C. The Board may direct a law clerk to change tutors if approval of a tutor is withdrawn.

6-3 Termination of Enrollment by the Board.

A. The Board must terminate a law clerk's participation in the program for:

(1) Failure to complete the prescribed course of study within 6 years from the date of enrollment; or

(2) A determination by the Board that the clerk does not meet the character or fitness requirement for continued enrollment in the program

B. The Board may terminate a law clerk's participation in the program when the law clerk

(1) Is absent from the program for more than one month in any calendar year without the Board's prior approval of a petition for a leave of absence. Failure to submit exams and tutor's certificates shall be interpreted as absence from the program;

(2) Takes a leave from the program for more than 12 consecutive months;

(3) Fails to pay the annual fee by the established deadline; or

(4) Fails to otherwise comply with the requirements of the program or a decision or order of the Board.

Regulation 7. COURSE DESCRIPTIONS

7-1Jurisprudence Reading. A four-year course of reading consisting of three (3) books each year, to be selected from a list approved by the Board. The Board has discretion to select and require specific books which must be read to meet this requirement.

A. Upon completion of each book, the law clerk shall prepare and submit to the Board a short book report. Reports should be submitted every 4 months.

B. A year's coursework shall not be deemed completed unless the book reports are submitted. A law clerk may not begin the next year's course work until the current year's book reports are completed

and submitted to the Board.

7-2 First Year Clerkship.

A. Basic Legal Skills. Introduction to basic legal reference materials (including judicial, legislative and administrative primary and secondary sources) and their use; techniques of legal reasoning, analysis and synthesis; legal writing styles. Familiarization with the structure of the federal and state court systems; the concept of case law in a common law jurisdiction; fundamental principles of stare decisis and precedent; the legislative process; principles of statutory construction and interpretation. Law Clerk should be assigned projects of increasing difficulty such as: case abstracts; analysis of a trial record to identify issues; short quizzes to demonstrate ability to locate primary and secondary sources; office memoranda or a trial oriented memorandum of authorities to demonstrate ability to find the law applicable to a factual situation and to differentiate unfavorable authority; an appellate level brief.

B. Civil Procedure. Fundamentals of pleading and procedure in civil litigation, as structured by the Federal Rules of Civil Procedure and the Washington Superior Court Civil Rules. Study shall include: jurisdiction over the person and subject matter; venue; time limits; commencement of actions; pleadings; parties; impleader; interpleader; motions; class actions and intervention; res judicata and collateral estoppel; discovery and other pretrial devices; joinder; summary judgment; judgments; post-trial motions. Law Clerk should be required to draft summons; pleadings; motions; findings of fact and conclusions of law; judgment; interrogatories; requests for admission.

C. Contracts. Study of legal principles related to the formation, operation and termination of the legal relation called contract. General topics include: offer and acceptance; consideration; issues of interpretation; conditions; performance; breach; damages or other remedies; discharge; the parol-evidence rule; the statute of frauds; illegality; assignments; beneficiaries.

D. Property. Study of the ownership, use, and transfer of real property in both historical and modern times. Topics include: estates and interests in land; concurrent ownership; easements; equitable servitudes; conveyances; real estate contracts; nuisance; adverse possession; land use controls; landlord-tenant; the recording system; title insurance.

E. Torts. Study of the historical development, principles, concepts and purposes of the law relating to redress of private injuries. Topics include: conversion; trespass; nuisance; intentional tort; negligence; strict liability; products liability; concepts of duty, causation, and damage; limitations on liability such as proximate cause, contributory negligence, assumption of the risk, immunity; comparative negligence.

F. Agency and Partnership. Legal principles of agency law including definition of the agency relationship, authority and power of agents, notice and knowledge, rights and duties between participants in the relationship, termination of agency relationship, master-servant relationship. Partnership law using the Revised Uniform Partnership Act as a model code. Topics include: formation, partners' rights and duties between themselves, powers, unauthorized acts, notice and knowledge, incoming partner liability, indemnification, contribution, partner's two-fold ownership interest, co-ownership interests and liabilities, creditor's claims and remedies, dissolution events, winding up, distribution of asset rules. Study of the Uniform Limited Partnership Act and joint venture law.

7-3 Second Year Clerkship.

A. Community Property. Relationship necessary for creation of community property, classification of property as community or separate, management and control of community assets, rights of creditors, disposition of community property upon dissolution of the community, problems of conflict of laws encountered in transactions with common-law jurisdictions.

B. Criminal Law. Study of substantive criminal law including concepts such as elements of criminal responsibility; principles of justification and excuse; parties; attempts, conspiracy; specific crimes; statutory interpretation; some introduction to sentencing philosophies and to juvenile offender law.

C. Constitutional Law I. Course covers basic constitutional document, excluding the Bill of Rights. Topics include: taxing clause, commerce clause, contract clause, war power and treaty power. Allocation and distribution of power within the federal system, and between federal and state systems, including economic regulatory power and police power; limitations on powers of state and national governments; constitutional role of the courts.

D. Corporations. Business corporations for profit using the Model Business Corporations Act and state law provisions. Topics include: promotion, formation and organization; theories of corporations; corporate purposes and powers; disregard of corporateness; common law and statutory duties and liabilities of shareholders, directors, and officers; allocation of control, profit and risk; rights of shareholders; derivative suits and class action suits by shareholders; mergers and consolidations, sale of assets, and other fundamental changes in corporate structure; corporate dissolution; SEC proxy rules and Rule 10(b)(5).

E. Evidence. Rules of proof applicable to judicial trials. Topics include: admission and exclusion of evidence, relevancy, hearsay rule and its exceptions, authentication of writings, the best evidence rule, examination and competency of witnesses, privileges, opinion and expert testimony, demonstrative evidence, presumptions, burden of proof, judicial notice.

F. Uniform Commercial Code. Course covers Articles I, II, III, IV, VI, VII, and X of the Uniform Commercial Code. Course first examines problems in the sale of goods as governed by Article II (with a brief survey of its antecedents) including: warranty, risk of loss, acceptance and rejection, tender of delivery, revocation, remedies for breach of contract. Some discussion of other laws relating to warranties, Article VI on Bulk Sales, and Article VII on documents of title and bills of lading. Course next examines commercial paper, bank deposits and collections under UCC Articles III and IV, including: formation and use of negotiable instruments with an emphasis on checks, rights and liability of parties to negotiable instruments, defenses to liability, study of bank collection process and bank's relationship with its customers. Course finally examines secured transactions under UCC Article IX, including: types of security interests, perfection of such interests, priority of claims, rights to proceeds of collateral, multi-state transactions, rights of parties after debtor's default.

7-4 Third Year Clerkship.

A. Constitutional Law II. Course examines the Bill of Rights. Topics include: free speech, prior restraint, obscenity, libel, fair trial and free press, loyalty oaths, compulsory disclosure laws, sedition and national security, picketing, symbolic conduct, protest, subversive advocacy; due process; equal protection development and analysis; fundamental rights and entitlements; religious clause; jury trial

right in civil actions; constitutional protection and interpretation under state as contrasted to federal constitutional documents.

B. Professional Responsibility. Study of legal ethics and a lawyer's roles in society, including lawyer-client relations, lawyer-public relations, and a lawyer's responsibility to the courts and the profession. Topics also include: organization of an integrated bar, Supreme Court's supervisory powers, professional service corporations, pre- paid legal services arrangements, malpractice, the Admission to Practice Rules, the Rules for the Enforcement of Lawyer Conduct, the Rules of Professional Conduct and the ABA Model Rules of Professional Conduct.

C. Domestic Relations. Study of the substantive and procedural law affecting the formation, disintegration and dissolution of family relations, including those of husband and wife, parent and child, and non-marital. Topics include: jurisdiction, procedure, costs, maintenance, child support, property division, custody, modification and enforcement of orders, some discussion of conflict of laws, taxation, URESA and UPA.

D. Wills, Estates, Trusts, Probate. Study of the voluntary transmission of assets in contemplation of and at death. Topics include: disposition by will, creation of and disposition by a trust, effectiveness of the disposition in the creation of present and future interests in property, intestate succession, construction problems, powers of appointment, restrictions on perpetuities and accumulations, alternative methods of wealth transmission, some introduction to the basic tax framework important in formulating plans of disposition, and fiduciary administration and management of decedent's estates and trusts.

E. Conflict of Laws. Study of that part of the law that determines by which state's law a legal problem will be solved. Topics include: choice-of-law problems in torts, contracts, property, domestic relations, administration of estates, and business associations.

F. Criminal Procedure. Constitutional doctrines governing criminal procedure. Topics include: Fourth, Fifth, Sixth and Eighth Amendments, pertinent due process provisions of Fourteenth Amendment; search and seizure, confessions, identification procedures, right to counsel, arrest, jury trial, double jeopardy, and pertinent provisions of the state constitution. The Superior Court Criminal Rules are examined as they relate to the procedural aspects of raising the constitutional issues.

7-5 Fourth Year Clerkship;Electives.

A. Administrative Law. Study of the administrative process and its role in the legal system. Subjects include: powers and procedures of administrative agencies, relationship of administrative agencies to executive, judicial and legislative departments of government.

B. Personal Federal Income Tax. Examination of federal income tax law as it applies to individuals, but not in their role as partners, shareholders, or beneficiaries of trusts or estates. Topics include: concepts of income, gross income, net income, when income should be taxed, to whom it should be taxed and its character as unearned, earned or capital gain income. Deductions are also examined in detail.

C. Land Use. Study of legal principles and constitutional limitations affecting systems for public regulation of the use of private land. Topics include: planning, zoning, variances, special use permits, subdivision controls, environmental legislation, nuisance, eminent domain, powers of public agencies, "taking" without just compensation, due process, administrative procedures and judicial review, exclusionary zoning and growth control.

D. Labor Law. Study of the organizational rights of employees and unions and the governance of the use of economic force by employers and unions. Other topics include the duty to bargain collectively, the manner in which collective bargaining is conducted, subjects to which it extends, administration and enforcement of collective bargaining agreements, and relations between a union and its members.

E. Remedies. Historical development and use of judicial remedies that provide relief for past or potential injuries to interests in real or personal property. Topics include: history of equity, power of equity courts, restitution, specific performance, injunctions, equitable defenses, compensatory and punitive damages, unjust enrichment, constructive trusts, equitable liens, tracing and subrogation.

F. Antitrust. An examination of the antitrust laws including the Sherman Act, Clayton Act, Robinson-Patman Act, Federal Trade Commission Act; and topics such as monopolies, restraint of trade, mergers, price fixing, boycotts, market allocation, tieing arrangements, exclusive dealing and state antitrust law.

G. Creditor-Debtor Relations. Rights and remedies of creditors and debtors under the Federal Bankruptcy Code, particularly in straight bankruptcy cases and under state laws relating to judgments, judgment liens, executions, attachments, garnishments, fraudulent conveyances, compositions, assignments for the benefit of creditors, and debtor's exemptions.

H. Securities Regulation. Study of legal control over the issuance and distribution of corporate securities. Topics include: registration and distribution of securities under the Federal Securities Act of 1933, including the definition of a security; basic structure, applicability, and prohibitions of the Act; underwriting; preparation, processing and use of registration statement and prospectuses; exemptions from registration under the Act, including Regulation A, private offerings, and business reorganizations and recapitalizations; secondary distributions; brokers transactions; and civil liability for violation of the Act. Registration, distribution and regulation of securities under state "blue sky" laws, including the State of Washington Securities Act. Regulation of franchise arrangements under the Federal Securities Act of 1933 and the State of Washington Franchise Investment Protection Act. Regulation of national securities exchanges and broker- dealers; registration and listing of securities on national securities exchanges; periodic reporting and public disclosure of information requirements for companies whose securities are traded on national securities exchanges; and civil liability for violation of the Act. Regulation of mutual funds and other types of investment companies under the Federal Investment Company Act of 1940.

I. Legal Accounting. Bookkeeping, use of journals and ledgers, analysis of financial statements, professional responsibility of a lawyer to a corporate client and relationship to accountants involved in a client's financial affairs. Course also addresses lawyer's accounting and recordkeeping obligations to his or her client under the Rules of Professional Conduct or its successor.

J. International Law. Legal process by which interests are adjusted and authoritative decisions made on the international level. Topics include: nature and source of international law, law of treaties, jurisdiction, some discussion of international legal organizations, state responsibility and international claims for wrongs to citizens abroad, and application of international law in United States courts.

K. Insurance. Legal principles governing formal mechanisms for the distribution of risk of loss. Emphasis is on property, casualty, life insurance. Topics include: marketing of insurance, indemnity principle, insurable interest, amount of recovery and subrogation, persons and interests protected, brokers, and identification of risks transferred by insurance.

L. Consumer Protection. Selected laws for protection of consumers, including federal, state and local laws that prohibit deceptive advertising, mandate disclosure of information, regulate credit practices, license occupations, establish quality standards for products and services, and condemn "unfair" practices. Emphasis on the theoretical justifications for governmental intervention in the marketplace. Attention to problems of consumer justice administration, including informal dispute resolution procedures and representation of consumer interests in administrative and legislative proceedings.

M. Environmental Law. Survey of citizen, legislative, administrative and judicial action in response to the reality and the threat of man-induced alteration to the natural environment; focuses on National Environmental Policy Act, federal air and water pollution control legislation, state air and water pollution control statutes and shoreline management.

N. Real Property Security. Methods by which an obligation may be secured by real property of the obligor or of a third person. Covers the common- law principles and statutes that regulate the creation, operation, and extinguishment of the legal relations known as the real property mortgage and deed of trust, considered in the context of financing the purchase or development of land. Some attention must be given to principles governing operation of the lendingindustry.

O. American Indian Law. Tribal/state/federal judicial and legislative jurisdiction in Indian country. Criminal and civil jurisdiction. Indian religious freedom. Indian water rights. Special hunting and fishing rights. History of federal laws and policies towards Indians. Current federal law and policy. Judicial trends in Indian cases. The federal trust responsibility toward Indian tribes; tribal powers of self government. Tribal courts. Federal supremacy (preemption) over state law in Indian country.

P. Trial Practicum. Advanced course in preparing for trial. Resources should include sample cases and text books as well as evidence and civil rules. The clerk will write a fully researched brief, motions in limine, prepare ER 904; prepare objections to opposition motions in limine and ER 904; argue pretrial motions; research and perform voir dire; prepare and give an opening statement; prepare and give a direct exam with introduction of multiple exhibits; prepare and give a cross exam with introduction of exhibits; draft and argue jury instructions; prepare and give a closingstatement.

   Then to be assigned an actual case in litigation and add to the above, a mock trial which includes: prepared statement of the "story" of the case; illustrate how each witness fits into the story and what evidence is to be used with each witness; develop direct examination of one witness, cross examination of one witness and at least one exhibit for each witness; prepare and give an opening; conduct voir dire of volunteers; examine a witness; handle objections; and argue sample motions in limine. The clerk is expected to attend court proceedings regularly, and participate to the extent permitted by APR 9, iflicensed.

Q. Elder and Disability Law. An examination and study of the complex legal needs of people who are elderly and people who have a disability. This course examines major issues and substantive laws affecting people who are elderly or who have a disability including income protection, asset preservation and protection, options for financing long-term care and healthcare, planning for

incapacity and the use of traditional and nontraditional estate and life care planning devices such as wills, trusts, special needs trusts, powers of attorney, guardianships, adult protection actions and other devices but in the context of the needs of people who are elderly or who have a disability. This course will also address the special ethical challenges and concerns of lawyers who are practicing elder and disability law.

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: August 11, 2025

RE: Committee on Professional Ethics New Advisory Opinion – For Information Only

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Committee on Professional Ethics New Advisory Opinion – For Information Only

INFORMATION ONLY: This New Advisory Opinion addresses an issue involving a lawyer purchasing a law firm from another lawyer who plans to cease the active practice of law. In this instance, the purchasing lawyer has not practiced with the selling lawyer. The question is whether the purchasing lawyer may continue to include the name of the selling lawyer in the firm name going forward.

The RPCs that are contained in this opinion are RPC 1.17 and RPC 7.1.

Background

In May 2024, the Committee on Professional Ethics (CPE) received an inquiry from a lawyer who was acquiring an entire law practice from a lawyer who planned to cease the active practice of law. The purchasing lawyer was not then practicing with, and had not previously practiced with, the selling lawyer. But the purchasing lawyer stated a desire to use the name of the acquired firm or to include the selling lawyer's name in the name of the purchasing lawyer's firm.

The inquiry was assigned to a subcommittee of the CPE. Prior to the June, 2024, meeting at which the new Advisory Opinion was approved, the subcommittee had reached out for comment on a draft opinion from the Washington Society of Health Care Attorneys, Washington Lawyers for the Arts, the Washington Defense Trial Lawyers, the Washington State Association for Justice, and the Employment Lawyers Association. No comments were received.

Advisory Opinion Question, Analysis and Conclusion

This AO addresses a single question: Whether a lawyer who purchases an entire law practice from a lawyer who ceases the active practice of law may continue to include the name of that selling lawyer in the firm name, with or without also using the name of the purchasing lawyer.

The AO concludes that under the Washington State RPCs, the lawyer who purchases an entire law practice from a lawyer who is ceasing the active practice of law may not include the name of the selling lawyer in the firm name if the selling lawyer is not associated with the purchasing lawyer's firm.

RPC 1.17 states that a "lawyer or a law firm may sell or purchase a law practice, or an area of law practice, including good will…." Good will is a law firm asset that may be sold by a retiring lawyer. In some jurisdictions the firm name is treated as an element of that good will, which may be conveyed with such a sale so long as care is taken to protect clients and the general public from false or misleading communications about the purchasing lawyer and the withdrawing lawyer.

RPC 7.1 provides that a lawyer "shall not make a false or misleading communication about the lawyer or the lawyer's services. A communication is false or misleading if it contains a material misrepresentation of fact or law, or omits a fact necessary to make the statement considered as a whole not materially misleading."

Washington Comment [10] to RPC 7.1 states that a firm may be designated by the names of all or some of its members, by the names of deceased members where there has been a continuing succession in the firm's identity or by a trade name such as the "ABC Legal Clinic." That Comment observes that any firm name including the name of a deceased partner is a trade name, and that the use of such names to designate law firms has proven a useful means of identification. However, Comment [10] states that "*it is misleading to use the name of a lawyer or LLLT not associated with the firm or a predecessor of the firm, or the name of an individual who is neither a lawyer nor an LLLT.*"

The new Advisory Opinion observes that it could be argued that when a lawyer purchases a firm from a selling lawyer who ceases practice, the purchasing lawyer should be able to use the name of the withdrawing lawyer on grounds that the selling lawyer was associated with "a predecessor firm." In the opinion of this Committee, that view is at best a strained interpretation of the meaning of "predecessor firm," Accordingly, the Advisory Opinion concludes that a purchasing lawyer's use of the selling lawyer's name in the circumstances discussed, cannot be reconciled with the last sentence of Washington Comment [10] to RPC 7.5, quoted immediately above in italics.

Attachment
WSBA Ethics Advisory Opinion

WASHINGTON STATE
BAR ASSOCIATION

Advisory Opinion: _____

Year Issued: **2025**

RPCs: 1.17, 7.1

Subject: Use of Non-Practicing Lawyer's Name in Firm Name by the Purchaser of a Law Practice

Summary: *This opinion discusses whether a lawyer who purchases an entire law practice from a lawyer who plans to cease the active practice of law may continue to include the name of that selling lawyer in the firm name following the acquisition. In order to protect clients and the general public from false or misleading communications, the selling lawyer's name may not be used in the firm's name if they are not associated with that firm.*

Facts: A lawyer is acquiring an entire law practice from a lawyer who plans to cease the active practice of law. The purchasing lawyer is not then practicing with, and has not previously practiced with, the selling lawyer. But the purchasing lawyer desires to use the name of the acquired firm or to include the selling lawyer's name in the name of the purchasing lawyer's firm.

Issue Presented: Whether a lawyer who purchases an entire law practice from a lawyer who ceases the active practice of law may continue to include the name of that selling lawyer in the firm name, with or without also using the name of the purchasing lawyer.

Short Answer: The lawyer who purchases an entire law practice from a lawyer who is ceasing the active practice of law may not include the name of the selling lawyer in the firm name if the selling lawyer is not associated with the purchasing lawyer's firm.

Applicable Rules of Professional Conduct:

RPC 1.17 states that a "lawyer or a law firm may sell or purchase a law practice, or an area of law practice, including good will…." The commentary to RPC 1.17 states that the rule "requires that the seller's entire practice, or an entire area of practice, be sold…." Comment [6] to RPC 1.17 (Washington revision) [1].

RPC 7.1 provides:

> A lawyer shall not make a false or misleading communication about the lawyer or the lawyer's services. A communication is false or misleading if it contains a material misrepresentation of fact or law, or omits a fact necessary to make the statement considered as a whole not materially misleading.

The commentary to RPC 7.1 states, in part:

> [10] A firm may be designated by the names of all or some of its members, by the names of deceased members where there has been a continuing succession in the firm's identity or by a trade name such as the "ABC Legal Clinic." A lawyer or law firm may also be designated by a distinctive website address or comparable professional designation. Although the United States Supreme Court has held that legislation may prohibit the use of trade names in professional practice, use of such names in law practice is acceptable so long as it is not misleading. If a private firm uses a trade name that includes a geographical name such as "Springfield Legal Clinic," an express disclaimer that it is a public legal aid agency may be required to avoid a misleading implication. It may be observed that any firm name including the name of a deceased partner is, strictly speaking, a trade name. The use of such names to designate law firms has proven a useful means of identification. *However, it is misleading to use the name of a lawyer or LLLT not associated with the firm or a predecessor of the firm, or the name of an individual who is neither a lawyer nor an LLLT.*

Comment [10] to RPC 7.1 (emphasis added).

Discussion:

If the selling lawyer does not cease the active practice of law, which is not a requirement of RPC 1.17, use of the selling lawyer's name by the purchasing lawyer is prohibited because it would be misleading. See Comment [10] to RPC 7.1; WSBA Advisory Op. 1994 (2002) (firm may not use the name of a former partner in firm name where former partner relocated to California but intended to continue to practice law in California). The question of whether it is misleading to do so if the selling lawyer ceases the active practice of law is more nuanced.[2]

Over the past four decades, the WSBA has issued about two dozen advisory opinions on firm names. All of them were published prior to the repeal of RPC 7.5 in 2018, and none of them are precisely on point with respect to the issue in question. At one time, RPC 7.5 focused specifically on firm names and letterheads. When RPC 7.5 was reserved in 2021, some aspects of the former RPC 7.5 were included in Comment [10] to RPC 7.1, quoted above. The "touchstone of RPC 7.1 is "to prevent clients and the general public from being subjected to false and misleading communications…. So long as a firm name put before the public [is] not materially misleading, when considered as a whole…it would not be objectionable." Hazard, Hodes, Jarvis & Thompson, The Law of Lawyering §63.02 (2024).

Although published before the deletion of RPC 7.5, WSBA Advisory Opinion 2164 (2007) provides the Washington opinion closest to addressing the question of use of a former lawyer's name be a lawyer who purchased that lawyer's practice. It states, in part:

> A firm may not use a firm name that is misleading or implies a partnership where none exists. RPC 7.1; RPC 7.5. Prior opinions of the Committee make clear that a firm may continue to use the name of a former partner where the former partner is deceased, fully retired or inactive, or maintains some ownership stake in the firm. See Informal Opinions 1144 (1987), 1231 (1988), 1571 (1994), 1868 (1999), and 1994 (2002). Since you have

sold your interest in the firm and are not fully retired neither you nor your former law partner may use the original name.

Under RPC 1.17, good will is a law firm asset that may be sold by a retiring lawyer. In some jurisdictions the firm name is treated as an element of that good will, which may be conveyed with such a sale so long as care is taken to protect clients and the general public from false or misleading communications about the purchasing lawyer and the withdrawing lawyer. [3] Such jurisdictions allow the name of a lawyer who has ceased practicing law to continue to be included in a firm's name so long as care is taken to prevent the public from being led to believe that the withdrawing lawyer is still practicing law with the firm. [4]

As noted above, Washington's Comment [10] to RPC 7.1 states that "it is misleading to use the name of a lawyer or LLLT not associated with the firm or a predecessor of the firm." [5]

If a selling lawyer continues to actively practice law elsewhere following the sale of a law practice, it is misleading for the purchasing lawyer to use the name of the selling lawyer in the purchasing lawyer's firm name. Based on Comment [10] to RPC 7.1, it is also misleading to use the name of a selling lawyer even if that lawyer ceases actively practicing law, because that lawyer is not associated with the firm or a predecessor of the purchasing lawyer's firm.

It might be argued that when a lawyer purchases a firm from a selling lawyer who ceases practice, the purchasing lawyer should be able to use the name of the withdrawing lawyer on grounds that the selling lawyer was associated with "a predecessor firm." In the opinion of this Committee, that view is at best a strained interpretation of the meaning of "predecessor firm"; accordingly, a purchasing lawyer's use of the selling lawyer's name in those circumstances cannot be reconciled with the last sentence of Comment [10] to RPC 7.5, quoted above.

ENDNOTES

[1] A potentially significant difference between Washington's RPC 1.17 and the ABA's Model Rule 1.17 is that Washington has deleted MR 1.17(a), which requires that the: "[t]he seller [must cease] to engage in the private practice of law, or in the area of practice that has been sold," in the relevant geographic area or jurisdiction.

[2] A lawyer who ceases the active practice of law may formally do so in several ways and assume various types of license statuses under the WSBA Bylaws and the Admission and Practice Rules. For example, a lawyer may voluntarily resign, become an inactive member or a Pro Bono member, or become a judicial member upon taking certain judicial positions. Lawyers may also continue to practice in limited circumstances as Pro Bono members under APR 3(g).

[3] For a discussion of good will in the context of a firm's name, see New York State Bar Association, Committee on Professional Ethics Opinion 1168 (05/13/2019), and Utah State Bar Ethics Advisory Opinion 21-02 (2021)

[4] For example, North Carolina's RPC 1.17 has a Comment [13] that says, in part, that after purchase, a law practice may retain the same name but that the "seller's retirement

or discontinuation of affiliation with the law practice must be indicated on letterhead and other communications…to avoid misleading the public as to the seller's relationship to the law practice." That is helpful guidance, although Washington does not have a comparable comment. See also Illinois State Bar Association Professional Conduct Advisory Opinion No. 20-04 (2020).

[5] That language derives from Comment [1] to Model Rule 7.5 as originally adopted it in 1983; it continued as part of the Model Rule Comment until 2018, when Model Rule 7.5 was deleted. At that time, Comment [1] to Model Rule 7.5 was relocated, with some changes, to Comment [5] to Model Rule 7.1. The ABA dropped the sentence that the Washington Supreme Court has chosen to retain, but the Model Rule comment continues to state that "A law firm name or designation is misleading if it implies a connection …with a lawyer not associated with the firm or a predecessor firm [or] with a nonlawyer...."

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: August 11, 2025

RE: Committee on Professional Ethics New Advisory Opinion – For Information Only

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Committee on Professional Ethics New Advisory Opinion – For Information Only

INFORMATION ONLY: New Advisory Opinion 2025 addresses the issues that arise in connection with disputed trust account funds. The Advisory Opinion reviews and synthesizes past advisory opinions to establish general principles for lawyers to follow before turning to two additional situations: (i) A client and third party who deposited trust account funds dispute who is entitled to receive funds remaining after the legal representation ends; and (ii) Multiple clients who contributed funds for joint representation and who dispute how to divide funds held in trust after representation ends.

The RPCs considered in this advisory opinion include RPCs 1.1, 1.3, 1.4, 1.7, 1.15A, and 4.3.

Background:

The CPE decided to prepare this advisory opinion following numerous related queries from individual lawyer members of the WSBA to the WSBA Ethics Line about different situations involving disputed funds held in lawyer trust accounts. Following referral to subcommittee, it was determined that prior advisory opinions could usefully be referenced and synthesized according to general principles while also addressing two additional situations which had not been previously the subject of an advisory opinion. Following assignment of this advisory opinion to a subcommittee of the CPE and prior to the June, 2025, a discussion draft of the advisory opinion was circulated for notice and comment to WSBA section leaders. No comments were received, and the advisory opinion was unanimously approved by the CPE on June 27, 2025.

Attachment
WSBA Ethics Advisory Opinion

Advisory Opinion: 2025__

Year Issued: 2025

RPCs: 1.1, 1.3, 1.4,1.7, 1.15A, 4.3

Subject: Disputed Funds Held in Trust

ISSUE

How should a lawyer handle disputed trust account funds?

SHORT ANSWER

Most of the duties owed by lawyers—including but not limited to the duties of competent representation and loyalty—are owed to clients rather than to nonclients. Nonetheless, there are also times when lawyers owe duties to nonclients. This Advisory Opinion addresses one set of circumstances in which such duties may be owed.

RPC 1.15A(f) requires that, "Except as stated in this Rule, a lawyer must promptly pay or deliver to a client or third person the property [including any funds] which the client or third person is entitled to receive." After this is done, RPC 1.15A(g) requires that the lawyer maintain in trust any property whose ownership is disputed until the dispute is resolved while also "tak[ing] reasonable action to resolve the dispute, including, when appropriate, interpleading the disputed funds." Washington Comment [9] to RPC 1.15A adds by way of explanation that "the extent of the efforts that a lawyer is obligated to take to resolve a dispute depend on the amount in dispute, the availability of methods for alternative dispute resolution, and the likelihood of informal resolution."

To comply with these requirements, a lawyer must communicate with each potential claimant to determine the basis of that person's claim and that person's response to any claims made by others. Unless the lawyer already has this knowledge, the lawyer must also conduct at least a preliminary analysis of the strength of each person's claim, including whether there is documentation to support each claim.

As further explained below, the nature and extent of the lawyer's obligations after that point will depend in part on this assessment and in part on whether the lawyer's client or the lawyer are among the claimants. Nonetheless, it is not the lawyer's job to adjudicate material issues of fact or law.

ANALYSIS

There are many situations in which a lawyer may hold funds that are subject to multiple competing claims. Prior Advisory Opinions have addressed some of them:

- An insurance company asserting a contractual subrogation or other claim against funds held in trust for a client by a lawyer. [n.1]

- A lawyer who had received a deposit from a now-deceased client. [n.2]
- A creditor of a client asserting a claim based on the lawyer's guarantee [n.3] or a writ of garnishment. [n.4]

The General Principles section of this opinion below can be considered as a partial supplement to those opinions. Following the General Principles section, we will also address two further situations:

- A client and a third party who provided funds for representation of the client may dispute who is entitled to any remaining funds after the representation ends.
- Multiple clients who all contributed funds for a joint representation may dispute how to apportion among them funds remaining after the representation ends. [n.5]

General Principles

RPC 1.15A(g) governs situations in which a lawyer holds funds as a lawyer rather than in some other capacity: [n.6]

> If a lawyer possesses property in which two or more persons (one of which may be the lawyer) claim interests, the lawyer must maintain the property in trust until the dispute is resolved. The lawyer must promptly distribute all undisputed portions of the property. The lawyer must take reasonable action to resolve the dispute, including, when appropriate, interpleading the disputed funds.

If, for example, the lawyer has received $100 and has determined that the lawyer has no personal claim to the funds and that there are no claimants other than the lawyer's client who claims $70 and a third party who claims $40. The lawyer must distribute $60 to the client and $30 to the third party since there is no dispute as to these amounts while keeping only the disputed $10 in trust. [n.7] The extent of the lawyer's further obligations depends on the nature of the dispute, the amount in dispute, the availability of methods for alternative dispute resolution, and the likelihood of informal resolution. Washington Comment [9].

For example, as noted in part in Comment [4] to ABA Model Rule 1.15:

> [T]hird parties may have lawful claims against specific funds or other property in a lawyer's custody, such as a client's creditor who has a lien on funds recovered in a personal injury action. . . . A lawyer should not unilaterally assume to arbitrate a dispute between the client and the third party, but, when there are substantial grounds for dispute as to the person entitled to the funds, the lawyer may file an action to have a court resolve the dispute.

It is not possible in the abstract to lay out a set of rules which describe how the lawyer must or may act in all imaginable disputed funds situations. Nonetheless, the following guidelines should prove helpful in addressing many such situations:

If the lawyer has not already done so, the lawyer will need to inquire, at least preliminarily, about the alleged factual and legal basis of each claimant's position—for example, whether the claimant's position is based on a duly filed and protected medical lien or on representations allegedly made to the claimant either by the client or by the lawyer. Similarly, the lawyer will need to inquire, at least preliminarily, about each claimant's contentions regarding the claims by the other claimants.

If one of the claimants is a client of the lawyer, the lawyer must provide competent and diligent representation as required by RPC 1.1 and 1.3 and must communicate with the client about the representation as required by RPC 1.4, including an explanation of the potential effects of Rule 1.15A on what the lawyer may or may not do for the client. If, however, the lawyer and the client are both claimants, the lawyer should make clear to the client that the lawyer cannot represent the client because of their adverse interests in the dispute. [n.8]

The lawyer should make clear to claimants other than the lawyer's client that they are not the lawyer's clients and that they must look elsewhere for legal advice. [n.9] Unless there is some reason not to do so, the lawyer may ask the claimants whether they wish to try to resolve any differences by themselves, with or without the help of counsel. In suggesting this option, the lawyer may not make any misrepresentations of fact or law to any of the claimants about the strength or weakness of any claims.

