



SOLO &
SMALL
PRACTICE
SECTION

Solo & Small Practice Section
2023 Executive Committee Virtual Retreat Minutes
January 28, 2023 at 10:00am

Attendance: Kari Petrasek, Bruce Gardiner, Darcel Lobo, Ann Guinn, John Redenbaugh, Jordan Couch, Nicholas Pleasants, Emily Albrecht, Michele Moore, Carolyn MacGregor, Shashi Vijay (joined at).

- 10:10: Meeting called to order (Jordan).
- 10:13: Appointment of Michele Moore as new EC Member. Solo attorney in Ellensburg, practicing in the areas of family law, guardianships, dependency.
- 10:18: Creative Start - Mission Haiku. Everyone gave a short haiku as to why they're here, expectations for the day, and how will we succeed.
- 10:30: Current Status
- Member Recruitment – 9.5% of our section are YL's, 40.9% King Co, 13.8% Peninsula/Southern WA, 12.9% Central & Eastern WA, 9.5% Northern WA
 - Review Member Dues Amounts – Bruce doesn't think we need to increase dues, we just need to spend more of our dues.
 - CLE's – In 2021, we did 5 CLEs, in 2022 we did 6-7 CLEs.
 - Solo/Small Firm Conference – This year will be live, webcast is still being decided. It will take place at the WSBA office, mostly for economic reasons. Half-day September 22 and all-day September 23. Thinking of doing pre-conference programs Friday morning. \$3000 for 50% off passes, motion by Kari Petrasek, second by Jordan Couch. \$4000 sponsorship fee, motion by Jordan Couch, second by Kari Petrasek. \$1000 for door prizes, motion by Darcel Lobo, second by Bruce Gardiner.
 - ECC – We have 2 major categories of benefits for members: member's only area, and listserv. Roundtable recordings, podcasts, articles, law practice management tips, SSF conf chapters, prior webinar recordings.
 - Annual Membership Meeting – Have it as part of the September Conf. Provide lunch at noon, and the annual meeting would take place during that time. SSF conf planners will look into whether there would be enough space at WSBA to have the annual meeting at that time and report back at next meeting.
 - 2023 Meeting Dates: March 30, June 15, August 24, October 5, December 7. These meetings will be noon-1:30pm. January 27 will be our next retreat.
- 11:45: Budget Review – Bruce says we have money. As of December 31, 2022, we had \$104,710 in our account.
- 11:48: Board Recruitment and EC Election Planning – Nominating Committee members will be Jordan Couch and Darcel Lobo. They will reach out to a couple non-EC members to also be part of the committee. One of Jordan's goals is for the next election to be contested. Post election notices on our

- listserv, do personal reach-outs to individuals. Have people who were elected post testimonials.
- 12:05: BOG Activity – Jordan says that there are 5 proposed goals: increasing member engagement, establishing a good system for program review, support rural practice, increasing commitment to diversity and inclusion, review WSBA location. Also, member wellness is likely to be added.
- 12:08: Goal Setting
- Every election contested
 - Increase membership by 20% this year
 - Increase mini-CLEs to a minimum of 9/year
 - Find additional education channels for our members
 - Invest more time in our programs to make sure we do them really well (not create new programs).
 - Increase listserv engagement
 - Increase member engagement (attend events virtual or in-person)
 - Have more people attend our annual meetings
 - Outreach to other parts of the state and MBAs and STAR committee (3 events)
 - In 2025, would like to raise dues because we're doing so much.
 - Increase member participation in our projects.
 - Increase our membership in the ABA
- 12:30: Lunch Break
- 1:20: Creative Relaunch
- If you have 20 members in a room with you, what question would you ask them (for a piece of advice)?
- 1:45: Goal Setting – Where do we go from here?
- Pose a question on the listserv (similar to the questions we asked above) for members to answer.
 - Recruit other volunteers (at least one non-EC member) for each subcommittee)
 - Jordan will commit to doing a CLE
 - Add section discount from FIDU and Case Status, and any other discount people think would be helpful
 - Coaching discount – small discount (10%)
 - Subcommittees should look at what we've done before and figure out what can be done to get these programs/events going again.
 - Setting up mastermind groups and connecting them with each other.
 - Ann and Margoux (and others) could give practice management tips you've learned on a weekly basis. Ann would be willing to partner with us to provide a class or series of classes where people pay a small fee to attend to get tips.
 - Roundtable meetings/discussions again.
 - Create a book of practice tips to give to members when they join (you can publish on amazon pretty cheap).
 - Creating something like this is a great member benefit that will hopefully increase membership. Also, see if coaches would be willing to provide one free hour of work coaching for the first 100 "new" members. We can pay for it using our reserves.
 - Provide a travel stipend as an additional promo for new members in addition to the book to attend a CLE or other event.
- 2:30: Broke into Subcommittee Breakout Sessions
- 3:20: Subcommittee Reports
- ECC – Requesting \$5000 for next year's budget. Possibility of research/consultant, put together a newsletter, minimum of bi-monthly; pay for a fee in the newsletter and editor.
 - Education – want to send out weekly practice management tips; covered 10 months for webinars (skipping conf month of September and January), will request the 3rd Thursday of each month for our webinars. Mastermind groups using zoom. Shashi has a volunteer who will

help with the mastermind groups and recruiting.

- Membership – they are going to put together a budget enlargement request for this year to pay for swag and additional member event. Next year, the budget request is for \$10,000. Bruce cautioned to use baby steps and perhaps request a couple thousand increase.

Motion made to approve an additional \$2000 for the membership budget. Motion made by Nick Pleasants, second by Darcel Lobo.

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