If, following the lawyer's preliminary analysis or any further analysis that the lawyer may conduct, the lawyer concludes that more than one claimant has or may have a factually and legally nonfrivolous claim to the funds, the lawyer must not distribute any disputed portion of funds to any claimant. The lawyer must instead inform the claimants that if they cannot or choose not to resolve the dispute on their own, the lawyer will either continue to hold the funds in trust or will interplead them into court. [n.10]

The lawyer may also set a reasonable time limit on how long the lawyer may hold the funds before interpleading them. The lawyer may also inform the claimants that with their consent, the disputed funds may be transferred to another account, such as an interest-bearing account, pending resolution of the dispute. [n.11]

In assessing whether the claimants have nonfrivolous claims, the lawyer may consider that a decision by the lawyer to release disputed funds to one claimant will be subject to second-guessing in subsequent proceedings—whether by the client or by third parties. Nonetheless, the lawyer cannot ignore the obvious. If, for example, one claimant is the lawyer's client and the other is a third party with an unquestionably legally valid and enforceable statutory lien to which the client appears to have no response that is even potentially legally and factually cognizable, then the lawyer must honor the lien. If, on the other hand, the lawyer concludes that the lien is clearly invalid and that the third-party claimant is merely an unsecured creditor of the client to whom no commitments or promises about how the funds would be handled are alleged to have been made by or on behalf of the lawyer or the client, then the lawyer must give the funds to the client. If the lawyer is a claimant, the lawyer may also wish to consider the effects of the attorney lien

provisions in RCW 60.40.010 *et. seq*.

Two Additional Situations

We now turn to the two additional situations noted at the outset of this opinion:

1. *A client and a third party who provided funds for representation of the client may dispute who is entitled to any remaining funds after the representation ends.*

This situation could arise if, for example, one family member paid an advance deposit to a lawyer for representation of another family member and, after the representation ended, the two family members disputed who should receive any amount remaining in trust. The represented family member might assert that the entire amount was intended as a gift, and the paying family member might assert that the funds deposited with the lawyer were always intended and understood to be contingent on the need to pay for legal services with any excess to be refunded to the paying family member after the conclusion of the legal services.

A factual and legal analysis of this situation would at least require the lawyer to ask both family members why they believe they are entitled to the funds and whether they are aware of any documentation that addresses the issue. The lawyer might also decide to conduct additional research or consult with another lawyer, for example, about the law of gifting and trusts. Absent a clear and unchallenged written agreement or a clear rule of law in favor of one side or the other, a reasonably prudent lawyer may well conclude under the circumstances that the situation is one that involves conflicting nonfrivolous claims. [n.12]

Given the lawyer's duties of competent representation, diligence, and communication under RPC 1.1, 1.3, and 1.4, as well as the duty owed to nonclients like the nonclient family member supplying the funds, it is worth noting that this type of dispute is foreseeable in this kind of situation. If so, it might have been prudent for the lawyer to have considered discussing with the client the preparation of a written agreement to be signed by the client, and perhaps also the family member, regarding the distribution of any remaining funds. This would have allowed both parties to have a clear understanding of their rights and anticipate and resolve questions of the client and the family member about what would happen in the event of a dispute.

2. *Multiple clients who contributed funds for a joint representation may dispute who is entitled to receive what portion of any funds remaining after the representation ends.*

This situation could arise if several plaintiffs or defendants had agreed to pool their resources and share counsel. If funds are left in trust after the representation ends, the former co-clients may have different understandings of how the excess should be distributed.

The lawyer will again have to conduct at least some factual and legal research or consult another lawyer to determine whether the clients had ever reached agreement and whether

any of the clients have or may be able to make any nonfrivolous arguments that any agreement that may have been reached is not binding. However, because all the claimants here are the lawyer's clients, the lawyer's duty of competent representation suggests a responsibility to have encouraged the clients to agree in advance about how any extra funds would be distributed. If the lawyer does not do so, then the lawyer risks violating the duties of competent representation, diligence, and communication. The lawyer would also face recusal and a conflict of interest under RPC 1.7.

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Endnotes

1. WSBA Advisory Op. 2166 (2007); WSBA Adv. Op. 2213 (2011, amended 2012).

2. WSBA Advisory Op. 2188 (2008), citing WSBA Informal Op. 1313 (1989).

3. WSBA Advisory Op. 185 (1990, amended 2010).

4. WSBA Advisory Op. 2220 (2012).

5. This Advisory Opinion assumes that the lawyer is aware of the identity of all claimants and can contact them. If not, the lawyer must act consistently with Washington Comment [6] to RPC 1.15A. Please note, however, that this Advisory Opinion does not consider any different or additional obligations that might be imposed on a lawyer under RPC 1.8(g), the aggregate settlement rule.

6. Washington Comment [3] to RPC 1.15A provides that:

> This rule does not apply to property held by a lawyer acting solely in a fiduciary capacity such as attorney-in-fact, trustee, guardian, personal representative, executor, or administrator, or in any similar capacity where the lawyer's investment duties as a fiduciary are controlled by statute or other law. If a lawyer is acting as both a fiduciary and as the lawyer for the fiduciary, the character of the funds controls whether the funds should be deposited in a fiduciary account of the lawyer's trust account. In some cases, it may be permissible to put funds received in either the lawyer's trust account or the fiduciary account. That determination depends in part on the substantive law of fiduciary obligations, which is beyond the scope of these rules. The conflict of interest rules determine whether it is appropriate for a lawyer who is the fiduciary to also serve as the attorney for the fiduciary. See generally RPC 1.7; RPC 1.8(a) & cmt. 8; *In re Disciplinary Proceeding Against McKean*, 148 Wn.2d 849, 866 n.12, 64 P.3d 1226 (2003).

7. Continuing to hold the funds in the trust account after a dispute arises is compliant with RPC 1.15A(g), and the funds need not be further separated or transferred to another account:

> No funds belonging to the lawyer may be deposited or retained in a trust account except . . . funds belonging in part to a client or third person and in part presently or potentially to the lawyer must be deposited and retained in a trust

> account, but any portion belonging to the lawyer must be withdrawn at the earliest reasonable time. . . .

RPC 1.15A(h)(1)(ii); and see ABA Formal Op. 475 (2016) (discussing duty to safeguard fees subject to division with other counsel).

8. *See* RPC 1.7(a)(2); 1.7(b)(3).

9. *See* RPC 4.3; *Bohn v. Cody*, 119 Wash. 2d 357(1992).

10. For further information about interpleader actions, see Washington RCP 22, FRCP 22, and RCW 4.08.160. As noted in *Mack v. Kuckenmeister,* 619 F.3d 1010 (9th Cir. 2010), the stakeholder (in this instance, the lawyer who would file the interpleader), must identify the actual or potential claimants to the funds but is not required to resolve those claims. To the contrary, a party filing an interpleader action is asking the court to resolve those claims.

11. See Washington Comment [14] to RPC 1.15A ("If the client or third person requests that funds that would be deposited in a non-IOLTA trust account under paragraph (i)(2) instead be held in the IOLTA account, the lawyer should document this request in the lawyer's trust account records and preferably should confirm the request in writing to the client or third person.")

12. The lawyer might also be well advised to employ similar advance written clarification in one or more of the situations referenced in the prior Advisory Opinions cited at the beginning of this opinion.

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Advisory Opinions are provided for the education of the Bar and reflect the opinion of the Committee on Professional Ethics (CPE) or its predecessors. Advisory Opinions are provided pursuant to the authorization granted by the Board of Governors but are not individually approved by the Board and do not reflect the official position of the Bar association. Laws other than the Washington State Rules of Professional Conduct may apply to the inquiry. The Committee's answer does not include or opine about any other applicable law other than the meaning of the Rules of Professional Conduct.

WASHINGTON STATE
BAR ASSOCIATION

Financial Reports

(Unaudited)

Year to Date June 30, 2025

Prepared by
Maggie Yu, Controller

Submitted by
Tiffany Lynch, Director of Finance
July 21, 2025

WASHINGTON STATE BAR ASSOCIATION

To: Board of Governors
Budget and Audit Committee

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

Re: Key Financial Benchmarks for the Preliminary Fiscal Year to Date (YTD) through June 30, 2025, As % of Completion to Annual Budget

	% of Year	Current Year % YTD	Current Year $ Difference Favorable/(Unfavorable)	Prior Year YTD	Comments
Total Salaries & Benefits	**75%**	**74%**	**$134,830**	**74%**	**Favorable to budget due to higher capital labor and lower than budgeted FICA, L&I, and retirement.**
Other Indirect Expenses*	**75%**	**68%**	**$250,570**	**70%**	**Favorable to budget mainly due to timing of workplace benefits and lower than budgeted bank fees, HR, legal, and depreciation expenses.**
Total Indirect Expenses	**75%**	**73%**	**$385,400**	**74%**	**Favorable to budget resulting from other indirect expenses described above.**
General Fund Revenues	**75%**	**80%**	**$1,157,626**	**80%**	**Favorable to budget due to timing of donations and fee collection for bar exam, law clerks and Pro Hac Vice; higher revenue than budget for MCLE fees and interest income.**
General Fund Indirect Expenses	**75%**	**73%**	**$347,283**	**74%**	**Favorable to budget as described for indirect expenses above.**
General Fund Direct Expenses	**75%**	**59%**	**$527,609**	**58%**	**Favorable to budget due to timing of program activities and meetings/events.**
General Fund Net	**75%**	**156%**	**$2,032,518**	**125%**	**Favorable to budget for the reasons described above.**
CLE Revenue	**75%**	**73%**	**($26,354)**	**79%**	**Unfavorable to budget mainly due to lower than budgeted registrations.**
CLE Direct Expenses	**75%**	**40%**	**$126,353**	**42%**	**Favorable to budget due to timing of expenses for seminar activities and product sales.**
CLE Indirect Expenses	**75%**	**72%**	**$35,891**	**73%**	**Favorable to budget mainly due to other indirect savings as described above.**
CLE Net	**75%**	**29%**	**$135,890**	**250%**	**Favorable to budget primarily due to timing of direct expenses.**

*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 June 1, 2025 to June 30, 2025

Category	Actual Revenues	Reforcasted Revenues	Actual Indirect Expenses	Reforecasted Indirect Expenses	Actual Direct Expenses	Reforecasted Direct Expenses	Actual Total Expenses	Reforecasted Total Expenses	Actual Net Result	Reforecasted Net Result
Access to Justice	-	-	185,698	249,489	104,863	139,795	290,560	389,284	(290,560)	(389,284)
Admissions/Bar Exam	1,548,075	1,480,180	675,595	882,840	211,318	482,204	886,913	1,365,044	661,162	115,136
Advancement FTE		-	286,501	389,192	120	3,300	286,621	392,492	(286,621)	(392,492)
Bar News	436,892	589,600	238,046	329,917	273,808	400,175	511,853	730,092	(74,962)	(140,492)
Board of Governors	-	-	162,232	224,497	197,276	360,300	359,508	584,797	(359,508)	(584,797)
Character & Fitness Board	-	-	105,871	142,016	10,919	33,000	116,789	175,016	(116,789)	(175,016)
Communications Strategies	2,912	600	489,650	719,328	103,832	180,295	593,482	899,623	(590,570)	(899,023)
Communications Strategies FTE		-	192,980	250,494	-	-	192,980	250,494	(192,980)	(250,494)
Discipline	54,692	90,000	4,564,992	6,319,195	90,966	201,785	4,655,958	6,520,980	(4,601,267)	(6,430,980)
Diversity	135,000	135,000	264,948	375,891	12,230	70,900	277,177	446,791	(142,178)	(311,791)
Finance	639,581	600,000	881,881	1,160,064	3,080	4,920	884,961	1,164,984	(245,379)	(564,984)
Foundation	-	-	123,377	167,282	5,858	17,800	129,235	185,082	(129,235)	(185,082)
Human Resources	-	-	585,401	613,706	-	-	585,401	613,706	(585,401)	(613,706)
Law Clerk Program	249,226	237,200	135,127	182,789	6,895	51,031	142,022	233,820	107,204	3,380
Legislative	-	-	190,618	256,817	21,888	26,275	212,506	283,092	(212,506)	(283,092)
Legal Lunchbox	32,863	34,000	39,408	34,829	4,414	4,725	43,822	39,554	(10,959)	(5,554)
Licensing and Membership Records	397,238	482,200	587,448	797,383	23,373	28,380	610,821	825,763	(213,582)	(343,563)
Licensing Fees	13,073,535	17,492,616	-	-	-	-	0	-	13,073,535	17,492,616
Limited License Legal Technician	18,036	25,031	67,244	87,751	2,616	12,500	69,860	100,251	(51,825)	(75,220)
Limited Practice Officers	137,990	189,300	77,057	105,161	16,161	37,304	93,218	142,465	44,773	46,835
Mandatory CLE	1,167,225	1,233,800	491,528	658,390	110,414	151,333	601,942	809,723	565,283	424,077
Member Wellness Program	1,500	10,000	170,425	229,939	2,599	11,905	173,024	241,844	(171,524)	(231,844)
Member Services & Engagement	14,230	16,300	198,471	295,449	73,717	118,900	272,189	414,349	(257,959)	(398,049)
Mini CLE	-	-	89,413	120,867	-	-	89,413	120,867	(89,413)	(120,867)
New Member Education	148,041	178,000	79,584	108,113	1,287	2,600	80,872	110,713	67,169	67,287
Office of General Counsel	270	-	762,308	1,050,467	5,909	26,805	768,217	1,077,272	(767,947)	(1,077,272)
Office of the Executive Director	-	-	657,555	890,399	127,862	138,975	785,417	1,029,374	(785,417)	(1,029,374)
OGC-Disciplinary Board	-	-	150,474	199,971	87,819	128,500	238,293	328,471	(238,293)	(328,471)
Practice of Law Board	-	-	52,154	70,566	740	16,000	52,894	86,566	(52,894)	(86,566)
Practice Management Assistance	50,770	62,000	105,633	143,410	90,586	93,650	196,219	237,060	(145,449)	(175,060)
Professional Responsibility Program	-	-	156,352	210,019	3,322	7,700	159,674	217,719	(159,674)	(217,719)
Public Service Programs	134,832	135,280	165,478	226,074	240,390	310,700	405,868	536,774	(271,036)	(401,494)
Publication and Design Services	-	-	97,346	125,539	4,844	5,000	102,190	130,539	(102,190)	(130,539)
Regulatory Services FTE			328,821	440,534	1,706	9,490	330,527	450,024	(330,527)	(450,024)
Regulatory Reform	-	-	152,677	236,405	12,409	82,500	165,086	318,905	(165,086)	(318,905)
Sections Administration	364,299	275,000	216,287	300,658	209	2,400	216,496	303,058	147,803	(28,058)
Service Center	-	-	537,959	734,738	1,705	3,053	539,664	737,791	(539,664)	(737,791)
Volunteer Engagement	-	-	148,558	208,173	18,205	37,066	166,763	245,239.42	(166,763)	(245,239)
Technology	-	-	1,446,974	2,074,118	-	-	1,446,974	2,074,118	(1,446,974)	(2,074,118)
Subtotal General Fund	**18,607,206**	23,266,107	**15,862,070**	**21,612,469**	**1,873,341**	3,201,266	**17,735,410**	24,813,735	**871,795**	**(1,547,628)**
Expenses using Facilities Reserve funds			(164,222)				(164,222)	(169,206)	164,222	169,206
Expenses using Special Project Reserve funds			(152,677)		(12,409)		(165,086)	(318,905)	165,086	318,905
Total General Fund - Net Result from Operations	**18,607,206**		**15,545,170**		**1,860,931**		**17,406,101**	**24,325,624**	**1,201,104**	**(1,059,517)**
Percentage of Budget	**80%**		**73%**		**59%**		**71%**			
CLE-Seminars and Products	1,096,659	1,443,710	754,142	1,063,549	143,958	307,112	898,100	1,370,661	198,559	73,049
CLE - Deskbooks	58,021	131,000	217,288	279,545	1,236	54,950	218,524	334,495	(160,503)	(203,495)
Total CLE	1,154,679	1,574,710	971,430	1,343,094	145,194	362,062	1,116,624	1,705,156	38,055	(130,446)
Percentage of Budget	**73%**		**72%**		**40%**		**65%**	(11,269)	9,502	11,269
Expenses using Facilities Reserve funds			(9,502)				(9,502)	**1,693,887**	**47,557**	**(119,177)**
Total CLE Fund - Net Result from Operations			**961,928**				**1,107,122**			
Total All Sections	604,091	645,483	-	-	612,395	1,040,206	612,395	1,040,206	(8,304)	(394,722)
Client Protection Fund-Restricted	900,952	930,540	136,363	184,787	(83,130)	506,400	53,233	691,187	847,719	239,353
Expenses using Facilities Reserve funds			(1,461)				(1,461)	(1,518)	1,461	1,518
Total CPF Fund - Net Result from Operations			**134,902**				**51,772**	**689,669**	**849,180**	**240,871**
Totals	**21,266,928**	**26,416,840**	**16,969,862**	**23,140,350**	**2,547,800**	**5,109,934**	**19,517,662**	**28,250,284**	**1,749,266**	**(1,833,444)**
Totals Net of Use of Facilities Reserve Funds			(175,185)				(175,185)	**27,749,386**	175,185	**(1,332,546)**
Totals Net of Use of Special Project Reserve Funds			(152,677)		(12,409)		(165,086)		165,086	
			16,642,001		**2,535,390**		**19,177,391**		**2,089,537**	
Percentage of Budget	**81%**		**73%**		**50%**		**69%**			

Summary of Fund Balances:	Fund Balances Sept. 30, 2024	2025 Reforecasted Fund Balances	Fund Balances Year to date
Restricted Funds:			
Client Protection Fund	4,759,353	4,998,705	5,608,532
Board-Designated Funds (Non-General Fund):			
CLE Fund Balance	1,344,457	1,214,012	1,392,014
Section Funds	2,123,665	1,728,943	2,115,361
Board-Designated Funds (General Fund):			
Operating Reserve Fund	2,500,000	2,500,000	2,500,000
Facilities Reserve Fund	207,286	-	7,847
Special Projects and Innovation Fund	400,000	81,095	234,914
Unrestricted Funds (General Fund):			
Unrestricted General Fund	7,019,063	5,997,626	8,244,422
Total General Fund Balance	**10,126,350**	**8,578,721**	**10,987,183**
Net Change in Total General Fund Balance		**(1,547,628)**	**871,795**
Total Fund Balance	**18,353,825**	**16,520,381**	**20,103,090**
Net Change In Fund Balance		**(1,833,444)**	**1,749,266**

Washington State Bar Association
Analysis of Cash Investments
As of June 30, 2025

Checking & Savings Accounts

General Fund

Checking

Bank	Account	Amount
Wells Fargo	General	948,936
	Total	

Investments	Rate (yield)	Amount
Wells Fargo Money Market	4.22%	11,925,359
UBS Financial Money Market	4.22%	1,172,056
CDs/Treasuries	see list	9,243,129
	General Fund Total	**23,289,480**

Client Protection Fund

Checking

Bank	Amount
Wells Fargo	385,371

Investments	Rate (yield)	Amount
Wells Fargo Money Market	4.22%	2,447,818
CDs/Treasuries	see list	2,971,171
	Client Protection Fund Total	**5,804,360**
	Grand Total Cash & Investments	**29,093,840**

Washington State Bar Association
Analysis of Cash Investments
As of June 30, 2025

General Fund

Bank	Yield	Term Months	Trade Date	Settle Date	Maturity Date	Amount
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
State Bank India CD	4.25%	9	3/17/2025	3/24/2025	12/19/2025	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
Zions Bancorp NA CD	4.15%	9	3/28/2025	4/2/2025	1/2/2026	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
Preferred bank La Calif	4.30%	9	5/28/2025	5/30/2025	2/27/2026	250,000
Southeast bank	4.25%	9	5/28/2025	5/30/2025	2/27/2026	250,000
Norway savings bank	4.25%	9	5/28/2025	6/2/2025	3/2/2026	250,000
Old national bank	4.25%	9	5/28/2025	5/29/2025	3/2/2026	250,000
Wells Fargo CD	4.25%	12	2/24/2025	3/5/2025	3/5/2026	250,000
Fortis Bankus CD	4.25%	12	3/28/2025	4/11/2025	4/10/2026	250,000
Southstate bank NA	4.40%	10	6/12/2025	6/18/2025	4/20/2026	250,000
Israel Discount BK of NY CD	4.00%	12	4/22/2025	4/28/2025	4/28/2026	250,000
Bank of Baroda CD	4.35%	12	6/12/2025	6/17/2025	6/17/2026	250,000
Merrick Bank CD	4.30%	12	6/12/2025	6/20/2025	6/18/2026	250,000
Simmons Bank/Pine Bluff CD	4.20%	12	6/12/2025	6/20/2025	6/18/2026	250,000
US T- Bill's						
US Treasury Bill	4.12%	6	12/31/2024	1/2/2025	7/3/2025	244,967
US Treasury Bill	4.15%	4	4/22/2025	4/23/2025	8/19/2025	493,379
US Treasury Bill	4.22%	6	2/21/2025	2/24/2025	8/31/2025	514,177
US Treasury Bill	4.30%	11	11/26/2024	11/27/2024	10/30/2025	240,364
					Total	**9,243,129**

Washington State Bar Association
Analysis of Cash Investments
As of June 30, 2025

Client Fund Protection Fund

Bank	Yield	Term Months	Trade Date	Settle Date	Maturity Date	Amount
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
Mizuho Bank USA	4.20%	9	3/17/2025	3/26/2025	12/26/2025	250,000
Bank of American NA CD	4.35%	12	1/16/2025	1/24/2025	1/23/2026	250,000
Bank of China/NY	4.25%	9	5/28/2025	5/30/2025	2/27/2026	250,000
Commerce Bank Geneva MN CD	4.30%	9	6/12/2025	6/18/2025	3/18/2026	250,000
US T- Bill's						
US Treasury Bill	4.12%	4	4/7/2025	4/8/2025	8/5/2025	246,686
US Treasury Bill	4.00%	4	4/22/2025	4/23/2025	8/19/2025	493,379
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	**2,971,171**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LICENSE FEES						
REVENUE:						
LICENSE FEES	17,492,616	1,407,088	13,073,535	4,419,081	75%	(45,927)
TOTAL REVENUE:	**17,492,616**	**1,407,088**	**13,073,535**	**4,419,081**	**75%**	**(45,927)**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

ADMISSIONS

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
EXAM SOFTWARE REVENUE	27,500	-	8,150	19,350	30%	(12,475)
BAR EXAM FEES	1,378,980	70,210	1,482,495	(103,515)	108%	448,260
RULE 9/LEGAL INTERN FEES	12,500	2,150	14,100	(1,600)	113%	4,725
SPECIAL ADMISSIONS	61,200	7,410	43,330	17,870	71%	(2,570)
TOTAL REVENUE:	**1,480,180**	**79,770**	**1,548,075**	**(67,895)**	**105%**	**437,940**
DIRECT EXPENSES:						
POSTAGE	2,000	158	2,394	(394)	120%	(894)
STAFF TRAVEL/PARKING	24,000	-	8,264	15,736	34%	9,736
STAFF MEMBERSHIP DUES	495	-	245	250	49%	126
SUPPLIES	4,000	868	3,978	22	99%	(978)
FACILITY, PARKING, FOOD	100,000	64	43,147	56,853	43%	31,853
EXAMINER FEES	44,500	-	21,750	22,750	49%	11,625
UBE EXMINATIONS	118,000	-	41,448	76,552	35%	47,052
BOARD OF BAR EXAMINERS	42,500	-	7,511	34,989	18%	24,364
BAR EXAM PROCTORS	23,000	-	9,432	13,568	41%	7,818
DISABILITY ACCOMMODATIONS	65,000	2,575	31,509	33,491	48%	17,241
CHARACTER & FITNESS INVESTIGATIONS	1,000	-	700	300	70%	50
LAW SCHOOL VISITS	2,000	-	21	1,979	1%	1,479
SOFTWARE HOSTING	45,609	3,951	33,879	11,730	74%	328
STAFF CONFERENCE & TRAINING	10,100	-	7,040	3,060	70%	535
TOTAL DIRECT EXPENSES:	**482,204**	**7,616**	**211,318**	**270,886**	**44%**	**150,335**
INDIRECT EXPENSES:						
SALARY EXPENSE (6.17 FTE)	531,757	44,704	418,985	112,772	79%	(20,168)
BENEFITS EXPENSE	187,665	15,440	142,285	45,380	76%	(1,536)
OTHER INDIRECT EXPENSE	163,419	8,589	114,324	49,094	70%	8,240
TOTAL INDIRECT EXPENSES:	**882,840**	**68,733**	**675,595**	**207,246**	**77%**	**(13,464)**
TOTAL ALL EXPENSES:	**1,365,044**	**76,349**	**886,913**	**478,132**	**65%**	**136,871**
NET INCOME (LOSS):	**115,136**	**3,421**	**661,162**	**(546,027)**	**574%**	**574,811**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

ADVANCEMENT FTE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF CONFERENCE & TRAINING	3,300	-	120	3,180	4%	2,355
TOTAL DIRECT EXPENSES:	**3,300**	**-**	**120**	**3,180**	**4%**	**2,355**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.96 FTE)	264,525	23,237	197,329	67,196	75%	1,065
BENEFITS EXPENSE	74,703	6,329	54,998	19,705	74%	1,029
OTHER INDIRECT EXPENSE	49,964	2,733	34,174	15,790	68%	3,299
TOTAL INDIRECT EXPENSES:	**389,192**	**32,300**	**286,501**	**102,691**	**74%**	**5,393**
TOTAL ALL EXPENSES:	**392,492**	**32,300**	**286,621**	**105,871**	**73%**	**7,748**
NET INCOME (LOSS):	**(392,492)**	**(32,300)**	**(286,621)**	**(105,871)**	**73%**	**7,748**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ACCESS TO JUSTICE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
ATJ BOARD RETREAT	6,000	63	5,181	820	86%	(681)
LEADERSHIP TRAINING	6,000	346	7,576	(1,576)	126%	(3,076)
ATJ BOARD EXPENSE	58,500	4,798	47,318	11,182	81%	(3,443)
STAFF TRAVEL/PARKING	2,800	10	1,352	1,448	48%	748
STAFF CONFERENCE & TRAINING	2,495	40	1,570	925	63%	301
PUBLIC DEFENSE	4,000	-	2,279	1,721	57%	721
CONFERENCE/INSTITUTE EXPENSE	30,000	(216)	22,699	7,301	76%	(199)
RECEPTION/FORUM EXPENSE	30,000	(427)	16,887	13,113	56%	5,613
TOTAL DIRECT EXPENSES:	**139,795**	**4,614**	**104,863**	**34,932**	**75%**	**(16)**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.63 FTE)	155,733	12,303	118,231	37,502	76%	(1,431)
BENEFITS EXPENSE	51,565	4,322	38,420	13,144	75%	253
OTHER INDIRECT EXPENSE	42,191	2,281	29,046	13,144	69%	2,597
TOTAL INDIRECT EXPENSES:	**249,489**	**18,906**	**185,698**	**63,791**	**74%**	**1,419**
TOTAL ALL EXPENSES:	**389,284**	**23,520**	**290,560**	**98,723**	**75%**	**1,402**
NET INCOME (LOSS):	**(389,284)**	**(23,520)**	**(290,560)**	**(98,723)**	**75%**	**1,402**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
BAR NEWS						
REVENUE:						
ROYALTIES	2,000	-	-	2,000	0%	(1,500)
DISPLAY ADVERTISING	405,000	49,963	355,642	49,358	88%	51,892
SUBSCRIPT/SINGLE ISSUES	100	-	108	(8)	108%	33
CLASSIFIED ADVERTISING	2,500	565	3,437	(937)	137%	1,562
JOB TARGET ADVERSTISING	180,000	14,588	77,705	102,295	43%	(57,295)
TOTAL REVENUE:	**589,600**	**65,116**	**436,892**	**152,708**	**74%**	**(5,308)**
DIRECT EXPENSES:						
POSTAGE	135,000	15,191	106,313	28,687	79%	(5,063)
PRINTING, COPYING & MAILING **	261,500	25,787	166,313	95,187	64%	29,812
DIGITAL/ONLINE DEVELOPMENT	2,000	-	903	1,097	45%	597
GRAPHICS/ARTWORK	1,000	-	75	925	8%	675
EDITORIAL ADVISORY COMMITTEE	300	-	-	300	0%	225
STAFF MEMBERSHIP DUES	150	-	-	150	0%	113
SUBSCRIPTIONS	225	-	204	21	91%	(36)
TOTAL DIRECT EXPENSES:	**400,175**	**40,979**	**273,808**	**126,367**	**68%**	**26,324**
INDIRECT EXPENSES:						
SALARY EXPENSE (2.13 FTE)	207,867	15,484	152,847	55,020	74%	3,053
BENEFITS EXPENSE	67,753	5,395	48,198	19,555	71%	2,616
OTHER INDIRECT EXPENSE	54,297	2,959	37,000	17,297	68%	3,723
TOTAL INDIRECT EXPENSES:	**329,917**	**23,837**	**238,046**	**91,872**	**72%**	**9,392**
TOTAL ALL EXPENSES:	**730,092**	**64,816**	**511,853**	**218,239**	**70%**	**35,716**
NET INCOME (LOSS):	**(140,492)**	**301**	**(74,962)**	**(65,531)**	**53%**	**30,407**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
BOARD OF GOVERNORS						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
BOG MEETINGS	148,000	698	90,436	57,564	61%	20,564
BOG COMMITTEES' EXPENSES **	8,500	577	4,750	3,750	56%	1,625
BOG RETREAT **	43,000	-	38,128	4,872	89%	(5,878)
BOG CONFERENCE ATTENDANCE **	36,500	-	31,162	5,338	85%	(3,787)
BOG TRAVEL & OUTREACH	50,000	1,130	16,241	33,759	32%	21,259
LEADERSHIP TRAINING	15,000	-	-	15,000	0%	11,250
BOG ELECTIONS	42,000	2,255	16,298	25,703	39%	15,203
PRESIDENT'S DINNER	10,000	-	0	10,000	0%	7,500
NEW GOVERNOR ORIENTATION **	3,500	-	177	3,323	5%	2,448
PRESIDENT'S PHOTO	3,300	-	-	3,300	0%	2,475
SUPPLIES	500	-	84	416	17%	291
TOTAL DIRECT EXPENSES:	**360,300**	**4,659**	**197,276**	**163,024**	**55%**	**72,949**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.73 FTE) **	132,168	10,851	96,845	35,324	73%	2,281
BENEFITS EXPENSE **	48,740	4,129	35,310	13,430	72%	1,245
OTHER INDIRECT EXPENSE **	43,589	2,404	30,078	13,512	69%	2,614
TOTAL INDIRECT EXPENSES:	**224,497**	**17,384**	**162,232**	**62,265**	**72%**	**6,141**
TOTAL ALL EXPENSES:	**584,797**	**22,043**	**359,508**	**225,289**	**61%**	**79,090**
NET INCOME (LOSS):	**(584,797)**	**(22,043)**	**(359,508)**	**(225,289)**	**61%**	**79,090**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CHARACTER & FITNESS BOARD						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CHARACTER & FITNESS BOARD EXP	18,000	953	6,171	11,829	34%	7,329
COURT REPORTERS	15,000	-	4,748	10,252	32%	6,502
TOTAL DIRECT EXPENSES:	**33,000**	**952.52**	**10,919**	**22,081**	**33%**	**13,831**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.75 FTE)	95,315	8,047	72,185	23,130	76%	(699)
BENEFITS EXPENSE	27,582	2,351	20,581	7,001	75%	106
OTHER INDIRECT EXPENSE	19,119	1,048	13,104	6,015	69%	1,235
TOTAL INDIRECT EXPENSES:	**142,016**	**11,446**	**105,871**	**36,145**	**75%**	**641**
TOTAL ALL EXPENSES:	**175,016**	**12,399**	**116,789**	**58,227**	**67%**	**14,473**
NET INCOME (LOSS):	**(175,016)**	**(12,399)**	**(116,789)**	**(58,227)**	**67%**	**14,473**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CONTINUING LEGAL EDUCATION (CLE)						
(CLES - CLEP)						
REVENUE:						
SEMINAR REGISTRATIONS	725,000	7,937	387,096	337,904	53%	(156,654)
SEMINAR REVENUE-OTHER	20,000	1,500	16,100	3,900	81%	1,100
SEMINAR SPLITS W/ CLE	(150,000)	-	-	(150,000)	0%	112,500
SHIPPING & HANDLING	210	9	99	111	47%	(59)
COURSEBOOK SALES	3,500	95	745	2,755	21%	(1,880)
MP3 AND VIDEO SALES	845,000	19,138	692,619	152,381	82%	58,869
TOTAL REVENUE:	**1,443,710**	**28,679**	**1,096,659**	**347,051**	**76%**	**(43,054)**
DIRECT EXPENSES:						
COURSEBOOK PRODUCTION	500	-	-	500	0%	375
DEPRECIATION	2,012	170	1,530	482	76%	(21)
ONLINE EXPENSES	54,000	2,030	28,166	25,834	52%	12,334
ACCREDITATION FEES	3,000	(60)	1,920	1,080	64%	330
FACILITIES	165,000	400	94,157	70,843	57%	29,593
DISABILITY ACCOMMODATIONS	7,000	-	-	7,000	0%	5,250
SPEAKERS & PROGRAM DEVELOP	48,000	9,286	15,334	32,666	32%	20,666
HONORARIA	3,000	-	-	3,000	0%	2,250
CLE SEMINAR COMMITTEE	200	-	-	200	0%	150
STAFF TRAVEL/PARKING	15,000	1,368	2,734	12,266	18%	8,516
STAFF CONFERENCE & TRAINING	6,900	-	-	6,900	0%	5,175
STAFF MEMBERSHIP DUES	1,500	-	-	1,500	0%	1,125
SUPPLIES	500	-	-	500	0%	375
COST OF SALES - COURSEBOOKS	300	10	58	242	19%	167
POSTAGE & DELIVERY-COURSEBOOKS	200	6	59	141	30%	91
TOTAL DIRECT EXPENSES:	**307,112**	**13,210**	**143,958**	**163,154**	**47%**	**86,376**
INDIRECT EXPENSES:						
SALARY EXPENSE (8.00 FTE)	630,924	51,060	450,964	179,960	71%	22,229
BENEFITS EXPENSE	228,691	19,140	163,914	64,777	72%	7,604
OTHER INDIRECT EXPENSE	203,934	11,137	139,264	64,670	68%	13,686
TOTAL INDIRECT EXPENSES:	**1,063,549**	**81,337**	**754,142**	**309,407**	**71%**	**43,520**
TOTAL ALL EXPENSES:	**1,370,661**	**94,547**	**898,100**	**472,561**	**66%**	**129,896**
NET INCOME (LOSS):	**73,049**	**(65,868)**	**198,559**	**(125,509)**	**272%**	**143,772**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CLIENT PROTECTION FUND						
REVENUE:						
CPF RESTITUTION	10,000	465	19,277	(9,277)	193%	11,777
CPF MEMBER ASSESSMENTS	720,540	3,760	715,600	4,940	99%	175,195
INTEREST INCOME	200,000	19,512	166,075	33,925	83%	16,075
TOTAL REVENUE:	**930,540**	**23,737**	**900,952**	**29,588**	**97%**	**203,047**
DIRECT EXPENSES:						
BANK FEES	2,500	(167)	(3,002)	5,502	-120%	4,877
GIFTS TO INJURED CLIENTS	500,000	-	(80,480)	580,480	-16%	455,480
CPF BOARD EXPENSES	2,000	-	353	1,647	18%	1,147
STAFF CONFERENCE & TRAINING	1,700	-	-	1,700	0%	1,275
STAFF MEMBERSHIP DUES	200	-	-	200	0%	150
TOTAL DIRECT EXPENSES:	**506,400**	**(167)**	**(83,130)**	**589,530**	**-16%**	**462,930**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.23 FTE)	115,160	9,284	86,800	28,361	75%	(429)
BENEFITS EXPENSE	38,272	3,242	28,237	10,035	74%	467
OTHER INDIRECT EXPENSE	31,355	1,706	21,326	10,028	68%	2,190
TOTAL INDIRECT EXPENSES:	**184,787**	**14,231**	**136,363**	**48,424**	**74%**	**2,228**
TOTAL ALL EXPENSES:	**691,187**	**14,064**	**53,233**	**637,954**	**8%**	**465,157**
NET INCOME (LOSS):	**239,353**	**9,673**	**847,719**	**(608,366)**	**354%**	**668,204**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
COMMUNICATION STRATEGIES						
REVENUE:						
50 YEAR MEMBER TRIBUTE LUNCH	100	493	873	(773)	873%	798
WSBA LOGO MERCHANDISE SALES	500	577	2,039	(1,539)	408%	1,664
TOTAL REVENUE:	**600**	**1,070**	**2,912**	**(2,312)**	**485%**	**2,462**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	5,895	198	1,705	4,190	29%	2,716
STAFF MEMBERSHIP DUES	1,800	440	767	1,033	43%	583
SUBSCRIPTIONS	4,000	108	1,546	2,454	39%	1,454
APEX	52,500	22,582	22,637	29,863	43%	16,738
BAR LEADERS SUMMIT	35,000	-	33,963	1,037	97%	(7,713)
50 YEAR MEMBER TRIBUTE LUNCH	35,000	20,401	27,984	7,016	80%	(1,734)
BAR OUTREACH	20,000	1,047	3,455	16,545	17%	11,545
COMMUNICATIONS OUTREACH	15,000	538	3,014	11,986	20%	8,236
STAFF CONFERENCE & TRAINING	11,100	-	8,761	2,339	79%	(436)
TOTAL DIRECT EXPENSES:	**180,295**	**45,314**	**103,832**	**76,463**	**58%**	**31,390**
INDIRECT EXPENSES:						
SALARY EXPENSE (5.39 FTE) **	426,569	36,013	287,894	138,675	67%	32,033
BENEFITS EXPENSE **	154,335	12,847	107,876	46,459	70%	7,876
OTHER INDIRECT EXPENSE **	138,424	7,500	93,881	44,543	68%	9,937
TOTAL INDIRECT EXPENSES:	**719,328**	**56,360**	**489,650**	**229,677**	**68%**	**49,845**
TOTAL ALL EXPENSES:	**899,623**	**101,674**	**593,482**	**306,141**	**66%**	**81,235**
NET INCOME (LOSS):	**(899,023)**	**(100,604)**	**(590,570)**	**(308,453)**	**66%**	**83,697**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

COMMUNICATION STRATEGIES FTE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
INDIRECT EXPENSES:						
SALARY EXPENSE (1.00 FTE)	179,737	15,926	140,340	39,397	78%	(5,537)
BENEFITS EXPENSE	45,265	3,887	35,168	10,097	78%	(1,219)
OTHER INDIRECT EXPENSE	25,492	1,397	17,472	8,019	69%	1,647
TOTAL INDIRECT EXPENSES:	**250,494**	**21,210**	**192,980**	**57,513**	**77%**	**(5,110)**
NET INCOME (LOSS):	**(250,494)**	**(21,210)**	**(192,980)**	**(57,513)**	**77%**	**(5,110)**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DESKBOOKS						
REVENUE:						
DESKBOOK SALES	30,000	629	8,124	21,876	27%	(14,376)
LEXIS/NEXIS ROYALTIES	75,000	-	32,457	42,543	43%	(23,793)
SECTION PUBLICATION SALES	1,000	-	90	910	9%	(660)
FASTCASE ROYALTIES	25,000	-	17,350	7,651	69%	(1,401)
TOTAL REVENUE:	**131,000**	**629**	**58,021**	**72,979**	**44%**	**(40,229)**
DIRECT EXPENSES:						
COST OF SALES - DESKBOOKS	5,000	-	1,162	3,838	23%	2,588
COST OF SALES - SECTION PUBLICATION	500	-	74	426	15%	301
SPLITS TO SECTIONS	300	-	-	300	0%	225
DESKBOOK ROYALTIES	300	-	-	300	0%	225
POSTAGE & DELIVER-DESKBOOKS	300	-	-	300	0%	225
OBSOLETE INVENTORY	48,250	-	-	48,250	0%	36,188
STAFF MEMBERSHIP DUES	250	-	-	250	0%	188
SUBSCRIPTIONS	50	-	-	50	0%	38
TOTAL DIRECT EXPENSES:	**54,950**	**-**	**1,236**	**53,714**	**2%**	**39,977**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.75 FTE)	178,087	11,640	145,719	32,369	82%	(12,153)
BENEFITS EXPENSE	56,847	4,289	40,993	15,854	72%	1,643
OTHER INDIRECT EXPENSE	44,611	2,445	30,577	14,034	69%	2,881
TOTAL INDIRECT EXPENSES:	**279,545**	**18,375**	**217,288**	**62,257**	**78%**	**(7,629)**
TOTAL ALL EXPENSES:	**334,495**	**18,375**	**218,524**	**115,971**	**65%**	**32,348**
NET INCOME (LOSS):	**(203,495)**	**(17,746)**	**(160,503)**	**(42,992)**	**79%**	**(7,882)**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DISCIPLINE						
REVENUE:						
AUDIT REVENUE	1,000	85	553	448	55%	(198)
RECOVERY OF DISCIPLINE COSTS	70,000	2,530	38,211	31,789	55%	(14,289)
DISCIPLINE HISTORY SUMMARY	19,000	1,588	15,928	3,072	84%	1,678
TOTAL REVENUE:	**90,000**	**4,203**	**54,692**	**35,308**	**61%**	**(12,808)**
DIRECT EXPENSES:						
PUBLICATIONS PRODUCTION	350	-	-	350	0%	263
STAFF TRAVEL/PARKING	25,000	1,070	7,887	17,113	32%	10,863
STAFF MEMBERSHIP DUES	7,090	-	6,840	250	96%	(1,523)
TELEPHONE	4,000	196	1,704	2,296	43%	1,296
COURT REPORTERS	60,000	6,496	32,357	27,643	54%	12,643
OUTSIDE COUNSEL/AIC	1,000	-	-	1,000	0%	750
LITIGATION EXPENSES	40,000	480	8,282	31,718	21%	21,718
DISABILITY EXPENSES	15,000	3,264	7,763	7,237	52%	3,487
TRANSLATION SERVICES	12,000	890	3,795	8,205	32%	5,205
STAFF CONFERENCE & TRAINING	37,345	2,607	22,338	15,007	60%	5,671
TOTAL DIRECT EXPENSES:	**201,785**	**15,003**	**90,966**	**110,819**	**45%**	**60,373**
INDIRECT EXPENSES:						
SALARY EXPENSE (38.90 FTE)	4,053,832	330,111	2,958,528	1,095,304	73%	81,846
BENEFITS EXPENSE	1,272,455	105,907	927,673	344,782	73%	26,669
OTHER INDIRECT EXPENSE	992,908	54,186	678,791	314,116	68%	65,889
TOTAL INDIRECT EXPENSES:	**6,319,195**	**490,204**	**4,564,992**	**1,754,203**	**72%**	**174,404**
TOTAL ALL EXPENSES:	**6,520,980**	**505,207**	**4,655,958**	**1,865,022**	**71%**	**234,777**
NET INCOME (LOSS):	**(6,430,980)**	**(501,004)**	**(4,601,267)**	**(1,829,713)**	**72%**	**221,968**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DIVERSITY						
REVENUE:						
DONATIONS	135,000	-	135,000	0	100%	33,750
TOTAL REVENUE:	**135,000**	**-**	**135,000**	**0**	**100%**	**33,750**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,700	282	736	2,964	20%	2,039
STAFF MEMBERSHIP DUES	700	-	655	45	94%	(130)
DEI COUNCIL	5,900	1,132	1,924	3,976	33%	2,501
DIVERSITY EVENTS & PROJECTS	43,100	650	8,708	34,392	20%	23,617
INTERNAL DIVERSITY OUTREACH	7,500	-	-	7,500	0%	5,625
STAFF CONFERENCE & TRAINING	3,000	-	162	2,838	5%	2,088
CONSULTING SERVICES	7,000	-	45	6,955	1%	5,205
TOTAL DIRECT EXPENSE:	**70,900**	**2,064**	**12,230**	**58,670**	**17%**	**40,945**
INDIRECT EXPENSES:						
SALARY EXPENSE (2.69 FTE)	227,749	13,637	161,271	66,478	71%	9,541
BENEFITS EXPENSE	79,569	5,940	56,913	22,656	72%	2,764
OTHER INDIRECT EXPENSE	68,573	3,740	46,764	21,809	68%	4,666
TOTAL INDIRECT EXPENSES:	**375,891**	**23,316**	**264,948**	**110,943**	**70%**	**16,970**
TOTAL ALL EXPENSES:	**446,791**	**25,380**	**277,177**	**169,613**	**62%**	**57,916**
NET INCOME (LOSS):	**(311,791)**	**(25,380)**	**(142,178)**	**(169,613)**	**46%**	**91,665**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ETHICS, WELLNESS, & PRACTICE						
(MWP-PMA-PRP)						
REVENUE:						
DIVERSIONS	10,000	-	1,500	8,500	15%	(6,000)
ROYALTIES	62,000	200	50,770	11,230	82%	4,270
TOTAL REVENUE:	**72,000**	**200**	**52,270**	**19,730**	**73%**	**(1,730)**
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	1,450	-	1,053	397	73%	34
MEMBER WELLNESS COUNCIL	4,250	-	1,042	3,208	25%	2,146
LEGAL TECH TASK FORCE	5,000	-	2,750	2,250	55%	1,000
STAFF TRAVEL/PARKING	6,000	-	1,069	4,931	18%	3,431
STAFF CONFERENCE & TRAINING	9,100	126	4,746	4,354	52%	2,079
SUBSCRIPTIONS	1,455	110	993	462	68%	98
CPE COMMITTEE	1,000	-	286	714	29%	464
FASTCASE	85,000	-	84,568	432	99%	(20,818)
TOTAL DIRECT EXPENSES:	**113,255**	**236**	**96,507**	**16,748**	**85%**	**(11,566)**
INDIRECT EXPENSES:						
SALARY EXPENSE (3.51 FTE)	376,056	31,838	284,688	91,369	76%	(2,645)
BENEFITS EXPENSE	117,836	9,938	86,826	31,010	74%	1,551
OTHER INDIRECT EXPENSE	89,476	4,870	60,896	28,580	68%	6,211
TOTAL INDIRECT EXPENSES:	**583,369**	**46,645**	**432,410**	**150,959**	**74%**	**5,117**
TOTAL ALL EXPENSES:	**696,624**	**46,882**	**528,917**	**167,707**	**76%**	**(6,449)**
NET INCOME (LOSS):	**(624,624)**	**(46,682)**	**(476,647)**	**(147,976)**	**76%**	**(8,179)**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

FINANCE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
INTEREST INCOME	600,000	90,512	639,581	(39,581)	107%	189,581
TOTAL REVENUE:	**600,000**	**90,512**	**639,581**	**(39,581)**	**107%**	**189,581**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,750	(314)	2,776	974	74%	36
STAFF CONFERENCE & TRAINING	500	-	303	197	61%	72
STAFF MEMBERSHIP DUES	670	-	-	670	0%	503
TOTAL DIRECT EXPENSES:	**4,920**	**(314)**	**3,080**	**1,840**	**63%**	**610**
INDIRECT EXPENSES:						
SALARY EXPENSE (6.92 FTE)	751,265	62,616	586,536	164,728	78%	(23,088)
BENEFITS EXPENSE	232,396	19,353	174,837	57,559	75%	(540)
OTHER INDIRECT EXPENSE	176,403	9,637	120,508	55,895	68%	11,795
TOTAL INDIRECT EXPENSES:	**1,160,064**	**91,606**	**881,881**	**278,183**	**76%**	**(11,833)**
TOTAL ALL EXPENSES:	**1,164,984**	**91,292**	**884,961**	**280,023**	**76%**	**(11,223)**
NET INCOME (LOSS):	**(564,984)**	**(780)**	**(245,379)**	**(319,605)**	**43%**	**178,359**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
FOUNDATION						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	3,200	-	3,200	-	100%	(800)
PRINTING & COPYING	1,000	7	7	993	1%	743
STAFF TRAVEL/PARKING	3,000	-	54	2,946	2%	2,196
SUPPLIES	2,000	-	103	1,897	5%	1,397
BOARD OF TRUSTEES	3,600	25	517	3,083	14%	2,183
EQUIPMENT/HARDWARE/SOFTWARE	2,400	220	1,976	424	82%	(176)
POSTAGE	400	-	-	400	0%	300
STAFF CONFERENCE & TRAINING	2,200	-	-	2,200	0%	1,650
TOTAL DIRECT EXPENSES:	**17,800**	**252**	**5,858**	**11,942**	**33%**	**7,492**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.05 FTE)	106,460	8,539	79,955	26,505	75%	(110)
BENEFITS EXPENSE	34,056	2,903	25,179	8,877	74%	363
OTHER INDIRECT EXPENSE	26,766	1,459	18,243	8,523	68%	1,832
TOTAL INDIRECT EXPENSES:	**167,282**	**12,901**	**123,377**	**43,905**	**74%**	**2,085**
TOTAL ALL EXPENSES:	**185,082**	**13,153**	**129,235**	**55,847**	**70%**	**9,576**
NET INCOME (LOSS):	**(185,082)**	**(13,153)**	**(129,235)**	**(55,847)**	**70%**	**9,576**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
HUMAN RESOURCES						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	300	-	97	203	32%	128
STAFF MEMBERSHIP DUES	1,000	-	528	472	53%	222
SUBSCRIPTIONS	2,000	-	993	1,007	50%	507
STAFF TRAINING- GENERAL	36,800	-	926	35,874	3%	26,674
RECRUITING AND ADVERTISING	8,000	2,394	4,683	3,317	59%	1,317
PAYROLL PROCESSING	50,000	3,820	39,080	10,920	78%	(1,580)
SALARY SURVEYS	1,000	-	-	1,000	0%	750
CONSULTING SERVICES	10,000	-	-	10,000	0%	7,500
STAFF CONFERENCE & TRAINING	2,200	26	197	2,003	9%	1,453
TRANSFER TO INDIRECT EXPENSE	(111,300)	(6,240)	(46,505)	(64,795)	42%	(36,970)
TOTAL DIRECT EXPENSES:	-	-	-	-		-
INDIRECT EXPENSES:						
SALARY EXPENSE (4.00 FTE) **	595,894	36,700	409,874	186,020	69%	37,047
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(150,000)
BENEFITS EXPENSE	115,845	11,371	105,895	9,950	91%	(19,012)
OTHER INDIRECT EXPENSE	101,967	5,569	69,632	32,335	68%	6,843
TOTAL INDIRECT EXPENSES:	**613,706**	**53,639**	**585,401**	**28,305**	**95%**	**(125,122)**
TOTAL ALL EXPENSES:	**613,706**	**53,639**	**585,401**	**28,305**	**95%**	**(125,122)**
NET INCOME (LOSS):	**(613,706)**	**(53,639)**	**(585,401)**	**(28,305)**	**95%**	**(125,122)**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LAW CLERK PROGRAM						
REVENUE:						
LAW CLERK FEES	234,000	6,500	245,326	(11,326)	105%	69,826
LAW CLERK APPLICATION FEES	3,200	300	3,900	(700)	122%	1,500
TOTAL REVENUE:	**237,200**	**6,800**	**249,226**	**(12,026)**	**105%**	**71,326**
DIRECT EXPENSES:						
SUBSCRIPTIONS	250	-	-	250	0%	188
DEPRECIATION	12,000	2,488	2,488	9,512	21%	6,512
CHARACTER & FITNESS INVESTIGATIONS	100	-	-	100	0%	75
LAW CLERK BOARD EXPENSE	8,000	849	3,576	4,424	45%	2,424
SOFTWARE HOSTING	681	59	508	173	75%	3
LAW CLERK OUTREACH	30,000	324	324	29,676	1%	22,176
TOTAL DIRECT EXPENSES:	**51,031**	**3,720**	**6,895**	**44,136**	**14%**	**31,378**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.23 FTE)	113,225	10,253	86,127	27,098	76%	(1,208)
BENEFITS EXPENSE	38,208	3,252	27,673	10,536	72%	983
OTHER INDIRECT EXPENSE	31,355	1,706	21,327	10,028	68%	2,190
TOTAL INDIRECT EXPENSES:	**182,789**	**15,211**	**135,127**	**47,662**	**74%**	**1,965**
TOTAL ALL EXPENSES:	**233,820**	**18,931**	**142,022**	**91,798**	**61%**	**33,343**
NET INCOME (LOSS):	**3,380**	**(12,131)**	**107,204**	**(103,824)**	**3171%**	**104,669**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LEGISLATIVE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	2,500	-	565	1,935	23%	1,310
STAFF MEMBERSHIP DUES	200	-	-	200	0%	150
JUD RECOMMEND COMMITTEE	2,250	341	1,675	575	74%	13
SUBSCRIPTIONS	2,000	-	1,986	14	99%	(486)
TELEPHONE	575	48	433	142	75%	(1)
CONTRACT LOBBYIST	15,000	-	15,000	-	100%	(3,750)
LEGISLATIVE REVIEW COMMITTEE	1,250	-	130	1,120	10%	808
BOG LEGISLATIVE COMMITTEE	300	-	-	300	0%	225
STAFF CONFERENCE & TRAINING	2,200	-	2,101	99	95%	(451)
TOTAL DIRECT EXPENSES:	**26,275**	**389**	**21,888**	**4,387**	**83%**	**(2,182)**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.70 FTE)	160,438	14,148	121,860	38,578	76%	(1,532)
BENEFITS EXPENSE	53,043	4,520	39,209	13,834	74%	573
OTHER INDIRECT EXPENSE	43,336	2,363	29,549	13,787	68%	2,953
TOTAL INDIRECT EXPENSES:	**256,817**	**21,031**	**190,618**	**66,199**	**74%**	**1,995**
TOTAL ALL EXPENSES:	**283,092**	**21,420**	**212,506**	**70,586**	**75%**	**(187)**
NET INCOME (LOSS):	**(283,092)**	**(21,420)**	**(212,506)**	**(70,586)**	**75%**	**(187)**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LICENSING & MEMBERSHIP RECORDS						
REVENUE:						
STATUS CERTIFICATE FEES	27,000	1,725	23,500	3,500	87%	3,250
INVESTIGATION FEES	25,000	1,700	19,900	5,100	80%	1,150
PRO HAC VICE **	425,000	46,049	348,922	76,078	82%	30,172
MEMBER CONTACT INFORMATION	5,000	950	4,448	552	89%	698
PHOTO BAR CARD SALES	200	36	468	(268)	234%	318
TOTAL REVENUE:	**482,200**	**50,460**	**397,238**	**84,962**	**82%**	**35,588**
DIRECT EXPENSES:						
POSTAGE	4,000	-	3,725	275	93%	(725)
CONSULTING SERVICES	6,000	-	6,000	-	100%	(1,500)
SOFTWARE HOSTING	18,380	1,592	13,648	4,732	74%	137
TOTAL DIRECT EXPENSES:	**28,380**	**1,592**	**23,373**	**5,008**	**82%**	**(2,088)**
INDIRECT EXPENSES:						
SALARY EXPENSE (4.83 FTE)	515,705	42,853	386,664	129,041	75%	115
BENEFITS EXPENSE	158,553	13,251	116,763	41,790	74%	2,152
OTHER INDIRECT EXPENSE	123,125	6,719	84,021	39,104	68%	8,323
TOTAL INDIRECT EXPENSES:	**797,383**	**62,823**	**587,448**	**209,935**	**74%**	**10,589**
TOTAL ALL EXPENSES:	**825,763**	**64,416**	**610,821**	**214,943**	**74%**	**8,502**
NET INCOME (LOSS):	**(343,563)**	**(13,956)**	**(213,582)**	**(129,981)**	**62%**	**44,090**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

LIMITED LICENSE LEGAL TECHNICIAN PROGRAM

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
SEMINAR REGISTRATIONS	7,000	-	5,600	1,400	80%	350
LLLT LICENSE FEES	17,731	1,369	12,071	5,660	68%	(1,227)
LLLT LATE LICENSE FEES	-	-	365	(365)		365
MCLE LATE FEES	300	(150)	-	300	0%	(225)
TOTAL REVENUE:	**25,031**	**1,219**	**18,036**	**6,995**	**72%**	**(738)**
DIRECT EXPENSES:						
LLLT BOARD	11,500	18	2,581	8,919	22%	6,044
LLLT EDUCATION	1,000	-	35	965	4%	715
TOTAL DIRECT EXPENSES:	**12,500**	**18**	**2,616**	**9,884**	**21%**	**6,759**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.48 FTE)	55,689	3,790	43,133	12,557	77%	(1,366)
BENEFITS EXPENSE	17,525	1,297	13,531	3,995	77%	(387)
OTHER INDIRECT EXPENSE	14,536	678	10,581	3,956	73%	322
TOTAL INDIRECT EXPENSES:	**87,751**	**5,765**	**67,244**	**20,507**	**77%**	**(1,431)**
TOTAL ALL EXPENSES:	**100,251**	**5,783**	**69,860**	**30,391**	**70%**	**5,328**
NET INCOME (LOSS):	**(75,220)**	**(4,565)**	**(51,825)**	**(23,396)**	**69%**	**4,591**

Washington State Bar Association

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For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

LIMITED PRACTICE OFFICERS

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
INVESTIGATION FEES	300	200	800	(500)	267%	575
MCLE LATE FEES	4,000	-	1,800	2,200	45%	(1,200)
LPO EXAMINATION FEES	23,000	-	14,700	8,300	64%	(2,550)
LPO LICENSE FEES	160,000	12,735	116,940	43,060	73%	(3,060)
LPO LATE LICENSE FEES	2,000	-	3,750	(1,750)	188%	2,250
TOTAL REVENUE:	**189,300**	**12,935**	**137,990**	**51,310**	**73%**	**(3,985)**
DIRECT EXPENSES:						
FACILITY, PARKING, FOOD	9,500	-	4,612	4,888	49%	2,513
EXAM WRITING	19,000	-	8,400	10,600	44%	5,850
LPO BOARD	4,000	230	586	3,414	15%	2,414
LPO OUTREACH	1,000	-	-	1,000	0%	750
PRINTING & COPYING	200	-	34	166	17%	116
SUPPLIES	200	-	-	200	0%	150
SOFTWARE HOSTING	3,404	295	2,528	876	74%	25
TOTAL DIRECT EXPENSES:	**37,304**	**525**	**16,161**	**21,143**	**43%**	**11,817**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.68 FTE)	66,043	5,562	49,628	16,415	75%	(96)
BENEFITS EXPENSE	21,528	1,828	15,435	6,093	72%	711
OTHER INDIRECT EXPENSE	17,590	945	11,995	5,595	68%	1,198
TOTAL INDIRECT EXPENSES:	**105,161**	**8,335**	**77,057**	**28,103**	**73%**	**1,813**
TOTAL ALL EXPENSES:	**142,465**	**8,860**	**93,218**	**49,247**	**65%**	**13,631**
NET INCOME (LOSS):	**46,835**	**4,075**	**44,773**	**2,063**	**96%**	**9,646**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MANDATORY CONTINUING LEGAL EDUCATION						
REVENUE:						
ACTIVITY APPLICATION FEE	600,000	60,300	547,600	52,400	91%	97,600
ACTIVITY APPLICATION LATE FEE	220,000	23,300	216,050	3,950	98%	51,050
MCLE LATE FEES	225,000	600	252,800	(27,800)	112%	84,050
ANNUAL ACCREDITED SPONSOR FEES	39,000	-	39,750	(750)	102%	10,500
ATTENDANCE LATE FEES	120,000	9,550	78,950	41,050	66%	(11,050)
COMITY CERTIFICATES	29,800	1,100	32,075	(2,275)	108%	9,725
TOTAL REVENUE:	**1,233,800**	**94,850**	**1,167,225**	**66,575**	**95%**	**241,875**
DIRECT EXPENSES:						
DEPRECIATION	142,183	12,012	108,108	34,075	76%	(1,471)
STAFF MEMBERSHIP DUES	500	-	500	-	100%	(125)
MCLE BOARD	4,000	-	1,806	2,194	45%	1,194
STAFF TRAVEL/PARKING	50	-	-	50	0%	38
STAFF CONFERENCE & TRAINING	4,600	-	-	4,600	0%	3,450
TOTAL DIRECT EXPENSES:	**151,333**	**12,012**	**110,414**	**40,919**	**73%**	**3,085**
INDIRECT EXPENSES:						
SALARY EXPENSE (4.76 FTE)	400,391	26,721	307,475	92,916	77%	(7,182)
BENEFITS EXPENSE	136,403	11,114	100,884	35,518	74%	1,418
OTHER INDIRECT EXPENSE	121,596	6,637	83,169	38,428	68%	8,029
TOTAL INDIRECT EXPENSES:	**658,390**	**44,473**	**491,528**	**166,862**	**75%**	**2,265**
TOTAL ALL EXPENSES:	**809,723**	**56,485**	**601,942**	**207,781**	**74%**	**5,350**
NET INCOME (LOSS):	**424,077**	**38,365**	**565,283**	**(141,206)**	**133%**	**247,225**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MEMBER SERVICES & ENGAGEMENT TEAM						
(LLB-MINI-MSE-NME)						
REVENUE:						
ROYALTIES	10,800	-	11,150	(350)	103%	3,050
NMP PRODUCT SALES	150,000	6,309	116,677	33,323	78%	4,177
DIGITAL VIDEO SALES	25,000	735	23,863	1,137	95%	5,113
SPONSORSHIPS	11,500	-	11,000	500	96%	2,375
SEMINAR REGISTRATIONS	16,000	1,080	20,142	(4,142)	126%	8,142
TRIAL ADVOCACY PROGRAM	15,000	12,287	12,287	2,713	82%	1,037
TOTAL REVENUE:	**228,300**	**20,411**	**195,119**	**33,181**	**85%**	**23,894**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,500	523	605	2,895	17%	2,020
STAFF CONFERENCE & TRAINING	2,200	767	1,825	375	83%	(175)
SMALL TOWN AND RURAL COMMITTEE	7,500	643	643	6,857	9%	4,982
PRINTING & COPYING	1,600	-	1,442	158	90%	(242)
DISABILITY ACCOMMODATIONS	2,000	-	-	2,000	0%	1,500
HONORARIUM	1,500	-	-	1,500	0%	1,125
SUBSCRIPTIONS	350	-	350	-	100%	(88)
YLL SECTION PROGRAM	1,300	-	585	715	45%	390
SMALL TOWN AND RURAL COMMITTEE OUTREACH AND ACTIVITIES	65,000	8,849	53,849	11,151	83%	(5,099)
ON24 OVERAGE CHARGE	4,500	-	4,414	86	98%	(1,039)
MEMBER ENGAGEMENT COUNCIL	500	-	-	500	0%	375
WYLC CLE COMPS	1,000	-	-	1,000	0%	750
WYLC OUTREACH EVENTS	5,000	-	3,519	1,481	70%	231
SPEAKERS & PROGRAM DEVELOP	100	-	-	100	0%	75
WYL COMMITTEE	15,000	-	778	14,222	5%	10,472
TRIAL ADVOCACY EXPENSES	2,025	1,287	1,287	738	64%	232
LAW LIBRARY DESKBOOK ACCESS	10,000	-	9,311	689	93%	(1,811)
LAW SCHOOL OUTREACH	500	-	-	500	0%	375
RECEPTION/FORUM EXPENSE	1,000	-	200	800	20%	550
INSURANCE REBATE	(3,375)	-	-	(3,375)	0%	(2,531)
STAFF MEMBERSHIP DUES	450	-	390	60	87%	(53)
LENDING LIBRARY	4,000	11	220	3,780	6%	2,780
NMP SPEAKERS & PROGRAM DEVELOPMENT	575	-	-	575	0%	431
TOTAL DIRECT EXPENSES:	**126,225**	**12,079**	**79,418**	**46,807**	**63%**	**15,250**
INDIRECT EXPENSES:						
SALARY EXPENSE (4.64 FTE)	333,094	27,574	235,499	97,594	71%	14,321
BENEFITS EXPENSE	126,899	10,699	90,696	36,203	71%	4,478
OTHER INDIRECT EXPENSE	118,282	6,452	80,681	37,601	68%	8,030
INSURANCE REBATE	(19,016)	-	-	(19,016)	0%	(14,262)
TOTAL INDIRECT EXPENSES:	**559,258**	**44,726**	**406,876**	**152,382**	**73%**	**12,567**
TOTAL ALL EXPENSES:	**685,483**	**56,805**	**486,295**	**199,188**	**71%**	**27,818**
NET INCOME (LOSS):	**(457,183)**	**(36,395)**	**(291,176)**	**(166,007)**	**64%**	**51,711**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
OFFICE OF THE EXECUTIVE DIRECTOR						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
LEADERSHIP TRAINING **	14,600	6,479	11,601	2,999	79%	(651)
WASHINGTON LEADERSHIP INSTITUTE	100,000	-	100,000	-	100%	(25,000)
ED TRAVEL & OUTREACH	6,000	262	2,391	3,609	40%	2,109
STAFF TRAVEL/PARKING	2,000	198	1,705	295	85%	(205)
STAFF CONFERENCE & TRAINING **	14,200	199	11,045	3,155	78%	(395)
STAFF MEMBERSHIP DUES	2,175	-	1,120	1,055	51%	511
TOTAL DIRECT EXPENSES:	**138,975**	**7,138**	**127,862**	**11,113**	**92%**	**(23,631)**
INDIRECT EXPENSES:						
SALARY EXPENSE (4.23 FTE) **	621,554	52,633	459,260	162,294	74%	6,906
BENEFITS EXPENSE **	161,527	14,392	124,662	36,864	77%	(3,518)
OTHER INDIRECT EXPENSE **	107,319	5,897	73,633	33,686	69%	6,856
TOTAL INDIRECT EXPENSES:	**890,399**	**72,923**	**657,555**	**232,844**	**74%**	**10,244**
TOTAL ALL EXPENSES:	**1,029,374**	**80,061**	**785,417**	**243,957**	**76%**	**(13,387)**
NET INCOME (LOSS):	**(1,029,374)**	**(80,061)**	**(785,417)**	**(243,957)**	**76%**	**(13,387)**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

OFFICE OF GENERAL COUNSEL

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
RECORDS REQUEST FEES	-	-	270	(270)		270
TOTAL REVENUE:	**-**	**-**	**270**	**(270)**		**270**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,500	318	2,544	956	73%	81
STAFF MEMBERSHIP DUES	2,090	-	1,825	265	87%	(258)
COURT RULES COMMITTEE	1,000	-	-	1,000	0%	750
COURT REPORTERS	-	-	(179)	179		179
CUSTODIANSHIPS	5,000	-	201	4,799	4%	3,549
WILLS	2,000	-	-	2,000	0%	1,500
LITIGATION EXPENSES	1,000	235	383	617	38%	367
DISABILITY ACCOMMODATIONS	6,000	-	667	5,333	11%	3,833
STAFF CONFERENCE & TRAINING	6,215	-	363	5,852	6%	4,298
SUPPLIES	-	-	104	(104)		(104)
TOTAL DIRECT EXPENSES:	**26,805**	**553**	**5,909**	**20,896**	**22%**	**14,195**
INDIRECT EXPENSES:						
SALARY EXPENSE (6.47 FTE) **	682,130	57,541	503,111	179,019	74%	8,486
BENEFITS EXPENSE	210,435	18,398	153,053	57,382	73%	4,773
OTHER INDIRECT EXPENSE	157,903	9,021	106,144	51,758	67%	12,283
TOTAL INDIRECT EXPENSES:	**1,050,467**	**84,960**	**762,308**	**288,159**	**73%**	**25,542**
TOTAL ALL EXPENSES:	**1,077,272**	**85,513**	**768,217**	**309,055**	**71%**	**39,737**
NET INCOME (LOSS):	**(1,077,272)**	**(85,513)**	**(767,947)**	**(309,325)**	**71%**	**40,007**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSE:						
STAFF MEMBERSHIP DUES	100	-	-	100	0%	75
DISCIPLINARY BOARD EXPENSES	5,000	53	921	4,079	18%	2,829
CHIEF HEARING OFFICER	40,000	3,333	29,997	10,003	75%	3
COURT REPORTERS	25,000	1,733	19,004	5,996	76%	(254)
HEARING OFFICER EXPENSES	4,000	18	97	3,903	2%	2,903
HEARING OFFICER TRAINING	1,000	-	-	1,000	0%	750
APPOINTED COUNSEL	50,400	4,200	37,800	12,600	75%	-
DISCIPLINARY SELECTION PANEL	1,000	-	-	1,000	0%	750
STAFF CONFERENCE & TRAINING	2,000	-	-	2,000	0%	1,500
TOTAL DIRECT EXPENSES:	**128,500**	**9,337**	**87,819**	**40,681**	**68%**	**8,556**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.30 FTE)	125,704	11,050	97,186	28,518	77%	(2,908)
BENEFITS EXPENSE	41,128	3,479	30,677	10,451	75%	169
OTHER INDIRECT EXPENSE	33,139	1,808	22,611	10,528	68%	2,243
TOTAL INDIRECT EXPENSES:	**199,971**	**16,337**	**150,474**	**49,497**	**75%**	**(496)**
TOTAL ALL EXPENSES:	**328,471**	**25,674**	**238,293**	**90,178**	**73%**	**8,060**
NET INCOME (LOSS):	**(328,471)**	**(25,674)**	**(238,293)**	**(90,178)**	**73%**	**8,060**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PRACTICE OF LAW BOARD						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
PRACTICE OF LAW BOARD	16,000	217	740	15,260	5%	11,260
TOTAL DIRECT EXPENSES:	**16,000**	**217**	**740**	**15,260**	**5%**	**11,260**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.35 FTE)	44,050	3,479	32,788	11,262	74%	249
BENEFITS EXPENSE	15,037	1,045	10,922	4,116	73%	356
OTHER INDIRECT EXPENSE	11,478	493	8,444	3,035	74%	165
TOTAL INDIRECT EXPENSES:	**70,566**	**5,017**	**52,154**	**18,412**	**74%**	**771**
TOTAL ALL EXPENSES:	**86,566**	**5,234**	**52,894**	**33,672**	**61%**	**12,031**
NET INCOME (LOSS):	**(86,566)**	**(5,234)**	**(52,894)**	**(33,672)**	**61%**	**12,031**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PUBLIC SERVICE PROGRAMS						
REVENUE:						
DONATIONS & GRANTS	135,280	-	134,832	448	100%	33,372
TOTAL REVENUE:	**135,280**	**-**	**134,832**	**448**	**100%**	**33,372**
DIRECT EXPENSES:						
DONATIONS/SPONSORSHIPS/GRANTS	300,000	-	238,011	61,989	79%	(13,011)
STAFF TRAVEL/PARKING	2,000	-	142	1,858	7%	1,358
PRO BONO & PUBLIC SERVICE COMMITTEE	2,500	38	361	2,139	14%	1,514
STAFF CONFERENCE & TRAINING	2,200	-	775	1,425	35%	875
PRO BONO OUTREACH	4,000	14	1,101	2,899	28%	1,899
TOTAL DIRECT EXPENSES:	**310,700**	**52**	**240,390**	**70,310**	**77%**	**(7,365)**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.62 FTE)	136,915	11,146	102,046	34,870	75%	641
BENEFITS EXPENSE	47,862	4,089	35,169	12,693	73%	728
OTHER INDIRECT EXPENSE	41,297	2,260	28,264	13,033	68%	2,708
TOTAL INDIRECT EXPENSES:	**226,074**	**17,495**	**165,478**	**60,596**	**73%**	**4,077**
TOTAL ALL EXPENSES:	**536,774**	**17,547**	**405,868**	**130,906**	**76%**	**(3,288)**
NET INCOME (LOSS):	**(401,494)**	**(17,547)**	**(271,036)**	**(130,458)**	**68%**	**30,084**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

PUBLICATION & DESIGN SERVICES

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
SUBSCRIPTIONS	200	-	88	112	44%	62
IMAGE LIBRARY	4,800	-	4,756	44	99%	(1,156)
TOTAL DIRECT EXPENSES:	**5,000**	**-**	**4,844**	**156**	**97%**	**(1,094)**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.89 FTE)	76,345	7,138	61,820	14,524	81%	(4,562)
BENEFITS EXPENSE	26,506	2,297	20,109	6,397	76%	(229)
OTHER INDIRECT EXPENSE	22,688	1,233	15,417	7,271	68%	1,599
TOTAL INDIRECT EXPENSES:	**125,539**	**10,668**	**97,346**	**28,193**	**78%**	**(3,192)**
TOTAL ALL EXPENSES:	**130,539**	**10,668**	**102,190**	**28,348**	**78%**	**(4,286)**
NET INCOME (LOSS):	**(130,539)**	**(10,668)**	**(102,190)**	**(28,348)**	**78%**	**(4,286)**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REGULATORY SERVICES FTE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	490	-	490	-	100%	(123)
STAFF CONFERENCE & TRAINING	8,400	-	932	7,468	11%	5,368
STAFF TRAVEL/PARKING	600	18	283	317	47%	167
TOTAL DIRECT EXPENSES:	**9,490**	**18**	**1,706**	**7,784**	**18%**	**5,534**
INDIRECT EXPENSES:						
SALARY EXPENSE (2.20 FTE)	299,450	25,704	226,944	72,506	76%	(2,357)
BENEFITS EXPENSE	84,363	7,102	62,891	21,472	75%	381
OTHER INDIRECT EXPENSE	56,721	3,062	38,985	17,735	69%	3,555
TOTAL INDIRECT EXPENSES:	**440,534**	**35,868**	**328,821**	**111,713**	**75%**	**1,579**
TOTAL ALL EXPENSES:	**450,024**	**35,886**	**330,527**	**119,497**	**73%**	**7,113**
NET INCOME (LOSS):	**(450,024)**	**(35,886)**	**(330,527)**	**(119,497)**	**73%**	**6,991**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

REGULATORY REFORM

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	72,500	-	10,311	62,189	14%	44,064
OUTREACH EXPENSES	10,000	-	-	10,000	0%	7,500
MEETING EXPENSE	-	-	2,098	(2,098)		(2,098)
TOTAL DIRECT EXPENSES:	**82,500**	**-**	**12,409**	**70,091**	**15%**	**-**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.80 FTE)	157,764	17,917	105,365	52,399	67%	12,958
BENEFITS EXPENSE	46,175	5,243	29,503	16,671	64%	5,128
OTHER INDIRECT EXPENSE	32,466	2,507	17,808	14,658	55%	6,541
TOTAL INDIRECT EXPENSES:	**236,405**	**25,666**	**152,677**	**83,728**	**65%**	**24,627**
TOTAL ALL EXPENSES:	**318,905**	**25,666**	**165,086**	**153,818**	**52%**	**24,627**
NET INCOME (LOSS):	**(318,905)**	**(25,666)**	**(165,086)**	**(153,818)**	**52%**	**74,092**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SERVICE CENTER						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	2,376	198	1,705	671	72%	77
STAFF CONFERENCE & TRAINING	677	-	-	677	0%	508
TOTAL DIRECT EXPENSES:	**3,053**	**198**	**1,705**	**1,348**	**56%**	**585**
INDIRECT EXPENSES:						
SALARY EXPENSE (5.78 FTE)	427,125	31,308	319,917	107,207	75%	426
BENEFITS EXPENSE	160,271	12,561	117,144	43,127	73%	3,059
OTHER INDIRECT EXPENSE	147,342	8,055	100,898	46,445	68%	9,609
TOTAL INDIRECT EXPENSES:	**734,738**	**51,924**	**537,959**	**196,779**	**73%**	**13,094**
TOTAL ALL EXPENSES:	**737,791**	**52,122**	**539,664**	**198,127**	**73%**	**13,679**
NET INCOME (LOSS):	**(737,791)**	**(52,122)**	**(539,664)**	**(198,127)**	**73%**	**13,679**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SECTIONS ADMINISTRATION						
REVENUE:						
REIMBURSEMENTS FROM SECTIONS	275,000	1,181	364,299	(89,299)	132%	158,049
TOTAL REVENUE:	**275,000**	**1,181**	**364,299**	**(89,299)**	**132%**	**158,049**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	1,500	-	60	1,440	4%	1,065
SECTION/COMMITTEE CHAIR MTGS	700	-	89	611	13%	436
STAFF MEMBERSHIP DUES	200	-	60	140	30%	90
TOTAL DIRECT EXPENSES:	**2,400**	**-**	**209**	**2,191**	**9%**	**1,591**
INDIRECT EXPENSES:						
SALARY EXPENSE (2.53 FTE)	169,092	14,525	123,134	45,958	73%	3,685
BENEFITS EXPENSE	67,073	5,728	48,738	18,334	73%	1,566
OTHER INDIRECT EXPENSE	64,494	3,555	44,415	20,079	69%	3,956
TOTAL INDIRECT EXPENSES:	**300,658**	**23,807**	**216,287**	**84,371**	**72%**	**9,207**
TOTAL ALL EXPENSES:	**303,058**	**23,807**	**216,496**	**86,562**	**71%**	**10,797**
NET INCOME (LOSS):	**(28,058)**	**(22,626)**	**147,803**	**(175,861)**	**-527%**	**168,847**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SECTIONS OPERATIONS						
REVENUE:						
SECTION DUES	438,280	1,895	570,981	(132,701)	130%	242,271
SEMINAR PROFIT SHARE	159,700	-	-	159,700	0%	(119,775)
INTEREST INCOME	2,050	-	-	2,050	0%	(1,538)
PUBLICATIONS REVENUE	1,250	-	2,279	(1,029)	182%	1,342
OTHER	44,203	6,565	30,830	13,373	70%	(2,322)
TOTAL REVENUE:	**645,483**	**8,460**	**604,091**	**41,393**	**94%**	**119,978**
DIRECT EXPENSES:						
DIRECT EXPENSES OF SECTION ACTIVITIES	759,773	27,499	248,096	511,677	33%	321,734
REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES	280,433	1,181	364,299	(83,866)	130%	(153,975)
TOTAL DIRECT EXPENSES:	**1,040,206**	**28,680**	**612,395**	**427,811**	**59%**	**167,759**
NET INCOME (LOSS):	**(394,722)**	**(20,220)**	**(8,304)**	**(386,418)**	**2%**	**287,738**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
TECHNOLOGY						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	140,000	10,321	111,577	28,423	80%	(6,577)
STAFF TRAVEL/PARKING	1,000	216	987	13	99%	(237)
STAFF MEMBERSHIP DUES	300	-	-	300	0%	225
TELEPHONE	90,000	6,766	63,505	26,495	71%	3,995
COMPUTER HARDWARE	66,200	1,274	61,452	4,748	93%	(11,802)
COMPUTER SOFTWARE	530,000	1,971	297,921	232,079	56%	99,579
HARDWARE SERVICE & WARRANTIES	50,000	5,193	39,585	10,415	79%	(2,085)
SOFTWARE MAINTENANCE & LICENSING	400,000	13,696	354,614	45,386	89%	(54,614)
THIRD PARTY SERVICES	65,000	2,992	51,756	13,244	80%	(3,006)
CLOUD INFRASTRUCTURE	130,000	4,069	43,307	86,693	33%	54,193
STAFF CONFERENCE & TRAINING	6,000	-	1,091	4,909	18%	3,409
TRANSFER TO INDIRECT EXPENSES	(1,478,500)	(46,497)	(1,025,794)	(452,706)	69%	(83,081)
TOTAL DIRECT EXPENSES:	-	-	-	-		-
INDIRECT EXPENSES:						
SALARY EXPENSE (12.00 FTE) **	1,422,045	117,042	1,052,831	369,215	74%	13,703
BENEFITS EXPENSE **	421,171	32,891	289,417	131,754	69%	26,461
CAPITAL LABOR & OVERHEAD	(75,000)	(11,481)	(104,685)	29,685	140%	(48,435)
OTHER INDIRECT EXPENSE	305,901	16,747	209,410	96,491	68%	20,015
TOTAL INDIRECT EXPENSES:	**2,074,118**	**155,199**	**1,446,974**	**627,144**	**70%**	**11,745**
TOTAL ALL EXPENSES:	**2,074,118**	**155,199**	**1,446,974**	**627,144**	**70%**	**11,745**
NET INCOME (LOSS):	**(2,074,118)**	**(155,199)**	**(1,446,974)**	**(627,144)**	**70%**	**108,615**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

VOLUNTEER ENGAGEMENT

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
POSTAGE	600	-	468	132	78%	(18)
STAFF MEMBERSHIP DUES	450	-	300	150	67%	38
STAFF CONFERENCE & TRAINING	5,200	3,554	3,554	1,646	68%	346
SUBSCRIPTIONS	816	-	716	100	88%	(104)
VOLUNTEER RECOGNITION	2,000	39	39	1,961	2%	1,461
REGULATORY SCHOOL	12,000	-	7,767	4,233	65%	1,233
ABA DELEGATES	16,000	-	5,360	10,640	34%	6,640
TOTAL DIRECT EXPENSES:	**37,066**	**3,593**	**18,205**	**18,861**	**49%**	**9,595**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.20 FTE)	127,293	8,674	89,409	37,884	70%	6,061
BENEFITS EXPENSE	43,900	3,069	32,125	11,775	73%	800
OTHER INDIRECT EXPENSE	36,980	1,685	27,024	9,956	73%	711
TOTAL INDIRECT EXPENSES:	**208,173**	**13,429**	**148,558**	**59,615**	**71%**	**7,572**
TOTAL ALL EXPENSES:	**245,239**	**17,022**	**166,763**	**78,477**	**68%**	**7,572**
NET INCOME (LOSS):	**(245,239)**	**(17,022)**	**(166,763)**	**(78,477)**	**68%**	**17,167**

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
INDIRECT EXPENSES:						
SALARIES	14,691,362	1,197,643	10,704,864	3,986,498	73%	313,657
TEMPORARY SALARIES	271,788	13,405	348,323	(76,535)	128%	(144,482)
CAPITAL LABOR & OVERHEAD	(75,000)	(11,481)	(104,685)	29,685	140%	48,435
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(150,000)
INSURANCE REBATE	(19,016)	-	-	(19,016)	0%	(14,262)
EMPLOYEE ASSISTANCE PLAN	4,800	-	3,600	1,200	75%	-
EMPLOYEE SERVICE AWARDS	2,610	60	1,790	820	69%	168
FICA (EMPLOYER PORTION)	1,112,598	87,726	798,710	313,889	72%	35,739
L&I INSURANCE	72,487	14,751	44,295	28,192	61%	10,070
WA STATE FAMILY MEDICAL LEAVE (EMPLOYI	33,236	3,080	26,091	7,145	79%	(1,164)
MEDICAL (EMPLOYER PORTION)	2,057,482	173,860	1,546,180	511,302	75%	(3,068)
RETIREMENT (EMPLOYER PORTION)	1,322,122	106,735	951,947	370,175	72%	39,645
TRANSPORTATION ALLOWANCE	34,000	321	24,543	9,457	72%	957
UNEMPLOYMENT INSURANCE	71,847	6,506	54,748	17,098	76%	(863)
TOTAL SALARY & BENEFITS EXPENSE:	**19,380,315**	**1,592,606**	**14,400,406**	**4,979,909**	**74%**	**134,830**
WORKPLACE BENEFITS	56,400	1,259	13,033	43,367	23%	29,267
HUMAN RESOURCES POOLED EXP	111,300	6,240	46,505	64,795	42%	36,970
MEETING SUPPORT EXPENSES	9,950	934	7,236	2,714	73%	226
RENT	960,000	76,573	739,588	220,412	77%	(19,588)
MOVE / DOWNSIZE EXPENSES	28,208	-	24,906	3,302	88%	(3,750)
PERSONAL PROP TAXES-WSBA	8,400	619	5,334	3,066	64%	966
FURNITURE, MAINT, LH IMP **	65,497	924	41,554	23,943	63%	7,569
OFFICE SUPPLIES & EQUIPMENT	22,164	697	11,790	10,374	53%	4,833
FURN & OFFICE EQUIP DEPRECIATION	159,628	9,569	85,771	73,857	54%	33,950
COMPUTER HARDWARE DEPRECIATION **	42,000	6,443	32,143	9,857	77%	(643)
COMPUTER SOFTWARE DEPRECIATION	49,339	3,716	36,239	13,100	73%	766
INSURANCE	288,200	21,710	195,391	92,809	68%	20,759
WORK HOME FURNITURE & EQUIP	14,000	301	1,842	12,158	13%	8,658
PROFESSIONAL FEES-AUDIT	41,000	-	36,577	4,423	89%	(5,827)
PROFESSIONAL FEES-LEGAL	200,000	17,151	123,266	76,734	62%	26,734
ONLINE LEGAL RESEARCH	86,000	6,305	64,621	21,379	75%	(121)
ACCOMODATIONS FUND	6,500	-	-	6,500	0%	4,875
TRANSLATION SERVICES	12,000	348	4,511	7,489	38%	4,489
TELEPHONE & INTERNET	33,600	2,780	24,660	8,940	73%	540
POSTAGE - GENERAL	15,500	1,347	5,977	9,523	39%	5,648
RECORDS STORAGE	28,849	4,295	27,355	1,494	95%	(5,718)
BANK FEES	30,000	(4,980)	3,201	26,799	11%	19,299
PRODUCTION MAINTENANCE & SUPPLIES	13,000	2,756	10,767	2,233	83%	(1,017)
COMPUTER POOLED EXPENSES	1,478,500	46,497	1,025,794	452,706	69%	83,081
GAIN (LOSS) ASSETS	-	-	1,396	(1,396)		(1,396)
TOTAL OTHER INDIRECT EXPENSES:	**3,760,035**	**205,482**	**2,569,456**	**1,190,579**	**68%**	**250,570**
TOTAL INDIRECT EXPENSES:	**23,140,350**	**1,798,088**	**16,969,862**	**6,170,488**	**73%**	**385,400**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

Statement of Activities

For the Period from June 1, 2025 to June 30, 2025

75% OF YEAR COMPLETE

SUMMARY PAGE	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE
ACCESS TO JUSTICE	(389,284)	(23,520)	(290,560)	(98,723)
ADMISSIONS/BAR EXAM	115,136	3,421	661,162	(546,027)
ADVANCEMENT FTE	(392,492)	(32,300)	(286,621)	(105,871)
BAR NEWS	(140,492)	301	(74,962)	(65,531)
BOARD OF GOVERNORS	(584,797)	(22,043)	(359,508)	(225,289)
CLE - PRODUCTS	616,909	3,627	537,954	78,955
CLE - SEMINARS	(543,860)	(69,494)	(339,395)	(204,465)
CLIENT PROTECTION FUND	239,353	9,673	847,719	(608,366)
CHARACTER & FITNESS BOARD	(175,016)	(12,399)	(116,789)	(58,227)
COMMUNICATIONS	(899,023)	(100,604)	(590,570)	(308,453)
COMMUNICATIONS FTE	(250,494)	(21,210)	(192,980)	(57,513)
DESKBOOKS	(203,495)	(17,746)	(160,503)	(42,992)
DISCIPLINE	(6,430,980)	(501,004)	(4,601,267)	(1,829,713)
DIVERSITY	(311,791)	(25,380)	(142,178)	(169,613)
FINANCE	(564,984)	(780)	(245,379)	(319,605)
FOUNDATION	(185,082)	(13,153)	(129,235)	(55,847)
HUMAN RESOURCES	(613,706)	(53,639)	(585,401)	(28,305)
LAW CLERK PROGRAM	3,380	(12,131)	107,204	(103,824)
LEGISLATIVE	(283,092)	(21,420)	(212,506)	(70,586)
LEGAL LUNCHBOX	(5,554)	(3,526)	(10,959)	5,405
LICENSE FEES	17,492,616	1,407,088	13,073,535	4,419,081
LICENSING AND MEMBERSHIP	(343,563)	(13,956)	(213,582)	(129,981)
LIMITED LICENSE LEGAL TECHNICIAN	(75,220)	(4,565)	(51,825)	(23,396)
LIMITED PRACTICE OFFICERS	46,835	4,075	44,773	2,063
MANDATORY CLE ADMINISTRATION	424,077	38,365	565,283	(141,206)
MEMBER WELLNESS PROGRAM	(231,844)	(18,640)	(171,524)	(60,320)
MINI CLE	(120,867)	(9,707)	(89,413)	(31,454)
MEMBER SERVICES & ENGAGEMENT	(398,049)	(31,914)	(257,959)	(140,090)
NEW MEMBER EDUCATION	67,287	8,751	67,169	118
OFFICE OF GENERAL COUNSEL	(1,077,272)	(85,513)	(767,947)	(309,325)
OFFICE OF THE EXECUTIVE DIRECTOR	(1,029,374)	(80,061)	(785,417)	(243,957)
OGC-DISCIPLINARY BOARD	(328,471)	(25,674)	(238,293)	(90,178)
PRACTICE OF LAW BOARD	(86,566)	(5,234)	(52,894)	(33,672)
PRACTICE MANAGEMENT ASSISTANCE	(175,060)	(10,950)	(145,449)	(29,611)
PROFESSIONAL RESPONSIBILITY PROGRAM	(217,719)	(17,092)	(159,674)	(58,045)
PUBLIC SERVICE PROGRAMS	(401,494)	(17,547)	(271,036)	(130,458)
PUBLICATION & DESIGN SERVICES	(130,539)	(10,668)	(102,190)	(28,348)
REGULATORY SERVICES FTE	(450,024)	(35,886)	(330,527)	(119,497)
REGULATORY REFORM	(318,905)	(25,666)	(165,086)	(153,818)
SECTIONS ADMINISTRATION	(28,058)	(22,626)	147,803	(175,861)
SECTIONS OPERATIONS	(394,722)	(20,220)	(8,304)	(386,418)
SERVICE CENTER	(737,791)	(52,122)	(539,664)	(198,127)
TECHNOLOGY	(2,074,118)	(155,199)	(1,446,974)	(627,144)
VOLUNTEER EDUCATION	(245,239)	(17,022)	(166,763)	(78,477)
INDIRECT EXPENSES	23,140,350	1,798,088	16,969,862	6,170,488
TOTAL OF ALL	**(21,306,907)**	**(1,682,780)**	**(18,719,128)**	**(2,587,779)**
NET INCOME (LOSS)	**(1,833,444)**	**(115,309)**	**1,749,266**	**(3,582,709)**

WASHINGTON STATE
BAR ASSOCIATION

Financial Reports

(Unaudited)

Year to Date July 31, 2025

Prepared by
Maggie Yu, Controller

Submitted by
Tiffany Lynch, Director of Finance
August 20, 2025

WASHINGTON STATE BAR ASSOCIATION

To: Board of Governors
Budget and Audit Committee

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

Re: Key Financial Benchmarks for the Preliminary Fiscal Year to Date (YTD) through July 31, 2025, As % of Completion to Annual Budget

	% of Year	Current Year % YTD	Current Year $ Difference Favorable/(Unfavorable)	Prior Year YTD	Comments
Total Salaries & Benefits	**83%**	**83%**	**$111,606**	**83%**	**Favorable to budget due to higher capital labor and lower than budgeted FICA, L&I, and retirement.**
Other Indirect Expenses*	**83%**	**75%**	**$320,279**	**76%**	**Favorable to budget mainly due to timing of workplace benefits, depreciation expenses, and lower than budgeted bank fees, HR, legal, and insurance expenses.**
Total Indirect Expenses	**83%**	**81%**	**$431,885**	**82%**	**Favorable to budget resulting from other indirect expenses described above.**
General Fund Revenues	**83%**	**88%**	**$1,005,580**	**88%**	**Favorable to budget due to timing of donations and fee collection for bar exam, bar news advertising, and law clerks; higher revenue than budget for MCLE fees, Pro Hac Vice, and interest income.**
General Fund Indirect Expenses	**83%**	**82%**	**$379,464**	**82%**	**Favorable to budget as described for indirect expenses above.**
General Fund Direct Expenses	**83%**	**67%**	**$519,003**	**67%**	**Favorable to budget due to timing of program activities and meetings/events and planned areas of underspending for the Moderate Means Program, Bar News printing & copying, Board of Governors conferences and elections, and Diversity Events & Projects.**
General Fund Net	**83%**	**140%**	**$1,904,047**	**109%**	**Favorable to budget for the reasons described above.**
CLE Revenue	**83%**	**86%**	**$38,698**	**92%**	**Favorable to budget mainly due to timing of sponsors payment and product sales.**
CLE Direct Expenses	**83%**	**74%**	**$33,965**	**59%**	**Favorable to budget due to timing of expenses for seminar activities and product sales.**
CLE Indirect Expenses	**83%**	**80%**	**$49,279**	**81%**	**Favorable to budget mainly due to other indirect savings as described above.**
CLE Net	**83%**	**10%**	**$121,942**	**321%**	**Favorable to budget primarily due to timing of direct expenses.**

*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 July 1, 2025 to July 31, 2025

Category	Actual Revenues	Reforcasted Revenues	Actual Indirect Expenses	Reforecasted Indirect Expenses	Actual Direct Expenses	Reforecasted Direct Expenses	Actual Total Expenses	Reforecasted Total Expenses	Actual Net Result	Reforecasted Net Result
Access to Justice	-	-	205,125	249,489	90,284	139,795	295,410	389,284	(295,410)	(389,284)
Admissions/Bar Exam	1,614,435	1,480,180	742,576	882,840	341,769	482,204	1,084,345	1,365,044	530,090	115,136
Advancement FTE		-	316,931	389,192	3,496	3,300	320,428	392,492	(320,428)	(392,492)
Bar News	499,471	589,600	261,574	329,917	316,177	400,175	577,751	730,092	(78,280)	(140,492)
Board of Governors	-	-	180,002	224,497	227,885	360,300	407,888	584,797	(407,888)	(584,797)
Character & Fitness Board	-	-	117,063	142,016	15,840	33,000	132,902	175,016	(132,902)	(175,016)
Communications Strategies	2,912	600	543,941	719,328	115,691	180,295	659,632	899,623	(656,720)	(899,023)
Communications Strategies FTE		-	212,866	250,494	-	-	212,866	250,494	(212,866)	(250,494)
Discipline	63,392	90,000	5,055,878	6,319,195	103,074	201,785	5,158,951	6,520,980	(5,095,559)	(6,430,980)
Diversity	135,000	135,000	287,241	375,891	12,477	70,900	299,718	446,791	(164,719)	(311,791)
Finance	722,432	600,000	970,969	1,160,064	3,448	4,920	974,416	1,164,984	(251,985)	(564,984)
Foundation	-	-	136,569	167,282	6,078	17,800	142,647	185,082	(142,647)	(185,082)
Human Resources	-	-	636,957	613,706	-	-	636,957	613,706	(636,957)	(613,706)
Law Clerk Program	247,693	237,200	149,635	182,789	11,113	51,031	160,748	233,820	86,945	3,380
Legislative	-	-	210,775	256,817	21,936	26,275	232,712	283,092	(232,712)	(283,092)
Legal Lunchbox	33,892	34,000	43,677	34,829	4,414	4,725	48,091	39,554	(14,199)	(5,554)
Licensing and Membership Records	443,338	482,200	647,176	797,383	25,094	28,380	672,269	825,763	(228,931)	(343,563)
Licensing Fees	14,486,567	17,492,616	-	-	-	-	0	-	14,486,567	17,492,616
Limited License Legal Technician	19,404	25,031	73,016	87,751	2,737	12,500	75,754	100,251	(56,349)	(75,220)
Limited Practice Officers	150,867	189,300	85,228	105,161	18,751	37,304	103,978	142,465	46,889	46,835
Mandatory CLE	1,244,925	1,233,800	538,206	658,390	122,426	151,333	660,632	809,723	584,293	424,077
Member Wellness Program	1,500	10,000	188,456	229,939	2,809	11,905	191,265	241,844	(189,765)	(231,844)
Member Services & Engagement	15,430	16,300	221,041	295,449	83,182	118,900	304,223	414,349	(288,794)	(398,049)
Mini CLE	-	-	99,058	120,867	-	-	99,058	120,867	(99,058)	(120,867)
New Member Education	156,342	178,000	88,103	108,113	2,538	2,600	90,641	110,713	65,701	67,287
Office of General Counsel	270	-	846,721	1,050,467	6,432	26,805	853,153	1,077,272	(852,883)	(1,077,272)
Office of the Executive Director	-	-	728,356	890,399	128,474	138,975	856,831	1,029,374	(856,831)	(1,029,374)
OGC-Disciplinary Board	-	-	166,060	199,971	95,815	128,500	261,874	328,471	(261,874)	(328,471)
Practice of Law Board	-	-	57,055	70,566	740	16,000	57,795	86,566	(57,795)	(86,566)
Practice Management Assistance	55,654	62,000	116,752	143,410	90,586	93,650	207,338	237,060	(151,683)	(175,060)
Professional Responsibility Program	-	-	172,895	210,019	3,106	7,700	176,001	217,719	(176,001)	(217,719)
Public Service Programs	134,832	135,280	183,269	226,074	252,488	310,700	435,757	536,774	(300,925)	(401,494)
Publication and Design Services	-	-	107,525	125,539	4,844	5,000	112,369	130,539	(112,369)	(130,539)
Regulatory Services FTE			363,421	440,534	2,287	9,490	365,708	450,024	(365,708)	(450,024)
Regulatory Reform	-	-	176,783	236,405	12,409	82,500	189,193	318,905	(189,193)	(318,905)
Sections Administration	365,646	275,000	239,715	300,658	209	2,400	239,925	303,058	125,721	(28,058)
Service Center	-	-	588,032	734,738	1,903	3,053	589,935	737,791	(589,935)	(737,791)
Volunteer Engagement	-	-	162,140	208,173	18,205	37,066	180,345	245,239.42	(180,345)	(245,239)
Technology	-	-	1,710,141	2,074,118	-	-	1,710,141	2,074,118	(1,710,141)	(2,074,118)
Subtotal General Fund	**20,394,002**	23,266,107	**17,630,926**	**21,612,469**	**2,148,719**	3,201,266	**19,779,645**	24,813,735	**614,356**	**(1,547,628)**
Expenses using Facilities Reserve funds			(164,222)				(164,222)	(169,206)	164,222	169,206
Expenses using Special Project Reserve funds			(176,783)		(12,409)		(189,193)	(318,905)	189,193	318,905
Total General Fund - Net Result from Operations	**20,394,002**		**17,289,920**		**2,136,310**		**19,426,230**	**24,325,624**	**967,771**	**(1,059,517)**
Percentage of Budget	**88%**		**82%**		**67%**		**80%**			
CLE-Seminars and Products	1,292,935	1,443,710	834,313	1,063,549	218,055	307,112	1,052,368	1,370,661	240,567	73,049
CLE - Deskbooks	58,021	131,000	235,653	279,545	49,698	54,950	285,351	334,495	(227,330)	(203,495)
Total CLE	1,350,956	1,574,710	1,069,966	1,343,094	267,753	362,062	1,337,719	1,705,156	13,236	(130,446)
Percentage of Budget	**86%**		**80%**		**74%**		**78%**	(11,269)	9,502	11,269
Expenses using Facilities Reserve funds			(9,502)				(9,502)	**1,693,887**	**22,738**	**(119,177)**
Total CLE Fund - Net Result from Operations			**1,060,465**				**1,328,218**			
Total All Sections	609,821	645,483	-	-	654,084	1,040,206	654,084	1,040,206	(44,264)	(394,722)
Client Protection Fund-Restricted	924,138	930,540	150,848	184,787	(83,228)	506,400	67,619	691,187	856,519	239,353
Expenses using Facilities Reserve funds			(1,461)				(1,461)	(1,518)	1,461	1,518
Total CPF Fund - Net Result from Operations			**149,387**				**66,159**	**689,669**	**857,980**	**240,871**
Totals	**23,278,916**	**26,416,840**	**18,851,740**	**23,140,350**	**2,987,328**	**5,109,934**	**21,839,068**	**28,250,284**	**1,439,848**	**(1,833,444)**
Totals Net of Use of Facilities Reserve Funds			(175,185)				(175,185)	**27,749,386**	175,185	**(1,332,546)**
Totals Net of Use of Special Project Reserve Funds			(176,783)		(12,409)		(189,193)		189,193	
			18,499,772		**2,974,919**		**21,474,691**		**1,804,226**	
Percentage of Budget	**88%**		**81%**		**58%**		**77%**			

Summary of Fund Balances:	Fund Balances Sept. 30, 2024	2025 Reforecasted Fund Balances	Fund Balances Year to date
Restricted Funds:			
Client Protection Fund	4,759,353	4,998,705	5,617,332
Board-Designated Funds (Non-General Fund):			
CLE Fund Balance	1,344,457	1,214,012	1,367,196
Section Funds	2,123,665	1,728,943	2,079,401
Board-Designated Funds (General Fund):			
Operating Reserve Fund	2,500,000	2,500,000	2,500,000
Facilities Reserve Fund	207,286	-	157,847
Special Projects and Innovation Fund	400,000	81,095	210,807
Unrestricted Funds (General Fund):			
Unrestricted General Fund	7,019,063	5,997,626	7,861,089
Total General Fund Balance	**10,126,350**	**8,578,721**	**10,729,744**
Net Change in Total General Fund Balance		**(1,547,628)**	**614,356**
Total Fund Balance	**18,353,825**	**16,520,381**	**19,793,673**
Net Change In Fund Balance		**(1,833,444)**	**1,439,848**

Washington State Bar Association
Analysis of Cash Investments
As of July 31, 2025

Checking & Savings Accounts

General Fund

Checking

Bank	Account	Amount
Wells Fargo	General	1,363,439
	Total	

Investments	Rate (yield)	Amount
Wells Fargo Money Market	4.23%	9,719,056
UBS Financial Money Market	4.07%	1,173,086
CDs/Treasuries	see list	9,498,162
	General Fund Total	**21,753,743**

Client Protection Fund

Checking

Bank	Amount
Wells Fargo	162,143

Investments	Rate (yield)	Amount
Wells Fargo Money Market	4.23%	2,206,313
CDs/Treasuries	see list	3,454,568
	Client Protection Fund Total	**5,823,023**

Grand Total Cash & Investments	**27,576,766**

Washington State Bar Association
Analysis of Cash Investments
As of July 31, 2025

General Fund

Bank	Yield	Term Months	Trade Date	Settle Date	Maturity Date	Amount
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
State Bank India CD	4.25%	9	3/17/2025	3/24/2025	12/19/2025	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
Zions Bancorp NA CD	4.15%	9	3/28/2025	4/2/2025	1/2/2026	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
Preferred Bank LA Calif CD	4.30%	9	5/28/2025	5/30/2025	2/27/2026	250,000
Southeast Bank CD	4.25%	9	5/28/2025	5/30/2025	2/27/2026	250,000
Norway Savings Bank CD	4.25%	9	5/28/2025	6/2/2025	3/2/2026	250,000
Old National Bank CD	4.25%	9	5/28/2025	5/29/2025	3/2/2026	250,000
Wells Fargo CD	4.25%	12	2/24/2025	3/5/2025	3/5/2026	250,000
Fortis Bankus CD	4.25%	12	3/28/2025	4/11/2025	4/10/2026	250,000
Southstate Bank NA	4.40%	10	6/12/2025	6/18/2025	4/20/2026	250,000
Israel Discount Bk of NY CD	4.00%	12	4/22/2025	4/28/2025	4/28/2026	250,000
Northern Bank & Trust MA CD	4.20%	9	7/28/2025	7/30/2025	4/30/2026	250,000
Citizens N/B Bluffton CD	4.10%	10	7/28/2025	7/31/2025	5/29/2026	250,000
Bank of Baroda CD	4.35%	12	6/12/2025	6/17/2025	6/17/2026	250,000
Merrick Bank CD	4.30%	12	6/12/2025	6/20/2025	6/18/2026	250,000
Simmons Bank/Pine Bluff CD	4.20%	12	6/12/2025	6/20/2025	6/18/2026	250,000
BCB Community Bank NY CD	4.05%	12	7/7/2025	7/18/2025	7/17/2026	250,000
Bank Hapoalim BM CD	4.15%	12	7/28/2025	7/31/2025	7/29/2026	250,000
Citibank NA CD	4.15%	12	7/28/2025	7/31/2025	7/31/2026	250,000
US T- Bill's						
US Treasury Bill	4.15%	4	4/22/2025	4/23/2025	8/19/2025	493,379
US Treasury Bill	4.22%	6	2/21/2025	2/24/2025	8/31/2025	514,177
US Treasury Bill	4.30%	11	11/26/2024	11/27/2024	10/30/2025	240,364
					Total	**9,498,162**

Washington State Bar Association
Analysis of Cash Investments
As of July 31, 2025

Client Fund Protection Fund

Bank	Yield	Term Months	Trade Date	Settle Date	Maturity Date	Amount
Dollar Bank CD	4.15%	12	12/12/2024	12/20/2024	12/19/2025	250,000
Mizuho Bank USA CD	4.20%	9	3/17/2025	3/26/2025	12/26/2025	250,000
Bank of China/NY CD	4.25%	9	5/28/2025	5/30/2025	2/27/2026	250,000
Commerce Bank Geneva MN CD	4.30%	9	6/12/2025	6/18/2025	3/18/2026	250,000
US T- Bill's						
US Treasury Bill	4.12%	4	4/7/2025	4/8/2025	8/5/2025	246,686
US Treasury Bill	4.00%	4	4/22/2025	4/23/2025	8/19/2025	493,379
US Treasury Bill	4.20%	6	2/21/2025	2/24/2025	8/21/2025	489,963
US Treasury Bill	4.20%	4	7/28/2025	7/29/2025	11/25/2025	493,248
US Treasury Bill	4.30%	10	11/26/2024	11/27/2024	10/2/2025	241,143
US Treasury Bill	4.12%	6	7/7/2025	7/8/2025	1/2/2026	490,148
					Total	**3,454,568**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LICENSE FEES						
REVENUE:						
LICENSE FEES	17,492,616	1,413,033	14,486,567	3,006,049	83%	(90,613)
TOTAL REVENUE:	**17,492,616**	**1,413,033**	**14,486,567**	**3,006,049**	**83%**	**(90,613)**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

ADMISSIONS

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
EXAM SOFTWARE REVENUE	27,500	-	8,150	19,350	30%	(14,767)
BAR EXAM FEES	1,378,980	57,555	1,540,050	(161,070)	112%	390,900
RULE 9/LEGAL INTERN FEES	12,500	450	14,550	(2,050)	116%	4,133
SPECIAL ADMISSIONS	61,200	8,355	51,685	9,515	84%	685
TOTAL REVENUE:	**1,480,180**	**66,360**	**1,614,435**	**(134,255)**	**109%**	**380,952**
DIRECT EXPENSES:						
POSTAGE	2,000	133	2,527	(527)	126%	(861)
STAFF TRAVEL/PARKING	24,000	4,260	12,524	11,476	52%	7,476
STAFF MEMBERSHIP DUES	495	250	495	-	100%	(83)
SUPPLIES	4,000	362	4,340	(340)	108%	(1,006)
FACILITY, PARKING, FOOD	100,000	98,781	141,929	(41,929)	142%	(58,595)
EXAMINER FEES	44,500	21,000	42,750	1,750	96%	(5,667)
UBE EXMINATIONS	118,000	-	41,448	76,552	35%	56,885
BOARD OF BAR EXAMINERS	42,500	-	7,511	34,989	18%	27,906
BAR EXAM PROCTORS	23,000	1,064	10,496	12,504	46%	8,671
DISABILITY ACCOMMODATIONS	65,000	331	31,840	33,160	49%	22,327
CHARACTER & FITNESS INVESTIGATIONS	1,000	-	700	300	70%	133
LAW SCHOOL VISITS	2,000	-	21	1,979	1%	1,646
SOFTWARE HOSTING	45,609	4,271	38,150	7,459	84%	(142)
STAFF CONFERENCE & TRAINING	10,100	-	7,040	3,060	70%	1,376
TOTAL DIRECT EXPENSES:	**482,204**	**130,451**	**341,769**	**140,435**	**71%**	**60,067**
INDIRECT EXPENSES:						
SALARY EXPENSE (6.17 FTE)	531,757	43,434	462,419	69,338	87%	(19,288)
BENEFITS EXPENSE	187,665	13,363	155,648	32,016	83%	739
OTHER INDIRECT EXPENSE	163,419	10,184	124,508	38,911	76%	11,674
TOTAL INDIRECT EXPENSES:	**882,840**	**66,981**	**742,576**	**140,265**	**84%**	**(6,875)**
TOTAL ALL EXPENSES:	**1,365,044**	**197,432**	**1,084,345**	**280,699**	**79%**	**53,192**
NET INCOME (LOSS):	**115,136**	**(131,072)**	**530,090**	**(414,954)**	**460%**	**434,144**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

ADVANCEMENT FTE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF CONFERENCE & TRAINING	3,300	3,376	3,496	(196)	106%	(746)
TOTAL DIRECT EXPENSES:	**3,300**	**3,376**	**3,496**	**(196)**	**106%**	**(746)**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.96 FTE)	264,525	21,839	219,168	45,357	83%	1,270
BENEFITS EXPENSE	74,703	5,351	60,349	14,354	81%	1,903
OTHER INDIRECT EXPENSE	49,964	3,240	37,414	12,550	75%	4,222
TOTAL INDIRECT EXPENSES:	**389,192**	**30,430**	**316,931**	**72,261**	**81%**	**7,395**
TOTAL ALL EXPENSES:	**392,492**	**33,807**	**320,428**	**72,064**	**82%**	**6,649**
NET INCOME (LOSS):	**(392,492)**	**(33,807)**	**(320,428)**	**(72,064)**	**82%**	**6,649**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ACCESS TO JUSTICE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
ATJ BOARD RETREAT	6,000	-	5,181	820	86%	(181)
LEADERSHIP TRAINING	6,000	(2,047)	5,529	471	92%	(529)
ATJ BOARD EXPENSE	58,500	-	47,318	11,182	81%	1,432
STAFF TRAVEL/PARKING	2,800	293	1,644	1,156	59%	689
STAFF CONFERENCE & TRAINING	2,495	-	1,570	925	63%	509
PUBLIC DEFENSE	4,000	-	2,279	1,721	57%	1,054
CONFERENCE/INSTITUTE EXPENSE	30,000	(12,824)	9,876	20,124	33%	15,124
RECEPTION/FORUM EXPENSE	30,000	-	16,887	13,113	56%	8,113
TOTAL DIRECT EXPENSES:	**139,795**	**(14,578)**	**90,284**	**49,511**	**65%**	**26,211**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.63 FTE)	155,733	12,975	131,206	24,527	84%	(1,428)
BENEFITS EXPENSE	51,565	3,749	42,169	9,396	82%	802
OTHER INDIRECT EXPENSE	42,191	2,704	31,751	10,440	75%	3,408
TOTAL INDIRECT EXPENSES:	**249,489**	**19,428**	**205,125**	**44,363**	**82%**	**2,782**
TOTAL ALL EXPENSES:	**389,284**	**4,850**	**295,410**	**93,874**	**76%**	**28,993**
NET INCOME (LOSS):	**(389,284)**	**(4,850)**	**(295,410)**	**(93,874)**	**76%**	**28,993**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
BAR NEWS						
REVENUE:						
ROYALTIES	2,000	-	-	2,000	0%	(1,667)
DISPLAY ADVERTISING	405,000	53,592	409,235	(4,235)	101%	71,735
SUBSCRIPT/SINGLE ISSUES	100	-	108	(8)	108%	25
CLASSIFIED ADVERTISING	2,500	422	3,859	(1,359)	154%	1,776
JOB TARGET ADVERSTISING	180,000	8,565	86,269	93,731	48%	(63,731)
TOTAL REVENUE:	**589,600**	**62,579**	**499,471**	**90,129**	**85%**	**8,137**
DIRECT EXPENSES:						
POSTAGE	135,000	16,417	122,730	12,270	91%	(10,230)
PRINTING, COPYING & MAILING **	261,500	25,732	192,045	69,455	73%	25,872
DIGITAL/ONLINE DEVELOPMENT	2,000	-	903	1,097	45%	764
GRAPHICS/ARTWORK	1,000	-	75	925	8%	758
EDITORIAL ADVISORY COMMITTEE	300	-	-	300	0%	250
STAFF MEMBERSHIP DUES	150	220	220	(70)	147%	(95)
SUBSCRIPTIONS	225	-	204	21	91%	(17)
TOTAL DIRECT EXPENSES:	**400,175**	**42,369**	**316,177**	**83,998**	**79%**	**17,302**
INDIRECT EXPENSES:						
SALARY EXPENSE (2.13 FTE)	207,867	15,361	168,208	39,658	81%	5,014
BENEFITS EXPENSE	67,753	4,659	52,857	14,896	78%	3,604
OTHER INDIRECT EXPENSE	54,297	3,508	40,508	13,789	75%	4,739
TOTAL INDIRECT EXPENSES:	**329,917**	**23,528**	**261,574**	**68,343**	**79%**	**13,357**
TOTAL ALL EXPENSES:	**730,092**	**65,897**	**577,751**	**152,342**	**79%**	**30,660**
NET INCOME (LOSS):	**(140,492)**	**(3,318)**	**(78,280)**	**(62,212)**	**56%**	**38,797**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
BOARD OF GOVERNORS						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
BOG MEETINGS	148,000	19,954	110,390	37,610	75%	12,943
BOG COMMITTEES' EXPENSES **	8,500	-	4,750	3,750	56%	2,334
BOG RETREAT **	43,000	647	38,775	4,225	90%	(2,942)
BOG CONFERENCE ATTENDANCE **	36,500	-	31,162	5,338	85%	(746)
BOG TRAVEL & OUTREACH	50,000	8,013	24,254	25,746	49%	17,413
LEADERSHIP TRAINING	15,000	-	-	15,000	0%	12,500
BOG ELECTIONS	42,000	-	16,298	25,703	39%	18,703
PRESIDENT'S DINNER	10,000	-	0	10,000	0%	8,333
NEW GOVERNOR ORIENTATION **	3,500	-	177	3,323	5%	2,739
PRESIDENT'S PHOTO	3,300	1,966	1,966	1,334	60%	784
SUPPLIES	500	29	113	387	23%	304
TOTAL DIRECT EXPENSES:	**360,300**	**30,610**	**227,885**	**132,415**	**63%**	**72,365**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.73 FTE) **	132,168	11,301	108,146	24,023	82%	1,994
BENEFITS EXPENSE **	48,740	3,619	38,928	9,811	80%	1,688
OTHER INDIRECT EXPENSE **	43,589	2,850	32,928	10,661	76%	3,396
TOTAL INDIRECT EXPENSES:	**224,497**	**17,770**	**180,002**	**44,495**	**80%**	**7,079**
TOTAL ALL EXPENSES:	**584,797**	**48,380**	**407,888**	**176,909**	**70%**	**79,443**
NET INCOME (LOSS):	**(584,797)**	**(48,380)**	**(407,888)**	**(176,909)**	**70%**	**79,443**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CHARACTER & FITNESS BOARD						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CHARACTER & FITNESS BOARD EXP	18,000	1,710	7,881	10,119	44%	7,119
COURT REPORTERS	15,000	3,211	7,959	7,041	53%	4,541
TOTAL DIRECT EXPENSES:	**33,000**	**4,920.73**	**15,840**	**17,160**	**48%**	**11,660**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.75 FTE)	95,315	7,957	80,142	15,173	84%	(713)
BENEFITS EXPENSE	27,582	1,993	22,574	5,008	82%	411
OTHER INDIRECT EXPENSE	19,119	1,242	14,347	4,772	75%	1,586
TOTAL INDIRECT EXPENSES:	**142,016**	**11,192**	**117,063**	**24,953**	**82%**	**1,284**
TOTAL ALL EXPENSES:	**175,016**	**16,113**	**132,902**	**42,114**	**76%**	**12,944**
NET INCOME (LOSS):	**(175,016)**	**(16,113)**	**(132,902)**	**(42,114)**	**76%**	**12,944**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
CONTINUING LEGAL EDUCATION (CLE)						
(CLES - CLEP)						
REVENUE:						
SEMINAR REGISTRATIONS	725,000	68,741	455,837	269,163	63%	(148,330)
SEMINAR REVENUE-OTHER	20,000	11,250	27,350	(7,350)	137%	10,683
SEMINAR SPLITS W/ CLE	(150,000)	-	-	(150,000)	0%	125,000
SHIPPING & HANDLING	210	-	99	111	47%	(76)
COURSEBOOK SALES	3,500	-	745	2,755	21%	(2,172)
MP3 AND VIDEO SALES	845,000	116,286	808,904	36,096	96%	104,738
TOTAL REVENUE:	**1,443,710**	**196,277**	**1,292,935**	**150,775**	**90%**	**(12,647)**
DIRECT EXPENSES:						
COURSEBOOK PRODUCTION	500	-	-	500	0%	417
DEPRECIATION	2,012	170	1,700	312	84%	(23)
ONLINE EXPENSES	54,000	15,635	43,802	10,198	81%	1,198
ACCREDITATION FEES	3,000	(84)	1,836	1,164	61%	664
FACILITIES	165,000	51,710	145,867	19,133	88%	(8,367)
DISABILITY ACCOMMODATIONS	7,000	-	-	7,000	0%	5,833
SPEAKERS & PROGRAM DEVELOP	48,000	1,107	16,442	31,558	34%	23,558
HONORARIA	3,000	-	-	3,000	0%	2,500
CLE SEMINAR COMMITTEE	200	-	-	200	0%	167
STAFF TRAVEL/PARKING	15,000	4,644	7,378	7,622	49%	5,122
STAFF CONFERENCE & TRAINING	6,900	678	678	6,222	10%	5,072
STAFF MEMBERSHIP DUES	1,500	-	-	1,500	0%	1,250
SUPPLIES	500	236	236	264	47%	181
COST OF SALES - COURSEBOOKS	300	-	58	242	19%	192
POSTAGE & DELIVERY-COURSEBOOKS	200	-	59	141	30%	107
TOTAL DIRECT EXPENSES:	**307,112**	**74,097**	**218,055**	**89,057**	**71%**	**37,872**
INDIRECT EXPENSES:						
SALARY EXPENSE (8.00 FTE)	630,924	50,437	501,401	129,523	79%	24,369
BENEFITS EXPENSE	228,691	16,529	180,443	48,248	79%	10,132
OTHER INDIRECT EXPENSE	203,934	13,205	152,469	51,465	75%	17,476
TOTAL INDIRECT EXPENSES:	**1,063,549**	**80,172**	**834,313**	**229,235**	**78%**	**51,977**
TOTAL ALL EXPENSES:	**1,370,661**	**154,268**	**1,052,368**	**318,292**	**77%**	**89,849**
NET INCOME (LOSS):	**73,049**	**42,008**	**240,567**	**(167,518)**	**329%**	**179,692**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

CLIENT PROTECTION FUND

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
CPF RESTITUTION	10,000	559	19,836	(9,836)	198%	11,503
CPF MEMBER ASSESSMENTS	720,540	3,800	719,400	1,140	100%	118,950
INTEREST INCOME	200,000	18,828	184,902	15,098	92%	18,236
TOTAL REVENUE:	**930,540**	**23,186**	**924,138**	**6,402**	**99%**	**148,688**
DIRECT EXPENSES:						
BANK FEES	2,500	(99)	(3,101)	5,601	-124%	5,184
GIFTS TO INJURED CLIENTS	500,000	-	(80,480)	580,480	-16%	497,147
CPF BOARD EXPENSES	2,000	-	353	1,647	18%	1,314
STAFF CONFERENCE & TRAINING	1,700	-	-	1,700	0%	1,417
STAFF MEMBERSHIP DUES	200	-	-	200	0%	167
TOTAL DIRECT EXPENSES:	**506,400**	**(99)**	**(83,228)**	**589,628**	**-16%**	**505,228**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.23 FTE)	115,160	9,664	96,464	18,696	84%	(497)
BENEFITS EXPENSE	38,272	2,799	31,035	7,237	81%	858
OTHER INDIRECT EXPENSE	31,355	2,022	23,349	8,006	74%	2,780
TOTAL INDIRECT EXPENSES:	**184,787**	**14,485**	**150,848**	**33,939**	**82%**	**3,141**
TOTAL ALL EXPENSES:	**691,187**	**14,386**	**67,619**	**623,568**	**10%**	**508,370**
NET INCOME (LOSS):	**239,353**	**8,800**	**856,519**	**(617,166)**	**358%**	**657,058**

Washington State Bar Association

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For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
COMMUNICATION STRATEGIES						
REVENUE:						
50 YEAR MEMBER TRIBUTE LUNCH	100	-	873	(773)	873%	790
WSBA LOGO MERCHANDISE SALES	500	-	2,039	(1,539)	408%	1,622
TOTAL REVENUE:	**600**	**-**	**2,912**	**(2,312)**	**485%**	**2,412**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	5,895	379	2,084	3,811	35%	2,829
STAFF MEMBERSHIP DUES	1,800	220	987	813	55%	513
SUBSCRIPTIONS	4,000	64	1,611	2,389	40%	1,723
APEX	52,500	7,107	29,744	22,756	57%	14,006
BAR LEADERS SUMMIT	35,000	-	33,963	1,037	97%	(4,796)
50 YEAR MEMBER TRIBUTE LUNCH	35,000	740	28,724	6,276	82%	442
BAR OUTREACH	20,000	3,168	6,622	13,378	33%	10,044
COMMUNICATIONS OUTREACH	15,000	181	3,195	11,805	21%	9,305
STAFF CONFERENCE & TRAINING	11,100	-	8,761	2,339	79%	489
TOTAL DIRECT EXPENSES:	**180,295**	**11,860**	**115,691**	**64,604**	**64%**	**34,555**
INDIRECT EXPENSES:						
SALARY EXPENSE (5.39 FTE) **	426,569	34,232	322,126	104,443	76%	33,348
BENEFITS EXPENSE **	154,335	11,166	119,042	35,294	77%	9,571
OTHER INDIRECT EXPENSE **	138,424	8,892	102,773	35,651	74%	12,580
TOTAL INDIRECT EXPENSES:	**719,328**	**54,290**	**543,941**	**175,387**	**76%**	**55,499**
TOTAL ALL EXPENSES:	**899,623**	**66,150**	**659,632**	**239,991**	**73%**	**90,054**
NET INCOME (LOSS):	**(899,023)**	**(66,150)**	**(656,720)**	**(242,303)**	**73%**	**92,466**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

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For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
COMMUNICATION STRATEGIES FTE						
INDIRECT EXPENSES:						
SALARY EXPENSE (1.00 FTE)	179,737	14,978	155,318	24,419	86%	(5,537)
BENEFITS EXPENSE	45,265	3,251	38,419	6,846	85%	(698)
OTHER INDIRECT EXPENSE	25,492	1,657	19,129	6,363	75%	2,114
TOTAL INDIRECT EXPENSES:	**250,494**	**19,885**	**212,866**	**37,628**	**85%**	**(4,121)**
NET INCOME (LOSS):	**(250,494)**	**(19,885)**	**(212,866)**	**(37,628)**	**85%**	**(4,121)**

Washington State Bar Association

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83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DESKBOOKS						
REVENUE:						
DESKBOOK SALES	30,000	-	8,124	21,876	27%	(16,876)
LEXIS/NEXIS ROYALTIES	75,000	-	32,457	42,543	43%	(30,043)
SECTION PUBLICATION SALES	1,000	-	90	910	9%	(743)
FASTCASE ROYALTIES	25,000	-	17,350	7,651	69%	(3,484)
TOTAL REVENUE:	**131,000**	**-**	**58,021**	**72,979**	**44%**	**(51,146)**
DIRECT EXPENSES:						
COST OF SALES - DESKBOOKS	5,000	(1)	1,161	3,839	23%	3,006
COST OF SALES - SECTION PUBLICATION	500	-	74	426	15%	343
SPLITS TO SECTIONS	300	-	-	300	0%	250
DESKBOOK ROYALTIES	300	-	-	300	0%	250
POSTAGE & DELIVER-DESKBOOKS	300	-	-	300	0%	250
OBSOLETE INVENTORY	48,250	48,179	48,179	71	100%	(7,970)
STAFF MEMBERSHIP DUES	250	285	285	(35)	114%	(77)
SUBSCRIPTIONS	50	-	-	50	0%	42
TOTAL DIRECT EXPENSES:	**54,950**	**48,462**	**49,698**	**5,252**	**90%**	**(3,906)**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.75 FTE)	178,087	11,744	157,463	20,625	88%	(9,057)
BENEFITS EXPENSE	56,847	3,722	44,715	12,133	79%	2,658
OTHER INDIRECT EXPENSE	44,611	2,899	33,476	11,135	75%	3,700
TOTAL INDIRECT EXPENSES:	**279,545**	**18,365**	**235,653**	**43,892**	**84%**	**(2,699)**
TOTAL ALL EXPENSES:	**334,495**	**66,827**	**285,351**	**49,144**	**85%**	**(6,605)**
NET INCOME (LOSS):	**(203,495)**	**(66,827)**	**(227,330)**	**23,835**	**112%**	**(57,751)**

Washington State Bar Association

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83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DISCIPLINE						
REVENUE:						
AUDIT REVENUE	1,000	64	616	384	62%	(217)
RECOVERY OF DISCIPLINE COSTS	70,000	6,897	45,108	24,892	64%	(13,225)
DISCIPLINE HISTORY SUMMARY	19,000	1,740	17,668	1,332	93%	1,835
TOTAL REVENUE:	**90,000**	**8,701**	**63,392**	**26,608**	**70%**	**(11,608)**
DIRECT EXPENSES:						
PUBLICATIONS PRODUCTION	350	-	-	350	0%	292
STAFF TRAVEL/PARKING	25,000	839	8,726	16,274	35%	12,107
STAFF MEMBERSHIP DUES	7,090	-	6,840	250	96%	(932)
TELEPHONE	4,000	196	1,900	2,100	47%	1,433
COURT REPORTERS	60,000	7,959	40,316	19,684	67%	9,684
OUTSIDE COUNSEL/AIC	1,000	-	-	1,000	0%	833
LITIGATION EXPENSES	40,000	1,515	9,797	30,203	24%	23,536
DISABILITY EXPENSES	15,000	-	7,763	7,237	52%	4,737
TRANSLATION SERVICES	12,000	-	3,795	8,205	32%	6,205
STAFF CONFERENCE & TRAINING	37,345	1,598	23,936	13,409	64%	7,185
TOTAL DIRECT EXPENSES:	**201,785**	**12,108**	**103,074**	**98,711**	**51%**	**65,081**
INDIRECT EXPENSES:						
SALARY EXPENSE (38.90 FTE)	4,053,832	334,496	3,293,024	760,808	81%	85,170
BENEFITS EXPENSE	1,272,455	92,145	1,019,818	252,637	80%	40,561
OTHER INDIRECT EXPENSE	992,908	64,245	743,036	249,872	75%	84,387
TOTAL INDIRECT EXPENSES:	**6,319,195**	**490,886**	**5,055,878**	**1,263,317**	**80%**	**210,118**
TOTAL ALL EXPENSES:	**6,520,980**	**502,993**	**5,158,951**	**1,362,029**	**79%**	**275,199**
NET INCOME (LOSS):	**(6,430,980)**	**(494,292)**	**(5,095,559)**	**(1,335,421)**	**79%**	**263,591**

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83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
DIVERSITY						
REVENUE:						
DONATIONS	135,000	-	135,000	0	100%	22,500
TOTAL REVENUE:	**135,000**	**-**	**135,000**	**0**	**100%**	**22,500**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,700	42	778	2,922	21%	2,305
STAFF MEMBERSHIP DUES	700	-	655	45	94%	(72)
DEI COUNCIL	5,900	206	2,129	3,771	36%	2,787
DIVERSITY EVENTS & PROJECTS	43,100	-	8,708	34,392	20%	27,209
INTERNAL DIVERSITY OUTREACH	7,500	-	-	7,500	0%	6,250
STAFF CONFERENCE & TRAINING	3,000	-	162	2,838	5%	2,338
CONSULTING SERVICES	7,000	-	45	6,955	1%	5,788
TOTAL DIRECT EXPENSE:	**70,900**	**248**	**12,477**	**58,423**	**18%**	**46,606**
INDIRECT EXPENSES:						
SALARY EXPENSE (2.69 FTE)	227,749	12,865	174,136	53,613	76%	15,655
BENEFITS EXPENSE	79,569	4,994	61,906	17,662	78%	4,401
OTHER INDIRECT EXPENSE	68,573	4,434	51,198	17,375	75%	5,946
TOTAL INDIRECT EXPENSES:	**375,891**	**22,293**	**287,241**	**88,650**	**76%**	**26,001**
TOTAL ALL EXPENSES:	**446,791**	**22,541**	**299,718**	**147,073**	**67%**	**72,607**
NET INCOME (LOSS):	**(311,791)**	**(22,541)**	**(164,719)**	**(147,072)**	**53%**	**95,107**

Washington State Bar Association

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83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
ETHICS, WELLNESS, & PRACTICE						
(MWP-PMA-PRP)						
REVENUE:						
DIVERSIONS	10,000	-	1,500	8,500	15%	(6,833)
ROYALTIES	62,000	4,884	55,654	6,346	90%	3,988
TOTAL REVENUE:	**72,000**	**4,884**	**57,154**	**14,846**	**79%**	**(2,846)**
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	1,450	-	1,053	397	73%	155
MEMBER WELLNESS COUNCIL	4,250	-	1,042	3,208	25%	2,500
LEGAL TECH TASK FORCE	5,000	-	2,750	2,250	55%	1,417
STAFF TRAVEL/PARKING	6,000	99	1,168	4,832	19%	3,832
STAFF CONFERENCE & TRAINING	9,100	(216)	4,530	4,570	50%	3,054
SUBSCRIPTIONS	1,455	110	1,104	352	76%	109
CPE COMMITTEE	1,000	-	286	714	29%	547
FASTCASE	85,000	-	84,568	432	99%	(13,735)
TOTAL DIRECT EXPENSES:	**113,255**	**(6)**	**96,501**	**16,754**	**85%**	**(2,122)**
INDIRECT EXPENSES:						
SALARY EXPENSE (3.51 FTE)	376,056	31,412	316,100	59,956	84%	(2,720)
BENEFITS EXPENSE	117,836	8,506	95,332	22,504	81%	2,865
OTHER INDIRECT EXPENSE	89,476	5,774	66,670	22,806	75%	7,893
TOTAL INDIRECT EXPENSES:	**583,369**	**45,692**	**478,102**	**105,267**	**82%**	**8,039**
TOTAL ALL EXPENSES:	**696,624**	**45,686**	**574,603**	**122,021**	**82%**	**5,917**
NET INCOME (LOSS):	**(624,624)**	**(40,802)**	**(517,449)**	**(107,175)**	**83%**	**3,071**

Washington State Bar Association

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83% OF YEAR COMPLETE

FINANCE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
INTEREST INCOME	600,000	82,850	722,432	(122,432)	120%	222,432
TOTAL REVENUE:	**600,000**	**82,850**	**722,432**	**(122,432)**	**120%**	**222,432**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,750	18	2,794	956	75%	331
STAFF CONFERENCE & TRAINING	500	-	303	197	61%	113
STAFF MEMBERSHIP DUES	670	350	350	320	52%	208
TOTAL DIRECT EXPENSES:	**4,920**	**368**	**3,448**	**1,472**	**70%**	**652**
INDIRECT EXPENSES:						
SALARY EXPENSE (6.92 FTE)	751,265	60,993	647,529	103,736	86%	(21,475)
BENEFITS EXPENSE	232,396	16,669	191,506	40,890	82%	2,157
OTHER INDIRECT EXPENSE	176,403	11,426	131,934	44,469	75%	15,069
TOTAL INDIRECT EXPENSES:	**1,160,064**	**89,088**	**970,969**	**189,095**	**84%**	**(4,249)**
TOTAL ALL EXPENSES:	**1,164,984**	**89,456**	**974,416**	**190,568**	**84%**	**(3,596)**
NET INCOME (LOSS):	**(564,984)**	**(6,606)**	**(251,985)**	**(312,999)**	**45%**	**218,835**

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	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
FOUNDATION						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	3,200	-	3,200	-	100%	(533)
PRINTING & COPYING	1,000	-	7	993	1%	826
STAFF TRAVEL/PARKING	3,000	-	54	2,946	2%	2,446
SUPPLIES	2,000	-	103	1,897	5%	1,563
BOARD OF TRUSTEES	3,600	-	517	3,083	14%	2,483
EQUIPMENT/HARDWARE/SOFTWARE	2,400	220	2,196	204	92%	(196)
POSTAGE	400	-	-	400	0%	333
STAFF CONFERENCE & TRAINING	2,200	-	-	2,200	0%	1,833
TOTAL DIRECT EXPENSES:	**17,800**	**220**	**6,078**	**11,722**	**34%**	**8,756**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.05 FTE)	106,460	8,978	88,933	17,527	84%	(217)
BENEFITS EXPENSE	34,056	2,484	27,663	6,393	81%	717
OTHER INDIRECT EXPENSE	26,766	1,730	19,973	6,793	75%	2,332
TOTAL INDIRECT EXPENSES:	**167,282**	**13,192**	**136,569**	**30,713**	**82%**	**2,833**
TOTAL ALL EXPENSES:	**185,082**	**13,412**	**142,647**	**42,435**	**77%**	**11,588**
NET INCOME (LOSS):	**(185,082)**	**(13,412)**	**(142,647)**	**(42,435)**	**77%**	**11,588**

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	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
HUMAN RESOURCES						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	300	-	97	203	32%	153
STAFF MEMBERSHIP DUES	1,000	-	528	472	53%	305
SUBSCRIPTIONS	2,000	-	993	1,007	50%	674
STAFF TRAINING- GENERAL	36,800	795	1,721	35,079	5%	28,946
RECRUITING AND ADVERTISING	8,000	60	4,743	3,257	59%	1,924
PAYROLL PROCESSING	50,000	3,443	42,524	7,476	85%	(857)
SALARY SURVEYS	1,000	-	-	1,000	0%	833
CONSULTING SERVICES	10,000	-	-	10,000	0%	8,333
STAFF CONFERENCE & TRAINING	2,200	10	207	1,993	9%	1,626
TRANSFER TO INDIRECT EXPENSE	(111,300)	(4,308)	(50,813)	(60,487)	46%	(41,937)
TOTAL DIRECT EXPENSES:	-	-	-	-		-
INDIRECT EXPENSES:						
SALARY EXPENSE (4.00 FTE) **	595,894	35,318	445,191	150,702	75%	51,387
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(166,667)
BENEFITS EXPENSE	115,845	9,637	115,532	313	100%	(18,994)
OTHER INDIRECT EXPENSE	101,967	6,602	76,235	25,733	75%	8,738
TOTAL INDIRECT EXPENSES:	**613,706**	**51,557**	**636,957**	**(23,252)**	**104%**	**(125,536)**
TOTAL ALL EXPENSES:	**613,706**	**51,557**	**636,957**	**(23,252)**	**104%**	**(125,536)**
NET INCOME (LOSS):	**(613,706)**	**(51,557)**	**(636,957)**	**23,252**	**104%**	**(125,536)**

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83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LAW CLERK PROGRAM						
REVENUE:						
LAW CLERK FEES	234,000	(1,833)	243,493	(9,493)	104%	48,493
LAW CLERK APPLICATION FEES	3,200	300	4,200	(1,000)	131%	1,533
TOTAL REVENUE:	**237,200**	**(1,533)**	**247,693**	**(10,493)**	**104%**	**50,026**
DIRECT EXPENSES:						
SUBSCRIPTIONS	250	-	-	250	0%	208
DEPRECIATION	12,000	2,488	4,976	7,024	41%	5,024
CHARACTER & FITNESS INVESTIGATIONS	100	-	-	100	0%	83
LAW CLERK BOARD EXPENSE	8,000	1,241	4,817	3,183	60%	1,850
SOFTWARE HOSTING	681	64	571	110	84%	(4)
LAW CLERK OUTREACH	30,000	425	749	29,251	2%	24,251
TOTAL DIRECT EXPENSES:	**51,031**	**4,218**	**11,113**	**39,918**	**22%**	**31,412**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.23 FTE)	113,225	9,687	95,814	17,411	85%	(1,460)
BENEFITS EXPENSE	38,208	2,799	30,471	7,737	80%	1,369
OTHER INDIRECT EXPENSE	31,355	2,022	23,349	8,006	74%	2,780
TOTAL INDIRECT EXPENSES:	**182,789**	**14,508**	**149,635**	**33,154**	**82%**	**2,689**
TOTAL ALL EXPENSES:	**233,820**	**18,726**	**160,748**	**73,072**	**69%**	**34,102**
NET INCOME (LOSS):	**3,380**	**(20,259)**	**86,945**	**(83,564)**	**2572%**	**84,128**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LEGISLATIVE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	2,500	-	565	1,935	23%	1,519
STAFF MEMBERSHIP DUES	200	-	-	200	0%	167
JUD RECOMMEND COMMITTEE	2,250	-	1,675	575	74%	200
SUBSCRIPTIONS	2,000	-	1,986	14	99%	(320)
TELEPHONE	575	48	481	94	84%	(1)
CONTRACT LOBBYIST	15,000	-	15,000	-	100%	(2,500)
LEGISLATIVE REVIEW COMMITTEE	1,250	-	130	1,120	10%	912
BOG LEGISLATIVE COMMITTEE	300	-	-	300	0%	250
STAFF CONFERENCE & TRAINING	2,200	-	2,101	99	95%	(267)
TOTAL DIRECT EXPENSES:	**26,275**	**48**	**21,936**	**4,339**	**83%**	**(41)**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.70 FTE)	160,438	13,473	135,333	25,105	84%	(1,635)
BENEFITS EXPENSE	53,043	3,883	43,092	9,951	81%	1,110
OTHER INDIRECT EXPENSE	43,336	2,802	32,350	10,986	75%	3,763
TOTAL INDIRECT EXPENSES:	**256,817**	**20,158**	**210,775**	**46,041**	**82%**	**3,239**
TOTAL ALL EXPENSES:	**283,092**	**20,206**	**232,712**	**50,380**	**82%**	**3,198**
NET INCOME (LOSS):	**(283,092)**	**(20,206)**	**(232,712)**	**(50,380)**	**82%**	**3,198**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
LICENSING & MEMBERSHIP RECORDS						
REVENUE:						
STATUS CERTIFICATE FEES	27,000	2,750	26,250	750	97%	3,750
INVESTIGATION FEES	25,000	1,600	21,500	3,500	86%	667
PRO HAC VICE **	425,000	41,678	390,600	34,400	92%	36,433
MEMBER CONTACT INFORMATION	5,000	-	4,448	552	89%	281
PHOTO BAR CARD SALES	200	72	540	(340)	270%	373
TOTAL REVENUE:	**482,200**	**46,100**	**443,338**	**38,862**	**92%**	**41,505**
DIRECT EXPENSES:						
POSTAGE	4,000	-	3,725	275	93%	(392)
CONSULTING SERVICES	6,000	-	6,000	-	100%	(1,000)
SOFTWARE HOSTING	18,380	1,721	15,369	3,011	84%	(52)
TOTAL DIRECT EXPENSES:	**28,380**	**1,721**	**25,094**	**3,286**	**88%**	**(1,444)**
INDIRECT EXPENSES:						
SALARY EXPENSE (4.83 FTE)	515,705	40,427	427,091	88,614	83%	2,663
BENEFITS EXPENSE	158,553	11,334	128,097	30,457	81%	4,031
OTHER INDIRECT EXPENSE	123,125	7,967	91,988	31,137	75%	10,616
TOTAL INDIRECT EXPENSES:	**797,383**	**59,727**	**647,176**	**150,208**	**81%**	**17,310**
TOTAL ALL EXPENSES:	**825,763**	**61,449**	**672,269**	**153,494**	**81%**	**15,867**
NET INCOME (LOSS):	**(343,563)**	**(15,349)**	**(228,931)**	**(114,632)**	**67%**	**57,372**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

LIMITED LICENSE LEGAL TECHNICIAN PROGRAM

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
SEMINAR REGISTRATIONS	7,000	-	5,600	1,400	80%	(233)
LLLT LICENSE FEES	17,731	1,369	13,440	4,291	76%	(1,336)
LLLT LATE LICENSE FEES	-	-	365	(365)		365
MCLE LATE FEES	300	-	-	300	0%	(250)
TOTAL REVENUE:	**25,031**	**1,369**	**19,404**	**5,627**	**78%**	**(1,455)**
DIRECT EXPENSES:						
LLLT BOARD	11,500	121	2,702	8,798	23%	6,881
LLLT EDUCATION	1,000	-	35	965	4%	798
TOTAL DIRECT EXPENSES:	**12,500**	**121**	**2,737**	**9,763**	**22%**	**7,679**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.48 FTE)	55,689	3,855	46,988	8,701	84%	(580)
BENEFITS EXPENSE	17,525	1,113	14,644	2,882	84%	(39)
OTHER INDIRECT EXPENSE	14,536	804	11,385	3,152	78%	729
TOTAL INDIRECT EXPENSES:	**87,751**	**5,772**	**73,016**	**14,735**	**83%**	**110**
TOTAL ALL EXPENSES:	**100,251**	**5,894**	**75,754**	**24,498**	**76%**	**7,789**
NET INCOME (LOSS):	**(75,220)**	**(4,525)**	**(56,349)**	**(18,871)**	**75%**	**6,334**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

LIMITED PRACTICE OFFICERS

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
INVESTIGATION FEES	300	-	800	(500)	267%	550
MCLE LATE FEES	4,000	-	1,800	2,200	45%	(1,533)
LPO EXAMINATION FEES	23,000	-	14,700	8,300	64%	(4,467)
LPO LICENSE FEES	160,000	12,877	129,817	30,183	81%	(3,516)
LPO LATE LICENSE FEES	2,000	-	3,750	(1,750)	188%	2,083
TOTAL REVENUE:	**189,300**	**12,877**	**150,867**	**38,433**	**80%**	**(6,883)**
DIRECT EXPENSES:						
FACILITY, PARKING, FOOD	9,500	2,223	6,835	2,665	72%	1,082
EXAM WRITING	19,000	-	8,400	10,600	44%	7,433
LPO BOARD	4,000	-	586	3,414	15%	2,747
LPO OUTREACH	1,000	-	-	1,000	0%	833
PRINTING & COPYING	200	49	83	117	42%	83
SUPPLIES	200	-	-	200	0%	167
SOFTWARE HOSTING	3,404	319	2,847	557	84%	(10)
TOTAL DIRECT EXPENSES:	**37,304**	**2,590**	**18,751**	**18,553**	**50%**	**12,336**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.68 FTE)	66,043	5,480	55,107	10,935	83%	(72)
BENEFITS EXPENSE	21,528	1,570	17,005	4,523	79%	935
OTHER INDIRECT EXPENSE	17,590	1,121	13,115	4,475	75%	1,543
TOTAL INDIRECT EXPENSES:	**105,161**	**8,170**	**85,228**	**19,933**	**81%**	**2,406**
TOTAL ALL EXPENSES:	**142,465**	**10,761**	**103,978**	**38,486**	**73%**	**14,742**
NET INCOME (LOSS):	**46,835**	**2,117**	**46,889**	**(54)**	**100%**	**7,860**

Washington State Bar Association

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83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MANDATORY CONTINUING LEGAL EDUCATION						
REVENUE:						
ACTIVITY APPLICATION FEE	600,000	49,000	596,600	3,400	99%	96,600
ACTIVITY APPLICATION LATE FEE	220,000	17,350	233,400	(13,400)	106%	50,067
MCLE LATE FEES	225,000	1,950	254,750	(29,750)	113%	67,250
ANNUAL ACCREDITED SPONSOR FEES	39,000	-	39,750	(750)	102%	7,250
ATTENDANCE LATE FEES	120,000	8,700	87,650	32,350	73%	(12,350)
COMITY CERTIFICATES	29,800	700	32,775	(2,975)	110%	7,942
TOTAL REVENUE:	**1,233,800**	**77,700**	**1,244,925**	**(11,125)**	**101%**	**216,758**
DIRECT EXPENSES:						
DEPRECIATION	142,183	12,012	120,120	22,063	84%	(1,634)
STAFF MEMBERSHIP DUES	500	-	500	-	100%	(83)
MCLE BOARD	4,000	-	1,806	2,194	45%	1,527
STAFF TRAVEL/PARKING	50	-	-	50	0%	42
STAFF CONFERENCE & TRAINING	4,600	-	-	4,600	0%	3,833
TOTAL DIRECT EXPENSES:	**151,333**	**12,012**	**122,426**	**28,907**	**81%**	**3,684**
INDIRECT EXPENSES:						
SALARY EXPENSE (4.76 FTE)	400,391	29,091	336,566	63,825	84%	(2,907)
BENEFITS EXPENSE	136,403	9,717	110,602	25,801	81%	3,067
OTHER INDIRECT EXPENSE	121,596	7,869	91,038	30,559	75%	10,292
TOTAL INDIRECT EXPENSES:	**658,390**	**46,678**	**538,206**	**120,184**	**82%**	**10,452**
TOTAL ALL EXPENSES:	**809,723**	**58,690**	**660,632**	**149,091**	**82%**	**14,137**
NET INCOME (LOSS):	**424,077**	**19,010**	**584,293**	**(160,216)**	**138%**	**230,895**

Washington State Bar Association

Statement of Activities
For the Period from July 1, 2025 to July 31, 2025
83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
MEMBER SERVICES & ENGAGEMENT TEAM						
(LLB-MINI-MSE-NME)						
REVENUE:						
ROYALTIES	10,800	1,200	12,350	(1,550)	114%	3,350
NMP PRODUCT SALES	150,000	7,244	123,921	26,079	83%	(1,079)
DIGITAL VIDEO SALES	25,000	1,029	24,892	108	100%	4,059
SPONSORSHIPS	11,500	-	11,000	500	96%	1,417
SEMINAR REGISTRATIONS	16,000	-	20,142	(4,142)	126%	6,809
TRIAL ADVOCACY PROGRAM	15,000	1,057	13,344	1,657	89%	844
TOTAL REVENUE:	**228,300**	**10,530**	**205,648**	**22,652**	**90%**	**15,398**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,500	1,205	1,810	1,690	52%	1,107
STAFF CONFERENCE & TRAINING	2,200	-	1,825	375	83%	9
SMALL TOWN AND RURAL COMMITTEE	7,500	724	1,367	6,133	18%	4,883
PRINTING & COPYING	1,600	-	1,442	158	90%	(108)
DISABILITY ACCOMMODATIONS	2,000	-	-	2,000	0%	1,667
HONORARIUM	1,500	-	-	1,500	0%	1,250
SUBSCRIPTIONS	350	-	350	-	100%	(58)
YLL SECTION PROGRAM	1,300	-	585	715	45%	498
SMALL TOWN AND RURAL COMMITTEE OUTREACH AND ACTIVITIES	65,000	6,195	60,044	4,956	92%	(5,878)
ON24 OVERAGE CHARGE	4,500	-	4,414	86	98%	(664)
MEMBER ENGAGEMENT COUNCIL	500	-	-	500	0%	417
WYLC CLE COMPS	1,000	-	-	1,000	0%	833
WYLC OUTREACH EVENTS	5,000	1,288	4,807	193	96%	(641)
SPEAKERS & PROGRAM DEVELOP	100	-	-	100	0%	83
WYL COMMITTEE	15,000	-	778	14,222	5%	11,722
TRIAL ADVOCACY EXPENSES	2,025	1,145	2,432	(407)	120%	(745)
LAW LIBRARY DESKBOOK ACCESS	10,000	-	9,311	689	93%	(978)
LAW SCHOOL OUTREACH	500	-	-	500	0%	417
RECEPTION/FORUM EXPENSE	1,000	-	200	800	20%	633
INSURANCE REBATE	(3,375)	-	-	(3,375)	0%	(2,813)
STAFF MEMBERSHIP DUES	450	-	390	60	87%	(15)
LENDING LIBRARY	4,000	53	273	3,727	7%	3,060
NMP SPEAKERS & PROGRAM DEVELOPMENT	575	106	106	469	18%	373
TOTAL DIRECT EXPENSES:	**126,225**	**10,716**	**90,134**	**36,091**	**71%**	**15,053**
INDIRECT EXPENSES:						
SALARY EXPENSE (4.64 FTE)	333,094	27,952	263,451	69,643	79%	14,127
BENEFITS EXPENSE	126,899	9,401	100,097	26,801	79%	5,652
OTHER INDIRECT EXPENSE	118,282	7,650	88,331	29,951	75%	10,237
INSURANCE REBATE	(19,016)	-	-	(19,016)	0%	(15,847)
TOTAL INDIRECT EXPENSES:	**559,258**	**45,003**	**451,879**	**107,379**	**81%**	**14,169**
TOTAL ALL EXPENSES:	**685,483**	**55,719**	**542,013**	**143,470**	**79%**	**29,223**
NET INCOME (LOSS):	**(457,183)**	**(45,189)**	**(336,365)**	**(120,818)**	**74%**	**44,621**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
OFFICE OF THE EXECUTIVE DIRECTOR						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
LEADERSHIP TRAINING **	14,600	(69)	11,532	3,068	79%	634
WASHINGTON LEADERSHIP INSTITUTE	100,000	-	100,000	-	100%	(16,667)
ED TRAVEL & OUTREACH	6,000	482	2,874	3,126	48%	2,126
STAFF TRAVEL/PARKING	2,000	198	1,903	97	95%	(236)
STAFF CONFERENCE & TRAINING **	14,200	-	11,045	3,155	78%	788
STAFF MEMBERSHIP DUES	2,175	-	1,120	1,055	51%	693
TOTAL DIRECT EXPENSES:	**138,975**	**612**	**128,474**	**10,501**	**92%**	**(12,662)**
INDIRECT EXPENSES:						
SALARY EXPENSE (4.23 FTE) **	621,554	51,654	510,914	110,640	82%	7,047
BENEFITS EXPENSE **	161,527	12,155	136,818	24,709	85%	(2,212)
OTHER INDIRECT EXPENSE **	107,319	6,992	80,625	26,694	75%	8,807
TOTAL INDIRECT EXPENSES:	**890,399**	**70,802**	**728,356**	**162,043**	**82%**	**13,643**
TOTAL ALL EXPENSES:	**1,029,374**	**71,413**	**856,831**	**172,543**	**83%**	**981**
NET INCOME (LOSS):	**(1,029,374)**	**(71,413)**	**(856,831)**	**(172,543)**	**83%**	**981**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

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83% OF YEAR COMPLETE

OFFICE OF GENERAL COUNSEL

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
RECORDS REQUEST FEES	-	-	270	(270)		270
TOTAL REVENUE:	**-**	**-**	**270**	**(270)**		**270**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	3,500	619	3,163	337	90%	(247)
STAFF MEMBERSHIP DUES	2,090	-	1,825	265	87%	(83)
COURT RULES COMMITTEE	1,000	-	-	1,000	0%	833
COURT REPORTERS	-	-	(179)	179		179
CUSTODIANSHIPS	5,000	-	201	4,799	4%	3,966
WILLS	2,000	-	-	2,000	0%	1,667
LITIGATION EXPENSES	1,000	(96)	287	713	29%	546
DISABILITY ACCOMMODATIONS	6,000	-	667	5,333	11%	4,333
STAFF CONFERENCE & TRAINING	6,215	-	363	5,852	6%	4,816
SUPPLIES	-	-	104	(104)		(104)
TOTAL DIRECT EXPENSES:	**26,805**	**523**	**6,432**	**20,373**	**24%**	**15,906**
INDIRECT EXPENSES:						
SALARY EXPENSE (6.47 FTE) **	682,130	57,950	561,061	121,069	82%	7,381
BENEFITS EXPENSE	210,435	15,768	168,821	41,614	80%	6,542
OTHER INDIRECT EXPENSE	157,903	10,695	116,840	41,063	74%	14,746
TOTAL INDIRECT EXPENSES:	**1,050,467**	**84,413**	**846,721**	**203,746**	**81%**	**28,668**
TOTAL ALL EXPENSES:	**1,077,272**	**84,936**	**853,153**	**224,119**	**79%**	**44,574**
NET INCOME (LOSS):	**(1,077,272)**	**(84,936)**	**(852,883)**	**(224,389)**	**79%**	**44,844**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

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83% OF YEAR COMPLETE

OFFICE OF GENERAL COUNSEL - DISCIPLINARY BOARD

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSE:						
STAFF MEMBERSHIP DUES	100	-	-	100	0%	83
DISCIPLINARY BOARD EXPENSES	5,000	427	1,348	3,652	27%	2,818
CHIEF HEARING OFFICER	40,000	3,333	33,330	6,670	83%	3
COURT REPORTERS	25,000	-	19,004	5,996	76%	1,829
HEARING OFFICER EXPENSES	4,000	35	132	3,868	3%	3,201
HEARING OFFICER TRAINING	1,000	-	-	1,000	0%	833
APPOINTED COUNSEL	50,400	4,200	42,000	8,400	83%	-
DISCIPLINARY SELECTION PANEL	1,000	-	-	1,000	0%	833
STAFF CONFERENCE & TRAINING	2,000	-	-	2,000	0%	1,667
TOTAL DIRECT EXPENSES:	**128,500**	**7,995**	**95,815**	**32,685**	**75%**	**11,269**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.30 FTE)	125,704	10,447	107,632	18,072	86%	(2,879)
BENEFITS EXPENSE	41,128	2,995	33,672	7,456	82%	601
OTHER INDIRECT EXPENSE	33,139	2,144	24,755	8,384	75%	2,861
TOTAL INDIRECT EXPENSES:	**199,971**	**15,586**	**166,060**	**33,912**	**83%**	**583**
TOTAL ALL EXPENSES:	**328,471**	**23,581**	**261,874**	**66,597**	**80%**	**11,852**
NET INCOME (LOSS):	**(328,471)**	**(23,581)**	**(261,874)**	**(66,597)**	**80%**	**11,852**

Washington State Bar Association

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83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PRACTICE OF LAW BOARD						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
PRACTICE OF LAW BOARD	16,000	-	740	15,260	5%	12,593
TOTAL DIRECT EXPENSES:	**16,000**	**-**	**740**	**15,260**	**5%**	**12,593**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.35 FTE)	44,050	3,421	36,210	7,841	82%	499
BENEFITS EXPENSE	15,037	896	11,817	3,220	79%	714
OTHER INDIRECT EXPENSE	11,478	585	9,028	2,450	79%	537
TOTAL INDIRECT EXPENSES:	**70,566**	**4,902**	**57,055**	**13,510**	**81%**	**1,749**
TOTAL ALL EXPENSES:	**86,566**	**4,902**	**57,795**	**28,770**	**67%**	**14,343**
NET INCOME (LOSS):	**(86,566)**	**(4,902)**	**(57,795)**	**(28,770)**	**67%**	**14,343**

Washington State Bar Association

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83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PUBLIC SERVICE PROGRAMS						
REVENUE:						
DONATIONS & GRANTS	135,280	-	134,832	448	100%	22,098
TOTAL REVENUE:	**135,280**	**-**	**134,832**	**448**	**100%**	**22,098**
DIRECT EXPENSES:						
DONATIONS/SPONSORSHIPS/GRANTS	300,000	12,000	250,011	49,989	83%	(11)
STAFF TRAVEL/PARKING	2,000	12	154	1,846	8%	1,512
PRO BONO & PUBLIC SERVICE COMMITTEE	2,500	-	361	2,139	14%	1,723
STAFF CONFERENCE & TRAINING	2,200	-	775	1,425	35%	1,058
PRO BONO OUTREACH	4,000	86	1,187	2,813	30%	2,146
TOTAL DIRECT EXPENSES:	**310,700**	**12,098**	**252,488**	**58,212**	**81%**	**6,429**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.62 FTE)	136,915	11,572	113,618	23,298	83%	479
BENEFITS EXPENSE	47,862	3,538	38,707	9,155	81%	1,178
OTHER INDIRECT EXPENSE	41,297	2,680	30,944	10,353	75%	3,470
TOTAL INDIRECT EXPENSES:	**226,074**	**17,790**	**183,269**	**42,805**	**81%**	**5,126**
TOTAL ALL EXPENSES:	**536,774**	**29,889**	**435,757**	**101,017**	**81%**	**11,555**
NET INCOME (LOSS):	**(401,494)**	**(29,889)**	**(300,925)**	**(100,569)**	**75%**	**33,653**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
PUBLICATION & DESIGN SERVICES						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
SUBSCRIPTIONS	200	-	88	112	44%	78
IMAGE LIBRARY	4,800	-	4,756	44	99%	(756)
TOTAL DIRECT EXPENSES:	**5,000**	**-**	**4,844**	**156**	**97%**	**(678)**
INDIRECT EXPENSES:						
SALARY EXPENSE (0.89 FTE)	76,345	6,729	68,549	7,795	90%	(4,929)
BENEFITS EXPENSE	26,506	1,988	22,097	4,409	83%	(9)
OTHER INDIRECT EXPENSE	22,688	1,462	16,878	5,809	74%	2,028
TOTAL INDIRECT EXPENSES:	**125,539**	**10,179**	**107,525**	**18,014**	**86%**	**(2,909)**
TOTAL ALL EXPENSES:	**130,539**	**10,179**	**112,369**	**18,169**	**86%**	**(3,587)**
NET INCOME (LOSS):	**(130,539)**	**(10,179)**	**(112,369)**	**(18,169)**	**86%**	**(3,587)**

Washington State Bar Association

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83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REGULATORY SERVICES FTE						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF MEMBERSHIP DUES	490	-	490	-	100%	(82)
STAFF CONFERENCE & TRAINING	8,400	-	932	7,468	11%	6,068
STAFF TRAVEL/PARKING	600	581	864	(264)	144%	(364)
TOTAL DIRECT EXPENSES:	**9,490**	**581**	**2,287**	**7,203**	**24%**	**5,703**
INDIRECT EXPENSES:						
SALARY EXPENSE (2.20 FTE)	299,450	24,916	251,861	47,589	84%	(2,319)
BENEFITS EXPENSE	84,363	6,054	68,945	15,418	82%	1,357
OTHER INDIRECT EXPENSE	56,721	3,630	42,616	14,105	75%	4,652
TOTAL INDIRECT EXPENSES:	**440,534**	**34,600**	**363,421**	**77,112**	**82%**	**3,690**
TOTAL ALL EXPENSES:	**450,024**	**35,181**	**365,708**	**84,316**	**81%**	**9,393**
NET INCOME (LOSS):	**(450,024)**	**(35,181)**	**(365,708)**	**(84,316)**	**81%**	**9,312**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

REGULATORY REFORM

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	72,500	-	10,311	62,189	14%	50,106
OUTREACH EXPENSES	10,000	-	-	10,000	0%	8,333
MEETING EXPENSE	-	-	2,098	(2,098)		(2,098)
TOTAL DIRECT EXPENSES:	**82,500**	**-**	**12,409**	**70,091**	**15%**	**-**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.80 FTE)	157,764	16,681	122,046	35,718	77%	9,424
BENEFITS EXPENSE	46,175	4,454	33,957	12,218	74%	4,522
OTHER INDIRECT EXPENSE	32,466	2,972	20,781	11,685	64%	6,274
TOTAL INDIRECT EXPENSES:	**236,405**	**24,106**	**176,783**	**59,622**	**75%**	**20,221**
TOTAL ALL EXPENSES:	**318,905**	**24,106**	**189,193**	**129,712**	**59%**	**20,221**
NET INCOME (LOSS):	**(318,905)**	**(24,106)**	**(189,193)**	**(129,712)**	**59%**	**76,561**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SERVICE CENTER						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	2,376	198	1,903	473	80%	77
STAFF CONFERENCE & TRAINING	677	-	-	677	0%	564
TOTAL DIRECT EXPENSES:	**3,053**	**198**	**1,903**	**1,150**	**62%**	**641**
INDIRECT EXPENSES:						
SALARY EXPENSE (5.78 FTE)	427,125	29,521	349,438	77,686	82%	6,499
BENEFITS EXPENSE	160,271	11,001	128,145	32,126	80%	5,414
OTHER INDIRECT EXPENSE	147,342	9,550	110,448	36,894	75%	12,337
TOTAL INDIRECT EXPENSES:	**734,738**	**50,072**	**588,032**	**146,707**	**80%**	**24,250**
TOTAL ALL EXPENSES:	**737,791**	**50,270**	**589,935**	**147,857**	**80%**	**24,892**
NET INCOME (LOSS):	**(737,791)**	**(50,270)**	**(589,935)**	**(147,857)**	**80%**	**24,892**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SECTIONS ADMINISTRATION						
REVENUE:						
REIMBURSEMENTS FROM SECTIONS	275,000	1,347	365,646	(90,646)	133%	136,479
TOTAL REVENUE:	**275,000**	**1,347**	**365,646**	**(90,646)**	**133%**	**136,479**
DIRECT EXPENSES:						
STAFF TRAVEL/PARKING	1,500	-	60	1,440	4%	1,190
SECTION/COMMITTEE CHAIR MTGS	700	-	89	611	13%	494
STAFF MEMBERSHIP DUES	200	-	60	140	30%	107
TOTAL DIRECT EXPENSES:	**2,400**	**-**	**209**	**2,191**	**9%**	**1,791**
INDIRECT EXPENSES:						
SALARY EXPENSE (2.53 FTE)	169,092	14,198	137,332	31,760	81%	3,578
BENEFITS EXPENSE	67,073	5,016	53,754	13,319	80%	2,140
OTHER INDIRECT EXPENSE	64,494	4,215	48,630	15,864	75%	5,115
TOTAL INDIRECT EXPENSES:	**300,658**	**23,428**	**239,715**	**60,943**	**80%**	**10,834**
TOTAL ALL EXPENSES:	**303,058**	**23,428**	**239,925**	**63,134**	**79%**	**12,624**
NET INCOME (LOSS):	**(28,058)**	**(22,081)**	**125,721**	**(153,780)**	**-448%**	**149,103**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
SECTIONS OPERATIONS						
REVENUE:						
SECTION DUES	438,280	2,195	573,176	(134,896)	131%	207,943
SEMINAR PROFIT SHARE	159,700	-	-	159,700	0%	(133,083)
INTEREST INCOME	2,050	-	-	2,050	0%	(1,708)
PUBLICATIONS REVENUE	1,250	-	2,279	(1,029)	182%	1,238
OTHER	44,203	3,535	34,365	9,838	78%	(2,471)
TOTAL REVENUE:	**645,483**	**5,730**	**609,821**	**35,663**	**94%**	**71,918**
DIRECT EXPENSES:						
DIRECT EXPENSES OF SECTION ACTIVITIES	759,773	40,342	288,438	471,335	38%	344,706
REIMBURSEMENT TO WSBA FOR INDIRECT EXPENSES	280,433	1,347	365,646	(85,213)	130%	(131,952)
TOTAL DIRECT EXPENSES:	**1,040,206**	**41,689**	**654,084**	**386,122**	**63%**	**212,754**
NET INCOME (LOSS):	**(394,722)**	**(35,959)**	**(44,264)**	**(350,459)**	**11%**	**284,672**

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
TECHNOLOGY						
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
CONSULTING SERVICES	140,000	25,552	137,129	2,871	98%	(20,463)
STAFF TRAVEL/PARKING	1,000	258	1,245	(245)	125%	(412)
STAFF MEMBERSHIP DUES	300	-	-	300	0%	250
TELEPHONE	90,000	14,698	78,203	11,797	87%	(3,203)
COMPUTER HARDWARE	66,200	1,637	63,089	3,111	95%	(7,922)
COMPUTER SOFTWARE	530,000	473	298,395	231,605	56%	143,272
HARDWARE SERVICE & WARRANTIES	50,000	-	39,585	10,415	79%	2,082
SOFTWARE MAINTENANCE & LICENSING	400,000	1,951	356,565	43,435	89%	(23,231)
THIRD PARTY SERVICES	65,000	16,624	68,380	(3,380)	105%	(14,213)
CLOUD INFRASTRUCTURE	130,000	4,234	47,541	82,459	37%	60,792
STAFF CONFERENCE & TRAINING	6,000	-	1,091	4,909	18%	3,909
TRANSFER TO INDIRECT EXPENSES	(1,478,500)	(65,428)	(1,091,222)	(387,278)	74%	(140,862)
TOTAL DIRECT EXPENSES:	-	-	-	-		-
INDIRECT EXPENSES:						
SALARY EXPENSE (12.00 FTE) **	1,422,045	207,491	1,260,322	161,723	89%	(75,284)
BENEFITS EXPENSE **	421,171	35,820	325,237	95,934	77%	25,739
CAPITAL LABOR & OVERHEAD	(75,000)	-	(104,685)	29,685	140%	(42,185)
OTHER INDIRECT EXPENSE	305,901	19,856	229,266	76,635	75%	25,652
TOTAL INDIRECT EXPENSES:	**2,074,118**	**263,167**	**1,710,141**	**363,977**	**82%**	**(66,078)**
TOTAL ALL EXPENSES:	**2,074,118**	**263,167**	**1,710,141**	**363,977**	**82%**	**(66,078)**
NET INCOME (LOSS):	**(2,074,118)**	**(263,167)**	**(1,710,141)**	**(363,977)**	**82%**	**18,291**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

Statement of Activities

For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

VOLUNTEER ENGAGEMENT

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
REVENUE:						
TOTAL REVENUE:	-	-	-	-		-
DIRECT EXPENSES:						
POSTAGE	600	-	468	132	78%	32
STAFF MEMBERSHIP DUES	450	-	300	150	67%	75
STAFF CONFERENCE & TRAINING	5,200	-	3,554	1,646	68%	779
SUBSCRIPTIONS	816	-	716	100	88%	(36)
VOLUNTEER RECOGNITION	2,000	-	39	1,961	2%	1,628
REGULATORY SCHOOL	12,000	-	7,767	4,233	65%	2,233
ABA DELEGATES	16,000	-	5,360	10,640	34%	7,973
TOTAL DIRECT EXPENSES:	**37,066**	**-**	**18,205**	**18,861**	**49%**	**12,684**
INDIRECT EXPENSES:						
SALARY EXPENSE (1.20 FTE)	127,293	8,909	98,318	28,975	77%	7,759
BENEFITS EXPENSE	43,900	2,675	34,800	9,100	79%	1,783
OTHER INDIRECT EXPENSE	36,980	1,998	29,022	7,959	78%	1,795
TOTAL INDIRECT EXPENSES:	**208,173**	**13,582**	**162,140**	**46,033**	**78%**	**11,338**
TOTAL ALL EXPENSES:	**245,239**	**13,582**	**180,345**	**64,895**	**74%**	**11,338**
NET INCOME (LOSS):	**(245,239)**	**(13,582)**	**(180,345)**	**(64,895)**	**74%**	**24,022**

Washington State Bar Association

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For the Period from July 1, 2025 to July 31, 2025

83% OF YEAR COMPLETE

	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF REFORECAST	YEAR TO DATE VARIANCE FAVORABLE/(UNFAVORABLE)
INDIRECT EXPENSES:						
SALARIES	14,691,362	1,228,570	11,933,434	2,757,928	81%	309,367
TEMPORARY SALARIES	271,788	25,365	373,688	(101,900)	137%	(147,198)
CAPITAL LABOR & OVERHEAD	(75,000)	-	(104,685)	29,685	140%	42,185
ALLOWANCE FOR OPEN POSITIONS	(200,000)	-	-	(200,000)	0%	(166,667)
INSURANCE REBATE	(19,016)	-	-	(19,016)	0%	(15,847)
SEVERANCE PAY	-	37,505	37,505	(37,505)		(37,505)
EMPLOYEE ASSISTANCE PLAN	4,800	-	3,600	1,200	75%	400
EMPLOYEE SERVICE AWARDS	2,610	160	1,950	660	75%	225
FICA (EMPLOYER PORTION)	1,112,598	95,733	894,443	218,156	80%	32,723
L&I INSURANCE	72,487	-	44,295	28,192	61%	16,110
WA STATE FAMILY MEDICAL LEAVE (EMPLOYI	33,236	3,348	29,439	3,796	89%	(1,743)
MEDICAL (EMPLOYER PORTION)	2,057,482	177,237	1,723,417	334,065	84%	(8,848)
RETIREMENT (EMPLOYER PORTION)	1,322,122	63,923	1,015,870	306,252	77%	85,898
TRANSPORTATION ALLOWANCE	34,000	361	24,904	9,096	73%	3,429
UNEMPLOYMENT INSURANCE	71,847	6,049	60,797	11,050	85%	(925)
TOTAL SALARY & BENEFITS EXPENSE:	**19,380,315**	**1,638,250**	**16,038,657**	**3,341,659**	**83%**	**111,606**
WORKPLACE BENEFITS	56,400	26,808	39,841	16,559	71%	7,159
HUMAN RESOURCES POOLED EXP	111,300	4,308	50,813	60,487	46%	41,937
MEETING SUPPORT EXPENSES	9,950	102	7,338	2,612	74%	954
RENT	960,000	75,299	814,887	145,113	85%	(14,887)
MOVE / DOWNSIZE EXPENSES	28,208	-	24,906	3,302	88%	(1,399)
PERSONAL PROP TAXES-WSBA	8,400	619	5,953	2,447	71%	1,047
FURNITURE, MAINT, LH IMP **	65,497	2,285	43,838	21,659	67%	10,743
OFFICE SUPPLIES & EQUIPMENT	22,164	1,385	13,175	8,989	59%	5,295
FURN & OFFICE EQUIP DEPRECIATION	159,628	18,707	104,478	55,150	65%	28,545
COMPUTER HARDWARE DEPRECIATION **	42,000	4,747	36,890	5,110	88%	(1,890)
COMPUTER SOFTWARE DEPRECIATION	49,339	3,718	39,957	9,382	81%	1,159
INSURANCE	288,200	21,920	217,311	70,889	75%	22,856
WORK HOME FURNITURE & EQUIP	14,000	-	1,842	12,158	13%	9,825
PROFESSIONAL FEES-AUDIT	41,000	-	36,577	4,423	89%	(2,410)
PROFESSIONAL FEES-LEGAL	200,000	6,493	129,759	70,241	65%	36,907
ONLINE LEGAL RESEARCH	86,000	6,497	71,118	14,883	83%	549
ACCOMODATIONS FUND	6,500	-	-	6,500	0%	5,417
TRANSLATION SERVICES	12,000	675	5,186	6,814	43%	4,814
TELEPHONE & INTERNET	33,600	2,720	27,380	6,220	81%	620
POSTAGE - GENERAL	15,500	501	6,478	9,022	42%	6,439
RECORDS STORAGE	28,849	419	27,774	1,075	96%	(3,733)
BANK FEES	30,000	740	3,940	26,060	13%	21,060
PRODUCTION MAINTENANCE & SUPPLIES	13,000	259	11,027	1,973	85%	(193)
COMPUTER POOLED EXPENSES	1,478,500	65,428	1,091,222	387,278	74%	140,862
GAIN (LOSS) ASSETS	-	-	1,396	(1,396)		(1,396)
TOTAL OTHER INDIRECT EXPENSES:	**3,760,035**	**243,628**	**2,813,084**	**946,951**	**75%**	**320,279**
TOTAL INDIRECT EXPENSES:	**23,140,350**	**1,881,878**	**18,851,740**	**4,288,610**	**81%**	**431,885**

**Budget reallocations apply to this line item. For details, see FY25 Budget Reallocations memo(s) included in the Board of Governors meeting materials.

Washington State Bar Association

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83% OF YEAR COMPLETE

SUMMARY PAGE	FISCAL 2025 REFORECAST	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE
ACCESS TO JUSTICE	(389,284)	(4,850)	(295,410)	(93,874)
ADMISSIONS/BAR EXAM	115,136	(131,072)	530,090	(414,954)
ADVANCEMENT FTE	(392,492)	(33,807)	(320,428)	(72,064)
BAR NEWS	(140,492)	(3,318)	(78,280)	(62,212)
BOARD OF GOVERNORS	(584,797)	(48,380)	(407,888)	(176,909)
CLE - PRODUCTS	616,909	86,895	624,849	(7,940)
CLE - SEMINARS	(543,860)	(44,887)	(384,282)	(159,577)
CLIENT PROTECTION FUND	239,353	8,800	856,519	(617,166)
CHARACTER & FITNESS BOARD	(175,016)	(16,113)	(132,902)	(42,114)
COMMUNICATIONS	(899,023)	(66,150)	(656,720)	(242,303)
COMMUNICATIONS FTE	(250,494)	(19,885)	(212,866)	(37,628)
DESKBOOKS	(203,495)	(66,827)	(227,330)	23,835
DISCIPLINE	(6,430,980)	(494,292)	(5,095,559)	(1,335,421)
DIVERSITY	(311,791)	(22,541)	(164,719)	(147,072)
FINANCE	(564,984)	(6,606)	(251,985)	(312,999)
FOUNDATION	(185,082)	(13,412)	(142,647)	(42,435)
HUMAN RESOURCES	(613,706)	(51,557)	(636,957)	23,252
LAW CLERK PROGRAM	3,380	(20,259)	86,945	(83,564)
LEGISLATIVE	(283,092)	(20,206)	(232,712)	(50,380)
LEGAL LUNCHBOX	(5,554)	(3,240)	(14,199)	8,645
LICENSE FEES	17,492,616	1,413,033	14,486,567	3,006,049
LICENSING AND MEMBERSHIP	(343,563)	(15,349)	(228,931)	(114,632)
LIMITED LICENSE LEGAL TECHNICIAN	(75,220)	(4,525)	(56,349)	(18,871)
LIMITED PRACTICE OFFICERS	46,835	2,117	46,889	(54)
MANDATORY CLE ADMINISTRATION	424,077	19,010	584,293	(160,216)
MEMBER WELLNESS PROGRAM	(231,844)	(18,241)	(189,765)	(42,079)
MINI CLE	(120,867)	(9,645)	(99,058)	(21,809)
MEMBER SERVICES & ENGAGEMENT	(398,049)	(30,835)	(288,794)	(109,255)
NEW MEMBER EDUCATION	67,287	(1,469)	65,701	1,586
OFFICE OF GENERAL COUNSEL	(1,077,272)	(84,936)	(852,883)	(224,389)
OFFICE OF THE EXECUTIVE DIRECTOR	(1,029,374)	(71,413)	(856,831)	(172,543)
OGC-DISCIPLINARY BOARD	(328,471)	(23,581)	(261,874)	(66,597)
PRACTICE OF LAW BOARD	(86,566)	(4,902)	(57,795)	(28,770)
PRACTICE MANAGEMENT ASSISTANCE	(175,060)	(6,235)	(151,683)	(23,377)
PROFESSIONAL RESPONSIBILITY PROGRAM	(217,719)	(16,326)	(176,001)	(41,719)
PUBLIC SERVICE PROGRAMS	(401,494)	(29,889)	(300,925)	(100,569)
PUBLICATION & DESIGN SERVICES	(130,539)	(10,179)	(112,369)	(18,169)
REGULATORY SERVICES FTE	(450,024)	(35,181)	(365,708)	(84,316)
REGULATORY REFORM	(318,905)	(24,106)	(189,193)	(129,712)
SECTIONS ADMINISTRATION	(28,058)	(22,081)	125,721	(153,780)
SECTIONS OPERATIONS	(394,722)	(35,959)	(44,264)	(350,459)
SERVICE CENTER	(737,791)	(50,270)	(589,935)	(147,857)
TECHNOLOGY	(2,074,118)	(263,167)	(1,710,141)	(363,977)
VOLUNTEER EDUCATION	(245,239)	(13,582)	(180,345)	(64,895)
INDIRECT EXPENSES	23,140,350	1,881,878	18,851,740	4,288,610
TOTAL OF ALL	**(21,306,907)**	**(1,572,460)**	**(20,291,588)**	**(1,015,318)**
NET INCOME (LOSS)	**(1,833,444)**	**(309,417)**	**1,439,848**	**(3,273,292)**

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: 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 **Promoting the Role of Legal Professionals in Society** • Service • Professionalism	• 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? • 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;

(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

2025-2026 WSBA BOARD OF GOVERNORS MEETING SCHEDULE

MEETING DATE	LOCATION	DESCRIPTION	EXECUTIVE COMMITTEE MEETING	MATERIALS DEADLINE
October 24-25, 2025	Icicle Village Resort Leavenworth, WA	Team Building Retreat		n/a
November 14-15, 2025	WSBA Conference Center Seattle, WA	BOG Meeting	October 22, 2025	October 14, 2025
January 16-17, 2026	WSBA Conference Center Seattle, WA	BOG Meeting KCBA MLK Luncheon Jan. 16	December 18, 2025	December 9, 2025
March 6-7, 2026	Great Wolf Lodge, Grand Mound, WA	BOG Meeting	February 19, 2026	February 10, 2026
May 1-2, 2026	Wenatchee Convention Center Wenatchee, WA	BOG Meeting	April 16, 2026	April 7, 2026
July 23 - 24, 2026 July 25, 2026	Tulalip Resort Casino Marysville, WA	BOG Meeting BOG Planning Retreat	June 25, 2026	June 15, 2026
September 24-25, 2026	Davenport Grand Hotel Spokane, WA	BOG Meeting	September 3, 2026	August 25, 2026

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 here 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	No	Yes	No	No	Majority
3. Recess	Establishes a brief break	No	Yes	No[2]	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	No	No	No	One member
6. 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
8. Limit or extend limits of debate	Changes the debate limits	No	Yes	No	Yes	Two-thirds
9. Postpone to a certain time	Puts off the motion to a specific time	No	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	Yes[4]	No	Majority
12. Amend a motion or resolution (primary amendment)	Proposes a change to a main motion	No	Yes	Yes[4]	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.

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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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- 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.

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
    - Between Board Members
    - The Board with the Officers
    - The Board and Officers with the Staff
    - 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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WASHINGTON STATE
BAR ASSOCIATION

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: September 12, 2025

RE: WSBA Judicial Recommendation Committee September 2025 Interviews and Recommendations

---

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

The WSBA Judicial Recommendation Committee met via Zoom on September 11 and 12, 2025 to interview five individuals interested in being considered for openings on the Washington State Court of Appeals and the Washington Supreme Court. 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.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Catherine Schur, WSBA Assistant General Counsel

DATE: September 4, 2025

RE: Update on Development of New Licensing Pathways

INFORMATION: Update on Development of New Licensing Pathways

The Licensure Pathways Implementation Steering Committee will be providing an update on the development of new licensing pathways at the upcoming Board of Governors' meeting. As background information on the Committee's work, please find attached a document identifying core lawyering competencies that individuals should possess to be admitted to practice law in Washington. These competencies were identified and developed by the Steering Committee's Core Competencies Subcommittee after significant research and input from experts and interested individuals. The competencies will form the basis of the requirements of the new licensing pathways and will inform how candidates are evaluated when seeking admission through a pathway that does not rely on the Bar Exam. The Steering Committee adopted the core competencies on August 8, 2025.

Attachments
Pathways Implementation: Core Competencies

Pathways Implementation
Core Competencies Subcommittee
Core Competencies
Approved by Licensure Pathways Implementation Steering Committee Aug. 4, 2025

I. Introduction

Core lawyering competencies are baseline-level demonstratable skills, professional behaviors, and areas of knowledge that a candidate for licensure must possess to protect the public from harm in the provision of legal services. Given the interrelationship between lawyering skills, behaviors, and knowledge, there is a necessary degree of overlap between core competencies. The core competencies apply to each licensure pathway.

The competencies are based primarily on research conducted by the Institute for the Advancement of the American Legal System (IAALS), as reported in *Building a Better Bar: The Twelve Building Blocks of Minimum Competence*. The competencies also supplement with findings from IAALS' Foundations for Practice project, the NCBE's Testing Task Force's 2021 *Final Report*, other jurisdictions efforts to frame core competencies,[1] and interviews with experts in lawyer competencies and licensing[2] and Washington practitioners. Academic deans from all three Washington law schools and legal practitioners with experience in mentorship, APR 6 clerkships, and foreign legal education also provided feedback on these competencies.[3] Parentheticals below indicate the principal source from which each competency and explanation was derived.

II. Core Lawyering Competencies

A licensure candidate must demonstrate an understanding of legal processes and sources of law (IAALS 12 Building Blocks). Understanding legal processes and sources of law includes understanding the appropriate application of state and local law, federal law, administrative rules, and local court rules and understanding the channels of legal practice, including alternative dispute resolution processes, negotiation skills, legislative

[1] The committee reviewed the work of similar committees in Minnesota, Nevada, and Utah.
[2] The committee consulted with Joan Howarth, Emerita Professor of Law at UNLV's William S. Boyd School of Law and author of Shaping the Bar, The Future of Attorney Licensing; Logan Cornett, Director of Research Legal Education and Licensure at IAALS and co-author of Building a Better Bar; and Gina Alexandris, Lawyer Consultant and Coach and former Senior Director of the Law Practice Program at Toronto Metropolitan University.
[3] Thank you to the following individuals for providing their insights on these competencies: Agnieszka McPeak, Gonzaga Law Associate Dean for Academic Affairs and Program Innovation; John Eason, Seattle U Incoming Associate Dean for Academic Affairs; Brooke Coleman, Seattle U Vice Dean for Academic Affairs; Elizabeth Pendo, UW Academic Dean; Helen Boyer, attorney and mentor; Eduardo Kruel, attorney licensed in Brazil and UW LL.M. graduate; Chris Maund, Seattle U Director of International Graduate Studies; Dana Raigrodski, UW Associate Teaching Professor and Director, General Law; Anita Ramasastray, UW Associate Dean for Global and Graduate Affairs; Kelly Ruhlig, UW Law Interim Director of Graduate Programs.

processes, administrative and regulatory processes, and court processes (IAALS 12 Building Blocks).

A licensure candidate must demonstrate an understanding of threshold concepts in many subjects (IAALS 12 Building Blocks). A threshold concept is an "insight that transforms understanding of a subject." (IAALS 12 Building Blocks at 37.) Threshold concepts "distinguish individuals who have begun to master a subject from all others" and "allow new learners to understand the 'how' and 'why' of their field rather than simply the 'what.'" (IAALS 12 Building Blocks at 37.) This competency "focuses on understanding principles and policies that govern the law, rather than memorizing specific black-letter rules" and "allow lawyers to identify issues, search for the appropriate rule, and see nuances in the rule." (IAALS 12 Building Blocks at 37.)

Examples of threshold concepts include constitutional law topics, such as federal/state powers and individual rights; common law topics such as negligence, contract formation and enforcement, and rights in real property; statutory topics, such as commercial and criminal law codes; and administrative law topics, including agency powers and limits, rulemaking, and adjudication. Precisely identifying an exhaustive set of threshold concepts a candidate for licensure must understand to be competent to practice law, however, has proven challenging even to experts in attorney licensure and would likely pose significant administrative costs for licensing authorities. Nonetheless, consensus among experts holds that such threshold concepts are widely incorporated into law school curricula and, in Washington, APR 6 law clerk coursework. Therefore, rather than attempt to create a list of required threshold concepts, the Core Competencies Subcommittee anticipates that this competency will be satisfied by candidate's completion of a course of legal study in the APR 6 law clerk program or an approved[4] law school.

A licensure candidate must demonstrate the ability to act professionally and in accordance with the rules of professional conduct (IAALS 12 Building Blocks). This competency includes the demonstrated ability to conduct oneself with respect for and in accordance with the law, including compliance with the requirements of applicable state, local, and federal constitutions, laws, rules and regulations, and any applicable court order. A candidate for licensure may satisfy this competency by managing a law related workload (IAALS 12 Building Blocks, NCBE's Final Report, IAALS Foundations for Practice); coping with the stress of legal practice (IAALS 12 Building Blocks, IAALS Foundations for

[4] See the list of approved law schools generated by the Board of Governors of the Washington State Bar pursuant to APR 2(a)(5).

Practice); pursing self-directed learning (IAALS 12 Building Blocks, IAALS Foundations for Practice); understanding the business of maintaining a legal practice (IAALS Foundations for Practice, Ontario Lawyer Licensing Pathways); and appropriately using technology in legal practice.

A licensure candidate must demonstrate the ability to interpret legal materials (IAALS 12 Building Blocks, NCBE's Final Report). This competency emphasizes the ability to understand and interpret constitutional provisions, statutes, judicial opinions, and regulations and the ability to evaluate how legal documents, such as contracts, should be construed.

A licensure candidate must demonstrate the ability to identify issues (IAALS 12 Building Blocks, NCBE's Final Report). This competency emphasizes the ability to understand the "big picture" of client matters (IAALS 12 Building Blocks, IAALS Foundations); identify legal principles and legally significant facts relevant to a client matter; identify goals and objectives in client matters (IAALS 12 Building Blocks); identify legal claims and remedies that might address a client's needs (IAALS 12 Building Blocks); identify legal and practical obstacles to achieving any proposed resolution (IAALS 12 Building Blocks); and develop strategies to guide client matters (IAALS 12 Building Blocks).

A licensure candidate must demonstrate the ability to conduct research (IAALS 12 Building Blocks, NCBE's Final Report). This competency includes the ability to: research answers to specific legal questions (IAALS 12 Building Blocks); recognize relevant and/or dispositive legal sources applicable to a client matter; appreciate the authoritative weight of sources of law relevant to a client matter; utilize strategies to update sources of law and/or find additional sources of law that are relevant to a client matter (IAALS 12 Building Blocks); acquire facts and non-legal information for client matters; develop the factual record (IAALS 12 Building Blocks, NCBE's Final Report); and locate information about local rules or practices (IAALS 12 Building Blocks).

A licensure candidate must demonstrate the ability to apply legal authority to the relevant facts in a client matter. This competency emphasizes the ability to make logically sound arguments based on precedent, analogy, and policy; assess the strengths and weaknesses in a client's position and an opposing party's position; and forecast potential outcomes of a client matter.

A licensure candidate must demonstrate the ability to communicate as a lawyer (IAALS 12 Building Blocks, NCBE's Final Report). This competency includes the ability to

choose a method of communication appropriate to the circumstances and audience (IAALS 12 Building Blocks); communicate the application of legal authority to the facts in a written or oral form that is appropriate for the audience, including the client, opposing counsel, the courts, and other stakeholders; draft and edit legal documents and legal correspondence (IAALS Foundations); work collaboratively with others, including opposing counsel, to address a client matter (IAALS 12 Building Blocks); and apply negotiation skills to advocate on behalf of a client.

A licensure candidate must demonstrate the ability to interact effectively with clients (IAALS 12 Building Blocks). This competency emphasizes the ability to gain a client's trust; recognize the importance of cross-cultural competence and seek available resources to understand the needs of their clients; gather relevant facts and identify client goals (IAALS 12 Building Blocks); communicate regularly with clients, convey information and options in terms that a client can understand, and help the client choose a strategy (IAALS 12 Building Blocks); manage client expectations, convey bad news, and cope with difficult clients (IAALS 12 Building Blocks).

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Governor Nam Nguyen, on behalf of the Personnel Committee

DATE: August 18, 2025

RE: Executive Director's Annual Evaluation – Process for Executive Session and Results Sharing

---

DISCUSSION: Personnel Committee's plan for the discussion of the Executive Director's evaluation in the September 2025 BOG Meeting.

The Executive Director's performance evaluation for review period October 1, 2024 – September 30, 2025 is complete. The final report was compiled by WSBA HR Director Glynnis Klinefelter Sio and results were reviewed by Personnel Chair Nam Nguyen, President Sunitha Anjilvel, and WSBA Executive Director Terra Nevitt, who had the opportunity to respond to the report.

The Personnel Committee proposes the following process for sharing the results of the evaluation:

The final report and any response from Executive Director Nevitt will be shared with all the current Board members and officers who were invited to participate in the survey. It will be sent as a confidential document to the survey respondents via BOX per standard process.

Per WSBA bylaws (Section VII, B-7), *"Executive Session of the BOG may proceed with no persons present except the President, President-elect, Immediate Past President, Governors, Executive Director, General Counsel, and such other persons as the BOG may authorize on a case by case basis"*

The Personnel Committee is proposing this Executive Session of the BOG include:

- Current Board members and Officers
- WSBA General Counsel, Laurie Powers
- WSBA HR Director, Glynnis Klinefelter Sio
- WSBA Executive Director, Terra Nevitt – who will be invited to join in the second half of Executive Session

The results of the report, including overall scores, comments, and the Executive Director's response will be discussed in Executive Session only. Nothing discussed in Executive Session will be shared in public session.

WASHINGTON STATE
BAR ASSOCIATION

TO: WSBA Board of Governors

CC: Terra Nevitt, Executive Director

FROM: Alec Stephens, At-Large Governor and Equity & Disparity Workgroup Chair

DATE: July 21, 2023

RE: Proposed Revision of GR12.2(c) Originated by the Equity & Disparity Workgroup

SECOND READ: Proposed Revision of GR12.2(c) Originated by the Equity & Disparity Workgroup

The Equity & Disparity (E&D) Work Group was tasked with (1) reviewing rules, regulations, and laws related to the practice of law and administration of justice to identify ones that impede real justice and fairness and (2) propose solutions that mitigate harm caused by unjust rules and procedures to go before the BOG.

With a technical edit made by Gov. Alec Stephens, E&D Work Group Chair, attached is the proposal of the GR 12.2(c) Subcommittee of the E&D Work Group, which was adopted by the full Workgroup in December 2022. The Workgroup identified GR 12.2(c) as a regulation related to the practice of law and administration of justice that impedes real justice and fairness. The Workgroup offers the proposed solution for the BOG to consider and makes this presentation at the March 2023 BOG meeting for notice and intent to propose for Action as first read in June 2023, and final action on second read in August 2023. If the BOG approves the proposed change, it would be submitted to the Supreme Court for its consideration under its processes for proposed rules changes.

Background

In June of 2020 the Washington State Bar Association's (WSBA or the Bar) Board of Governors (the BOG), created the Equity & Disparity Work Group (the E&D Work Group) "to reckon with the harsh reality that laws, policies, and procedures in place in the legal system have historically led to disparate and inequitable results that disproportionately harm people of color. Achieving equity is impossible without meaningful access to justice, which necessitates addressing historical harms and challenging laws that facilitate injustices. As active participants in these systems, legal professionals are morally obligated to disrupt these gaps in justice."[1] The Washington Supreme Court's June 4, 2020, open letter[2] further informs the work of the E&D Work Group and the obligations of all legal practitioners in Washington State.

With this background, the E&D Work Group was tasked with (1) reviewing rules, regulations, and laws related to the practice of law and administration of justice to identify ones that impede real justice and fairness and (2) propose solutions that mitigate harm caused by unjust rules and procedures to go before the BOG.

[1] See Equity & Disparity Work Group (wsba.org)
[2] Judiciary Legal Community SIGNED 060420.pdf (wa.gov)

In summary is the proposal of the GR 12.2(c) Subcommittee of the E&D Work Group. As explained further below, the Subcommittee has identified GR 12.2(c) as a regulation related to the practice of law and administration of justice that impedes real justice and fairness. The Subcommittee offers the proposed solution below for the BOG to consider, with further discussion in the attached analytical statement.

GR 12.2(c) reads as follows:

> **(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.

PROPOSED LANGUAGE CHANGE

The E&D Work Group GR 12.2(c) Subcommittee proposes that the language of this rule be changed as follows:

> **(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~~ objectives of GR 12.1 or GR 12.2 (a) or (b)**;[3]
> (3) Support or oppose, in an election, candidates for public office.

[3] Original language in the Analytical Statement prepared by the E&D Work Group proposed to revise GR 12.2(c)(2) as follows: "(2) Take positions ~~on political or social issues~~ which do not relate to or affect the ~~practice of law or the administration of justice~~ regulatory objectives of GR 12.1". GR 12.1, which is titled "Regulatory Objectives", provides "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: [enumerated objectives follow]". A listing of the objectives set forth in GR 12.1 as well as 12.2 (a) and (b) are attached.

Stakeholder Input

Outreach on the GR 12 Subcommittee proposal:

The GR 12 Subcommittee conducted the feedback gathering process intending to reach three groups: members of minority bar associations (MBAs), Sections, and WSBA committees and boards. Messaging and materials were tailored specifically to each of these three groups, which were reached in a couple different ways. The minority bar associations were reached through the WSBA Equity and Justice Team. Equity and Justice Specialist Saleena Salango (who interfaces regularly with the MBAs) pushed out the messaging and materials to all MBA leaders through a listserv. The Sections and WSBA committees and boards were reached through the inVEST framework, by tapping each staff liaison to reach out individually to their entity. It is estimated that the subcommittee reached out to approximately 70 groups.

Feedback was encouraged from individuals as well as from groups as a whole via a Microsoft form, which allowed for both simple yes/no answers and long-form comments. The GR 12 Subcommittee received feedback from 13 individuals and/or groups (14 responses total—one person responded twice). Responses on behalf of groups came from MAMA Seattle, the Practice of Law Board, and the Korean American Bar Association. Responses from individuals came from members of the Civil Rights Law Section, the Low Bono Section, the World Peace Through Law Section, the Board of Bar Examiners, the Court Rules and Procedures Committee, and the Committee on Professional Ethics. All feedback received is listed on the Excel spreadsheet following this page. The general theme of the feedback received was one of positivity and support for the proposed changes. Of the 13 pieces of feedback, 12 were in support and 1 was in opposition.

A record of those comments is included in the materials in support of this action.

In addition, the chair of the GR 12 Subcommittee, Laura Sierra, attended a DEI Council meeting to explain the subcommittee's proposed changes. This council had not had time to prepare feedback as a group prior to the requested deadline, and therefore asked the GR 12 Subcommittee chair to attend a meeting to allow for additional feedback and to answer any questions. Following that meeting, the DEI Council provided a letter of support for the proposed revision and submitted that letter to the Board of Governors on February 13. 2023.

Lastly, feedback from the general WSBA membership was solicited for approximately six weeks in June and July 2023. Of the six members to respond, five were in opposition and one was in support.

A record of those comments is included in the materials.

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800-945-WSBA | 206-443-WSBA | questions@wsba.org | www.wsba.org

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

GR 12.2(c)(2) was adopted in 1987 in response to conversations and pending cases on the intersection of integrated bar activities, compelled license fees and First Amendment protections. Three years later, the U.S. Supreme Court issued Keller v. California State Bar, 496 U.S. 1 (1990). The Rule language (will not take positions on political or social issues which do not relate to of affect the practice of law or the administration of justice) is similar to the *Keller* language (mandatory fees may not be used over a member's objection for activities that are political or ideological in nature and which are not reasonably related to regulating the practice of law or improving the quality of legal services.) The Equity and Disparity Workgroup's materials do not explain exactly why GR 12.2(c)(2) was identified as a rule that "impedes real justice and fairness." This risk analysis assumes that the difficulty in defining political, social, "relate to of affect the practice of law" and "administration of justice" could create inconsistent and overly broad limitations on the WSBA's ability to take actions supporting its mission.

The proposed change to GR 12.2(c)(2) appears to align with *Keller* by prohibiting the WSBA from taking positions that do not relate to the purposes that justify the existence of the mandatory bar, as stated in GR 12.1 and 12.2. This change also aligns with the U.S. Supreme Court's statement that "the central holding in Keller. . . was that the objecting members were not required to give speech subsidies for matters not germane to the larger regulatory purpose which justified the required association." United States v. United Foods, Inc., 533 U,S, 405, 414 (2001). This later Supreme Court decision aligns with the proposed change in focusing on the purposes of the integrated bar rather than the word "political'.

The harder part of this analysis is to determine what activities might be permitted under the current Rule and prohibited under the proposed Rule and, therefore, whether the proposal more effectively supports real justice and fairness than the current Rule. It is possible that some of the activities, particularly legislative activities the WSBA and WSBA entities engage in now, might be difficult to justify under the new Rule. It might be a prudent step to engage stakeholders in a discussion of this topic. Focusing on the legislative function, this discussion could include whether law improvement is germane to the purposes of the integrated bar and, if so, it is clearly stated under the Rules.

The risk analysis of the Analytical Statement will be submitted with the Second Read 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 limited to the amount of staff time used to incorporate any approved revisions to the 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 stated goal of the Equity & Disparity Work Group is "to reckon with the harsh reality that laws, policies, and procedures in place in the legal system have historically led to disparate and inequitable results that disproportionately harm people of color." The stated purpose of the work group and their proposal to amend GR 12.2(c) is to advance equity by removing the barriers that impede real justice and fairness. Upon review of the proposed amendments and analysis in light of the stated purpose, goals and make-up of the work group, it appears that the proposal will advance equity. In terms of the process the work group engaged in, the work group sought broad feedback as well as targeted feedback from presumably impacted groups like the Minority Bar Associations and Sections but did not seek targeted feedback from staff nor the public. Staff would likely have valuable input given the partnership role they play with entities and helping them navigate the General Rules. The public, particularly the communities who experience disparate and inequitable treatment and harm, would presumably have valuable input as the one of the most impacted groups.

Attachments

About the Equity & Disparity Workgroup from WSBA Website
Analytical Statement Proposing Revision to GR 12.2(c)
GR 12.1 Objectives of the Washington Supreme Court Highlighting Key Provisions
GR 12.2 (a) & (b) Purposes and Authorized Activities of the WSBA Highlighting Key Provisions
Summary of comments from Stakeholder outreach
Summary of comments from membership outreach

Equity & Disparity Work Group

Responding to the murders of George Floyd, Breonna Taylor, Tony McDade, Charleena Lyles, Manuel Ellis, and countless others by police officers, the nationwide uprisings addressing virulent racism in the United States, as well as the COVID-19 pandemic and resulting economic devastation, the WSBA Board of Governors created the Equity & Disparity Work Group in June 2020.

On June 4, 2020, the Washington Supreme Court issued an open letter in response to many of these same events. The letter states, in part: "We call on every member of our legal community to reflect on this moment and ask ourselves how we may work together to eradicate racism.

The goal of the Equity & Disparity Work Group is to reckon with the harsh reality that laws, policies, and procedures in place in the legal system have historically led to disparate and inequitable results that disproportionately harm people of color. Achieving equity is impossible without meaningful access to justice, which necessitates addressing historical harms and challenging laws that facilitate injustices. As active participants in these systems, legal professionals are morally obligated to disrupt these gaps in justice.

The Equity & Disparity Work Group seeks to review rules, regulations, and laws related to the practice of law and administration of justice by identifying ones that impede real justice and fairness. The Equity & Disparity Work Group will then propose solutions that mitigate harm caused by unjust rules and procedures to go before the Board of Governors.

Work Group Structure and Timeline

Work Group Roster

Composition
Work Group Chair: Alec Stephens

Subcommittee Chairs:

- Laura Sierra (GR 12.2)
- Kim Sandher (Experiences of the Justice System)

The Equity & Disparity Work Group membership consists of legal professionals that represent marginalized communities in the profession, as well as in society. This Work Group seeks to amplify the experiences of people that are closest to the problems and allow for solutions that can effect positive change for the legal system.

Charter:

- Review the rules, regulations, and laws related to the practice of law and the administration of justice;

- Identify the ones that facilitate injustice;
- Solicit feedback from stakeholders, especially from marginalized communities; and
- Propose remedies that the WSBA can advance pursuant to its mandate in GR 12.2.

Timeline

- The Work Group will report to the Board of Governors every six months on its progress.
- The Work Group will submit final written majority and minority reports with recommendations for rule changes to the Board of Governors by no later than the Board's September 2022 meeting. [Extended by the Board of Governors to the March 2023 meeting.]
- The Work Group will prepare and submit any rule changes supported by the Board of Governors to the Washington Supreme Court per GR9 requirements.

Source: WSBA Website-- Home/Connect & Volunteer/**Committees, Boards & Other Groups**

WSBA

Washington State Bar Association

GENERAL RULE 12.1(C) PROPOSED ANALYTICAL STATEMENT
Submitted by the WSBA Equity & Disparity Subcommittee Agenda GR 12.2(c) Subcommittee
To the Board of Governors
March 2023

I. BACKGROUND

In June of 2020 the Washington State Bar Association's (WSBA or the Bar) Board of Governors (the BOG), created the Equity & Disparity Work Group (the E&D Work Group) "to reckon with the harsh reality that laws, policies, and procedures in place in the legal system have historically led to disparate and inequitable results that disproportionately harm people of color. Achieving equity is impossible without meaningful access to justice, which necessitates addressing historical harms and challenging laws that facilitate injustices. As active participants in these systems, legal professionals are morally obligated to disrupt these gaps in justice."[1] The Washington Supreme Court's June 4, 2020 open letter[2] further informs the work of the E&D Work Group and the obligations of all legal practitioners in Washington State. Via this letter addressed to all members of the Washington Judiciary and Legal Community the Supreme Court made clear that it is an obligation of all WSBA members to:

> *[R]ecognize that we all bear responsibility for this on-going [racial systemic] injustice, and that we are capable of taking steps to address it, if only we have the courage and the will. The injustice still plaguing our country has its roots in the individual and collective actions of many, and it cannot be addressed without the individual and collective actions of us all.*
>
> ***
>
> *[D]evelop a greater awareness of our own conscious and unconscious biases in order to make just decisions in individual cases, and we can administer justice*

[1] See Equity & Disparity Work Group (wsba.org)
[2] Judiciary Legal Community SIGNED 060420.pdf (wa.gov)

and support court rules in a way that brings greater racial justice to our system as a whole.

***

[R]ecognize the harms that are caused when meritorious claims go unaddressed due to systemic inequities or the lack of financial, personal, or systemic support. And we must also recognize that this is not how a justice *system must operate. Too often in the legal profession, we feel bound by tradition and the way things have "always" been. We must remember that even the most venerable precedent must be struck down when it is incorrect and harmful.*

With this background, the E&D Work Group was tasked with (1) reviewing rules, regulations, and laws related to the practice of law and administration of justice to identify ones that impede real justice and fairness and (2) propose solutions that mitigate harm caused by unjust rules and procedures to go before the BOG.

Below is the proposal of the GR 12.2(c) Subcommittee of the E&D Work Group. As explained further below, the Subcommittee has identified GR 12.2(c) as a regulation related to the practice of law and administration of justice that impedes real justice and fairness. The Subcommittee offers the proposed solution below for the BOG to consider.

II. AS WRITTEN AND INTERPRETED GR 12.2(c) IMPEDES REAL JUSTICE AND FAIRNESS TO THE PRACTICE OF LAW AND THE ADMINISTRATION OF JUSTICE.

As noted in the existing GR 12(C)[3] Analytical Statement adopted by the BOG on 10/22/04, "the [WSBA] is frequently requested to take a position on political or social issues and/or proposed or pending legislation." This always raises the question of whether, pursuant to GR 12.2, the WSBA is allowed to take a position on such matters. Specifically, GR 12.2(c) outlines activities of the bar association that are not authorized. While GR 12.2(c)(1) and (3) are straightforward, GR 12.2(c)(2) often raises questions.

GR 12.2(c) reads as follows:

> **(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.

[3] The 2004 Analytical Statement refers to General Rule 12(c), but the contents of that Rule have since been codified as General Rule 12.2(c).

This same prohibition is stated in Article I of the Bylaws of the WSBA. However, on its face, this prohibition appears to conflict with the general purposes of the Bar as set forth in GR 12.1 and GR 12.2 (a)-(b). Moreover, as currently interpreted, GR 12.2(c) affirmatively prevents any WSBA Section from doing exactly what the Supreme Court has demanded all WSBA members do in its open letter: take action on matters that inextricably implicate political or social justice issues. An individual member of the Bar who believes the Supreme Court's directive to be purely "political" or "social" because they do not agree, for example, that systemic racism exists and affects the practice of law and the administration of justice can invoke GR 12.2(c) to impede the Supreme Court's directive.

In addition, the work of certain sections are particularly susceptible to being viewed as "political" or "social" (*e.g.*, Cannabis Law, Civil Rights Law, Criminal Law, Environmental and Land Use Law, Health Law, Indian Law, Juvenile Law, LGBT Law, etc.), which leaves those sections particularly vulnerable to being targeted as violating GR 12.2(c). Arguably, every section can be said to deal with "political" or "social" issues. Even corporate/business law affects a wide range of issues that are often viewed as "political" or "social" (such as fair and equitable taxation). But due to the subconsciously biased lens through which we tend to look at our various sections, business-oriented sections have much more freedom to comment on legislation and make public statements.

This memorandum proposes that (1) the WSBA BOG consider a revision to the wording in GR 12.1(c)(2) that more accurately and faithfully reflects the stated purposes of the WSBA as outlined in GR 12.2(a)-(b) and (2) revise its guidance on the limitations of GR 12.1(c)(2) that comports to the proposed new language which derives its approach from GR 12.1 and GR 12.2(a)-(b).[4]

III. PROPOSED LANGUAGE CHANGE

The E&D Task Force GR 12.2(c) Subcommittee proposes that the language of this rule be changed as follows:

> **(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~~ regulatory objectives of GR 12.1**;
> (3) Support or oppose, in an election, candidates for public office.

The proposed change is simple:

[4] Note that if accepted by the Supreme Court, the BOG will also have to amend Articles I.A. and I.B of the WSBA Bylaws, which mirrors the language of GR 12.2.

1. remove the phrase "on political or social issues" as this phrase creates
    a. the perception that even if an issue affects the practice of law or the administration of justice, if it is in any way "political or [a] social issue" then WSBA cannot take a position on it; and
    b. an unnecessary conflict between legitimate legal issues germane to the practice and regulating the legal profession and free speech given that WSBA offers a Keller exemption.[5]
2. Replace the phrase "practice of law or the administration of justice" with "regulatory objectives of GR 12.1" as this:
    a. More accurately encompasses the Supreme Court's and the Bar's objectives in regulating the practice of law in Washington State; and
    b. Removes the ambiguity of the phrase "administration of law" and "affect practice of law" as described in the existing GR 12(C) Analytical Statement adopted by the BOG on 10/22/04.

The Subcommittee suggests that this approach permits the Bar and its Sections to speak on, after obtaining the proper authorization from the Bar, issues that were outlined by the Supreme Court in its June 4, 2020 letter and which are essentially already contained in GR 12.1:

> (a) protection of the public;
>
> (b) advancement of the administration of justice and the rule of law;
>
> (c) meaningful access to justice and information about the law, legal issues, and the civil and criminal justice systems;
>
> (d) 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;
>
> (e) delivery of affordable and accessible legal services;
>
> (f) efficient, competent, and ethical delivery of legal services;
>
> (g) protection of privileged and confidential information;
>
> (h) independence of professional judgment;

[5] In *Keller v. State Bar of California*, the U.S. Supreme Court ruled that a bar association may not use mandatory member fees to support political or ideological activities that are not reasonably related to the regulation of the legal profession or improving the quality of legal services. WSBA is required to identify that portion of mandatory license fees that go to such "nonchargeable" activities and establish a system whereby objecting members may either deduct that portion of their fees or receive a refund. *See* https://www.wsba.org/for-legal-professionals/license-renewal/keller-deduction.

(i) accessible civil remedies for negligence and breach of other duties owed, disciplinary sanctions for misconduct, and advancement of appropriate preventive or wellness programs;

(j) diversity and inclusion among legal services providers and freedom from discrimination for those receiving legal services and in the justice system.

The Subcommittee believes that adopting the proposed changes results in greater harmonization of the WSBA's Bylaws, the General Rules, and the obligations of all legal practitioners in the State of Washington.

IV. THE PROPOSED CHANGES TO GR 12.2(c) ALSO RESULT IN GREATER CONSISTENCY WITH THE STATED PURPOSES LISTED IN ARTICLES I.A. AND I.B. OF THE WSBA BYLAWS.

Currently, GR 12.2(c) states that the WSBA, and by extension any Section of the WSBA will not "[t]ake positions on political or social issues which do not relate to or affect the practice of law or the administration of justice." However, the language is inconsistent with the stated purposes of the Bar. Specifically, sections of GR 12.2, Purposes: In General, state that the Bar strives to, *inter alia*:

2. Promote an effective legal system, accessible to all.

3. Provide services to its members and the public.

6. Promote diversity and equality in the courts and the legal profession.

8. Administer programs of legal education.

9. Promote understanding of and respect for our legal system and the law.

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 organization and the legal profession.

All of the foregoing have the possibility of resulting in divided opinions amongst Bar members, for example: not all current Bar members agree on what an "effective legal system" or what an "accessible effective legal system" looks like – that does not make the issue a "political" or "social" one that the Bar cannot resolve. Indeed, to take such a position would lead to an absurd conclusion that neither the Bar nor any of its Sections could weigh in on any issue because there is a disagreement. Likewise, there is no question that the issue of "diversity and equality" is one that has resulted in much disagreement amongst Bar members. One need only look at the letters to the editor for the Bar News or listen in on discussions within the BOG and the Sections to conclude the same. Nonetheless "promoting diversity and equality in the courts and the legal profession" is clearly one of the Purposes enumerated by GR 12.2(a)(6)[6] and as such, any efforts

[6] By extension, it is also enumerated in the WSBA BOG's Bylaws.

to by the Bar or its Sections to speak on these matters should not be *per se* prohibited. As proposed, the new GR 12.2(c) language would achieve the goals set out in GR 12.2(a).

Likewise, as currently written, the language of GR 12.2(c) is inconsistent with sections of GR 12.2(b) Specific Activities Authorized, which state that the Bar may, *inter alia*:

> 1. Sponsor and maintain committees and sections whose activities further these purposes;
>
> 3. Provide periodic reviews and recommendations concerning court rules and procedures;
>
> 5. Inform and advise its members regarding their ethical obligations;
>
> 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;
>
> 21. Hire and retain employees to facilitate and support its mission, purposes, and activities, including in the organization's discretion, authorizing collective bargaining;

As with the analysis under GR 12.2(a), the proposed changes to GR 12.2(c) would result in a more internally consistent reading of the specific authorized activities of the Bar.

V. If the BOG and the Supreme Court Accept this Proposed Change, the BOG has the Authority to Amend the Bylaws to Ensure Consistency with the General Rules

It is well understood that as a general matter, bylaws must be internally consistent. If they are not, per Article XVI. Amendments, the BOG may amend the Bylaws, including those in Article I.C.(2), which forms the basis of GR 12.2(c), "at any regular meeting of the BOG, or at any special meeting of the BOG called for that purpose under the terms of the Bylaws." Accordingly, the BOG has the authority to amend the Bylaws as proposed by the GR 12.2(c) Subcommittee. *See* RCW 2.48.050; *cf. Parker Estates Homeowners Ass'n v. Pattison*, 197 Wn.

App. 1024, 2016 WL 7468226, at *1 (2016) (unpublished) (holding that a board of directors has the authority to amend bylaws).

Wash. Gen. R. 12.1

As amended through November 30, 2022

Rule 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:

(a) protection of the public;
(b) advancement of the administration of justice and the rule of law;
(c) meaningful access to justice and information about the law, legal issues, and the civil and criminal justice systems;
(d) 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;
(e) delivery of affordable and accessible legal services;
(f) efficient, competent, and ethical delivery of legal services;
(g) protection of privileged and confidential information;
(h) independence of professional judgment;
(i) accessible civil remedies for negligence and breach of other duties owed, disciplinary sanctions for misconduct, and advancement of appropriate preventive or wellness programs;
(j) diversity and inclusion among legal services providers and freedom from discrimination for those receiving legal services and in the justice system.

Wash. Gen. R. 12.1

Wash. Gen. R. 12.2

As amended through November 30, 2022

Rule 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;
(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.
Wash. Gen. R. 12.2

Adopted effective 7/17/1987; Amended effective 12/10/1993;9/1/1997;9/1/2007;9/1/2013;9/1/2017.

FILED
SUPREME COURT STATE
OF WASHINGTON
JUNE 5, 2025
BY SARAH R. PENDLETON
CLERK

THE SUPREME COURT OF WASHINGTON

IN THE MATTER OF THE PROPOSED AMENDMENTS TO GR 12.2—WASHINGTON STATE BAR ASSOCIATION: PURPOSES, AUTHORIZED ACTIVITIES, AND PROHIBITED ACTIVITIES	**O R D E R** NO. 25700-A-1637

The Washington State Bar Association, having recommended the adoption of the proposed amendments to GR 12.2—Washington State Bar Association: Purposes, Authorized Activities, and Prohibited Activities, and the Court having published the proposed amendments for comment, and having considered the proposed amendments, and having determined that the proposed amendments will aid in the prompt and orderly administration of justice;

Now, therefore, it is hereby

ORDERED:

(a) That the proposed amendments as attached hereto are adopted.

(b) That the proposed amendments will be published in the Washington Reports and will become effective September 1, 2025.

DATED at Olympia, Washington this 5th day of June, 2025.

Stephens, C. J.
CHIEF JUSTICE

Johnson, J.

Yu, J.

Madsen, J.

Montoya-Lewis, J.

González, J.

Whitener, J.

Gordon McCloud, J.

Mungia, J.

GR 12.2(c)(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)-(b) [Unchanged.]

(c) Activities Not Authorized. The Washington State Bar Association will not:

(1) [Unchanged.]

(2) Take positions ~~on political or social issues which~~ that do not relate to or affect the ~~practice of law or the administration of justice~~ objectives of GR 12.1 or GR 12.2(a) or (b); or

(3) [Unchanged.]

Members of the Equity and Disparity Work Group

Members and individuals who were involved in the Equity and Disparity Work Group for part or all of the time of its charter include:

Alec Stephens (chair of the Equity & Disparity Work Group)

Kim Sandher (chair of the Experiences of Justice Systems Subcommittee)

Laura Sierra (chair of the GR 12.2(c) Subcommittee)

Terra Nevitt (WSBA Executive Director)

Sara Niegowski (WSBA Chief Communications & Outreach Officer)

p hardy (former WSBA Equity and Justice Lead)

Barbara Nahouraii (staff liaison to the Experiences Subcommittee)

Kirsten Lacko (staff liaison to the GR 12.2(c) Subcommittee)

Hunter Abell (WSBA governor and current president-elect)

Rajeev Majumdar (former WSBA president)

Annette Clark (former Dean of the Seattle University of School of Law)

Jefferson Coulter (WSBA Court Rules and Procedures Committee)

Angelica Gonzalez (Latina/o Bar Association of Washington)

Melissa Hall (QLaw Association)

Monte Jewell (WSBA Committee on Professional Ethics)

Joanne Kalas (Vietnamese Bar Association of Washington)

Judge David Keenan (Access to Justice Board)

Jonathan Ko (Washington Attorneys with Disabilities Association)

Dr. Susan Le (Gonzaga University School of Law)

Molly Matter (WSBA Civil Rights Section)

John Meyers (Vietnamese Bar Association of Washington)

Ron Park (Korean American Bar Association of Washington)

Judge Rania Rampersad (South Asian Bar Association of Washington)

Chalia Stallings-Ala'ilima (WSBA Civil Rights Section)

Rebecca Stith (WSBA Council on Public Defense)

Patricia Sully (University of Washington Tacoma Legal Pathways)

Bruce Turcott (Board of Bar Examiners)

Mir Tariq (WSBA Practice of Law Board)

Aileen Tsao (Asian Bar Association of Washington)

Ailene Limric (At-Large**;** Filipino Lawyers of Washington)

Patrice Kreider-Hughes (At-Large**)**.

WASHINGTON STATE
BAR ASSOCIATION

Office of the Executive Director

MEMO

TO: Board of Governors
FROM: President Elect Francis Adewale
Executive Director Terra Nevitt
DATE: September 11, 2025
RE: Proposed FY26-29 Strategic Plan

ACTION: Adopt the FY26-29 Strategic Plan

Over the past year, the Strategic Planning Committee has been working to develop a three-year strategic plan for the FY26-29 timeframe. The plan was distributed to the Board as part of the materials for the July 17, 2025, planning retreat and is now presented for adoption. If approved, Executive Director Nevitt will present a roadmap for implementation of the plan early in FY26.

Background

The process for developing the WSBA Strategic Plan is set forth in the attached policy, which was adopted by the Board on May 2, 2024. Over the course of two retreats, facilitated by Chris Newbold, the Committee discussed the opportunities and challenges facing the organization, the profession, and the provision of legal services to the public. To support these discussions, the Committee reviewed extensive information and data to educate themselves about state and national trends. This information included feedback previously gathered from WSBA members and staff. The Committee also reviewed feedback collected at the 2025 Bar Leaders Summit at the WBSA Office. The Committee used this information to identify key areas of focus. Within each of those areas, the Committee explored WSBA's role, how success might be measured, and the root cause of why systemic challenges persist.

The Strategic Planning Committee roster is as follows:

President-Elect Francis Adewale, Co-Chair
Executive Director Terra Nevitt, Co-Chair
Deputy Executive Director Dua Abudiab, Executive Staff
Gov. Jordan Couch, LRSPC Member
Chief Regulatory Counsel Renata Garcia, Executive Staff
Gov. Kristina Larry, LRSPC Member
Gov. Nam Nguyen, LRSPC Member
Gov. Kari Petrasek, LRSPC Member
Advancement Director Kevin Plachy, Executive Staff

President Sunitha Anjilvel also participated in the planning process.

Strategic Plan Purpose and Overview

The purpose of the strategic plan is to establish and communicate a roadmap for the future of the organization as a means of moving towards and ultimately achieving WSBA's long-term goals. It does not capture the breadth or depth of WSBA's activities in carrying out its mission and is not intended to minimize

those activities. Instead, it provides direction to the Executive Director, informs how resources should be prioritized, aligns volunteers and staff, and communicates to members and the public WSBA's current areas of focus.

The FY26-29 Strategic Plan identifies four areas of focus:

1. **Access to Justice**. Advance a fair, inclusive, effective, and accessible legal system for all people in our state - ensuring all Washingtonians have the resources, knowledge, and support needed to seek justice.
2. **Technology**. Provide legal professionals with education and resources to understand and optimally utilize emerging technologies to ensure the continued delivery of high-quality, ethical legal services, improve career satisfaction, and increase the public's access to legal services.
3. **Culture**. Foster a culture where inclusivity, belonging, civility, and wellness are foundational, ensuring that all legal professionals can thrive and serve their communities and clients with excellence and integrity.
4. **Governance**. Commit to a continuous process to enhance and improve WSBA governance structures and processes to ensure transparency, accountability, and inclusive engagement, while effectively serving the needs of the legal profession and the public and appropriately preserving confidential information.

Within each of these areas of focus, the plan identifies objectives and indicators of success. The plan does not include specific deliverables or timeframes. It is intentionally flexible and meant to communicate the organization's goals at a *policy* level. The responsibility for identifying specific activities, deliverables, and timeframes lies with the Executive Director, who will report at least annually to the Board of Governors about progress towards furthering these areas of focus.

Attachments
Proposed FY26-29 Strategic Plan
WSBA Strategic Planning Process, adopted May 2, 2024

Proposed FY26-29 Strategic Plan

Proposed to Board of Governors, BOG Planning Retreat, July 19, 2025

The purpose of WSBA's strategic plan is to guide and communicate its organizational priorities. Identifying these priorities is not intended to minimize the many other activities of the organization in furtherance of its mission and its purposes and obligations under GR 12.1 and 12.2. Instead, it is intended to identify those areas that require particular focus and attention now, to address the opportunities and threats of today. In developing and executing this plan, we value:

Flexibility. While we strive to offer clarity around areas of focus, the language is also intended to be sufficiently high-level to provide flexibility to the staff and volunteers that will strive for meaningful progress on these goals over the next three-years. Additionally, we expect the unexpected and recognize that priorities may need to shift, either temporarily or permanently, in response.

Strategic Problem Solving. The challenges we face are intractable. We will not solve them in three-years, and we will not solve them without a deep understanding of why the challenge exists and what is getting in the way of success. Specific strategies and tactics should be built on such understanding.

Collaboration. Our strategies and tactics in achieving the goals of this plan are most effective when they are informed by and carried out in collaboration with others. In carrying out this plan we seek the collaboration of WSBA entities and the Supreme Court Boards we administer. We also seek to partner with judges and court staff and their professional associations, legal professionals and their affinity and local bar associations, legal service providers, and law students and legal education providers. We also seek to grow our ability to meaningfully engage with the public and partner with organizations that can uplift the needs and voices of the public.

Equity & Justice. WSBA 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. WSBA has adopted an Equity and Justice Action Plan to address the barriers that inhibit access to legal services and inclusion in the legal profession. The Equity and Justice Action Plan and the Strategic Plan are synergistic and, in some cases overlapping, and that's okay. Progress on each plan will support progress on the other.

Access to Justice

Advance a fair, inclusive, effective, and accessible legal system for all people in our state - ensuring all Washingtonians have the resources, knowledge, and support needed to seek justice.

Our objectives are to:

- Increase the public's knowledge of legal services, including when they are needed and how to access them.
- Provide meaningful tools, models, solutions, and support to legal professionals to expand legal services to communities lacking adequate access - including rural communities, criminal defendants, low- and moderate-income people, and historically marginalized groups.
- Educate, support, and inspire legal employers to cultivate workplace cultures that prioritize and incentivize pro bono and public service work.
- Promote systemic equity practices to ensure that all people have access to quality legal services and fair outcomes, regardless of identity or financial resources.
- Strengthen the accessibility, effectiveness, and funding of the courts, ensuring they are welcoming and equipped to serve all.
- Support funding and policy efforts to ensure that legal aid providers, are well-resourced, accessible, effective, and are able to serve people holistically across the civil and criminal systems.
- Encourage, support, and uplift partnerships and collaboration among legal aid providers and with justice-related and community-based organizations, Supreme Court commissions and boards, and across civil and criminal legal system providers.

We will know we are successful when:

- ❑ *The public demonstrates increased knowledge of when legal services are needed and how to access them.*
- ❑ *Historically underserved and under-resourced communities express increased trust and confidence in the legal system.*
- ❑ *Historically underserved and under-resourced communities are increasingly able to successfully navigate the courts and legal system regardless of whether they are self-represented or represented by a legal professional.*
- ❑ *Legal professionals increasingly report that they themselves and their employers value and support pro bono and public service work.*
- ❑ *Case resolution time is improved.*
- ❑ *Public defenders are better able to meet the needs of the legal system while complying with the WSBA Caseload Standards.*
- ❑ *Prosecutors have improved capacity to meet the needs of the legal system.*
- ❑ *The capacity of civil legal aid is increased.*

Technology

Provide legal professionals with education and resources to understand and optimally utilize emerging technologies to ensure the continued delivery of high-quality, ethical legal services, improve career satisfaction, and increase the public's access to legal services.

Our objectives are to:

- Provide legal professionals with tools, models, solutions, and support to responsibly and effectively use emerging technologies, including competence with respect to cyber-security, thereby enhancing career satisfaction and public access to legal services.
- Increase access to and participation in technology-focused education.
- Increase the effective, appropriate, and secure use of technology by legal professionals to expand meaningful and equitable access to legal services. This includes understanding the limitations of technology, including lack of access to technology and potential AI-driven discriminatory or biased treatment.
- Support efforts to ensure the effective, appropriate, and secure use of technology in the courts, other dispute resolution systems, and the broader legal system to expand meaningful and equitable access to justice across all jurisdictions and geographies. This includes understanding the limitations of technology, including lack of access to technology and potential AI-driven discriminatory or biased treatment.
- Monitor and address ethical challenges posed by emerging legal technology and develop accessible and meaningful ethics educational resources for legal professionals.
- Evolve and adapt our regulatory system to ensure the public can benefit from and is protected from harm by legal services delivered through emerging technology.

We will know we are successful when:

- ☐ *Legal professionals demonstrate increased competence and confidence in utilizing emerging technology and managing cyber-security risk.*
- ☐ *There is increased utilization of WSBA tools, models, solutions, and support.*
- ☐ *Legal professionals express increased satisfaction with respect to WSBA tools, models, solutions, and support.*
- ☐ *Legal professionals express increased job satisfaction as a result of integrating emerging technologies into their practices.*
- ☐ *More low- and moderate-income people, including those in rural communities, experience equitable access to legal services through the effective, appropriate, and secure use of technology.*
- ☐ *Increased use of technology in the legal system that results in greater access, quicker case resolution, and improved satisfaction by court and other legal system users.*
- ☐ *There is increased public protection as a result of effective regulation of legal services delivered through emerging technology.*

Culture

Foster a culture where inclusivity, belonging, civility, and wellness are foundational, ensuring that all legal professionals can thrive and serve their communities and clients with excellence and integrity.

Our objectives are to:

- Collaborate with courts, law schools and other legal education providers to model, inspire, support and uplift a legal culture that is resilient to its unique challenges, model civility and integrity in resolving conflict, and careers that support a meaningful and joyful life.
- Educate, support, inspire, and recognize legal employers, including the courts, to cultivate workplace cultures that attract and retain a workforce reflective of the public we serve and foster belonging and wellness in the workplace.
- Support and inspire people to pursue careers in law by addressing barriers faced by underrepresented groups—including those from rural communities, first-generation professionals, and historically marginalized identities.
- Support and uplift legal professional groups, including affinity, county, and specialty bar associations, in their efforts to promote legal communities that foster belonging and wellness.
- Facilitate meaningful mentorship opportunities, host events, and develop resources that celebrate success stories while fostering professional connections.
- Evolve wellness-focused activities offered by WSBA to meet potential participants where they are at, address the specific needs of specific communities, and approach wellness broadly to include satisfaction with the practice of law.
- Increase awareness of and participation in wellness focused activities offered by WSBA and other organizations with the goal of promoting a culture within the legal profession that understands and prioritizes the value of wellbeing.

We will know we are successful when:

- ❑ *Legal employers increasingly model inclusive, non-discriminatory hiring and retention practices that result in a workforce that reflects the diversity of Washington, including at the leadership level.*
- ❑ *Legal professionals report improved satisfaction and a sense of belonging at work and in the legal profession.*
- ❑ *Legal employers increasingly implement initiatives to support the wellness of their workforce.*
- ❑ *Legal professionals report improved work-life balance and a reduced sense of burnout.*
- ❑ *Legal professionals report greater professional enjoyment and appropriate treatment by legal colleagues.*
- ❑ *Applications for admission to law school and to the profession increasingly reflect the diversity of the communities we serve.*
- ❑ *The legal profession increasingly reflects the diversity of the state of Washington.*

Governance

Commit to a continuous process to enhance and improve WSBA governance structures and processes to ensure transparency, accountability, and inclusive engagement, while effectively serving the needs of the legal profession and the public and appropriately preserving confidential information.

Our objectives are to:

- Enhance transparency (where appropriate) and accountability with improved mechanisms and strategies for communicating with and gathering input, feedback, and perspectives from members of the public and legal community.
- Optimize WSBA's governance structures and processes through updates of and revisions to bylaws, policies, and practices,
- Foster a partnership among staff, board and other volunteers built on a foundation of respect and role clarity.
- Deepen and broaden WSBA leaderships' ongoing commitments to addressing inclusion, belonging, and equity issues with respect to legal professionals and members of the public in the legal system.

We will know we are successful when:

- ❑ *There is increasingly meaningful engagement with* members of the public and legal community *in WSBA decision making.*
- ❑ *Legal professionals, WSBA staff, board members and other volunteers, sections, Supreme Court Boards and other WSBA entities, members of the public, and other stakeholders report increased satisfaction and trust with respect to WSBA governance and decision making.*
- ❑ *Candidates for the Board and Board members demonstrate an understanding of their duties and the expectations of their role.*
- ❑ *There are improved accountability mechanisms for Board members and other volunteers.*
- ❑ *Board decision-making effectiveness and efficiency is improved.*
- ❑ *Volunteerism increases across WSBA and volunteers increasingly report that they feel they belong and their entities actively promote a culture of inclusion and belonging.*
- ❑ *Engagement in WSBA elections increases.*
- ❑ *WSBA's volunteer community better reflects the diversity of the State of Washington.*

WASHINGTON STATE
BAR ASSOCIATION

WSBA Strategic Planning Process

Adopted: May 2, 2024.

Purpose of Strategic Planning

The purpose of WSBA's strategic plan is to establish and communicate a roadmap for the future of the organization as a means of moving towards and ultimately achieving WSBA's long-term goals. The strategic plan will provide direction to the Executive Director, inform prioritization of resources, align volunteers and staff, and communicate WSBA's priorities to members, the public, and other stakeholders.

Strategic Planning Roles

President-Elect. The President-Elect collaborates with the Executive Director to lead strategic planning activities. The activities undertaken will vary each year depending on what stage of the cycle the organization is in.

Executive Director. The Executive Director collaborates with the President-Elect to lead strategic planning activities. The Executive Director is responsible for implementation of the strategic plan; any action to be taken under the strategic plan that would ordinarily require approval of the Board will be taken to the Board for approval following regular procedures. The Executive Director is also responsible for reporting progress on the strategic plan to the Board of Governors.

Board of Governors. The Board of Governors is the decision-maker with respect to the adoption of the strategic plan, as well as any revisions to the plan.

Long-Range Strategic Planning Council. The Long-Range Strategic Planning Council will monitor and provide high-level input during the strategic planning process, which will vary by strategic planning phase. During the years in which a new strategic plan is being developed, the Council receives reports from and provides input to the Strategic Planning Steering Committee. During years in which a plan is being implemented, the Council receives progress reports from the Executive Director and makes reports to the Board of Governors.

Strategic Planning Steering Committee. During years in which a new strategic plan is being developed, a Strategic Planning Steering Committee is formed as a subcommittee of the Long-Range Strategic Planning Council. It will consist of four Council members designated by the Chair of the Council and three Executive Staff members designated by the Executive Director. Every effort should be made by the Steering Committee to make decisions by consensus. In the event that consensus cannot be reached, the Steering Committee may—to minimize the influence of power dynamics—act through a secret ballot vote.

Chief Communications Officer. The Chief Communications Officer is responsible for leading stakeholder outreach and engagement. The activities undertaken by the Chief Communications Officer will vary depending on what stage of the cycle the organization is in.

Strategic Planning Cycle

Year 0 refers to the phase during which the organization develops its first strategic plan. Once the initial Plan is adopted, strategic planning is conducted on a perpetual three-year cycle. The cycle consists of (1) three years of implementation and (2) revision and refinement of the Strategic Plan in the third year in anticipation of the next three-year cycle.

Year 0 (Initial Development and Adoption of Strategic Plan)

Co-Chaired by the President-Elect and the Executive Director, in year one of each strategic planning cycle, the Steering Committee:

- Reviews data and learns about threats and opportunities for WSBA, the profession, and the public's access to the legal system.
- Identifies preliminary areas of focus and engages in activities designed to (1) understand the root causes of problems, (2) envision/identify what success looks like, (3) determine how success can be measured.
- Determines what additional information is needed and, with support from the Chief Communications Officer, actually and meaningfully involves key stakeholders.
- Reports to and gathers input from the Long-Range Strategic Planning Council.
- Proposes a three-year strategic plan for adoption by the Board of Governors.
- Ensures the three-year strategic plan informs the forthcoming budget.

Year 1 (Initial Implementation)

During Year 1, the Executive Director drives communication and implementation of the Strategic Plan adopted by the Board, including sharing the strategic plan with WSBA staff, volunteers, and entities, as well as requesting assistance in carrying out the strategic plan where appropriate. The Executive Director provides a report on how the plan is being operationalized to the Long-Range Strategic Planning Council, which reports to the Board of Governors.

Year 2 (Continued Implementation, Initial Evaluation)

In Year 2, implementation continues. The Executive Director provides a report to the Long-Range Strategic Planning Council on the Year 1 implementation, and the Council reports to the Board of Governors. At this time, the Council and Board should determine whether the plan is in need of revisions in light of preliminary results, available resources, or evolving threats and opportunities.

Year 3 (Continued Implementation, Continued Evaluation, Update Strategic Plan)

This is the final year of implementing the three-year strategic plan. The Executive Director provides a report to the Long-Range Strategic Planning Council on the Year 2 implementation, and a Steering Committee is formed to prepare a strategic plan for the next three years, following the same steps as outlined in Year 0.

WASHINGTON STATE
BAR ASSOCIATION
Office of the Executive Director

September 12, 2025

Washington State Bar Association's Board of Governors
1325 4th Ave Ste 600, Seattle, WA 98101

To the Board of Governors,

The Diversity, Equity, and Inclusion Council commends the Board of Governors on the Proposed FY26-29 Strategic Plan (Strategic Plan), and we write to voice our wholehearted support of voting to adopt the Strategic Plan. In particular, this Council would like to recognize the important inclusion of the Equity & Justice value in the Strategic Plan. For the BOG to incorporate this value—and to reference to the WSBA's Equity and Justice Action Plan—demonstrates the BOG's commitment to attaining a legal community that reflects all the communities it serves, as well as a commitment to removing barriers those communities have accessing legal services and joining the legal profession.

The Strategic Plan outlines objectives and a vision for improving Access to Justice. These pillars involve education, collaboration, building public awareness, and increasing accessibility across workplaces, courts, and community partnerships. The DEI Council is tremendously encouraged by the breadth of the goals and the specificity of the accountability in the Strategic Plan. In addition, the DEI Council appreciates how well the objectives and success measures align with the Equity and Justice Action Plan, which was an effort led by this Council over the past 2 years. We work best when we all work together.

Please consider this letter to be the emphatic endorsement of the DEI Council for the Strategic Plan.

Sincerely,

Nam Nguyen, Co-Chair

Raina Wagner, Co-Chair

WSBA Diversity, Equity & Inclusion Council