



2017-18 CBA Annual Report

The Colorado Bar Association continues to serve its mission of serving as a partner in law for the legal professionals in Colorado. We strive to advance the practices, education, professionalism and volunteerism of all legal professionals in our state with networking events, up-to-date educational programming, volunteer and leadership opportunities, practice management assistance, mentoring, a job board and a lobby for areas that affect attorneys and law practice. We look to continuously serve our community and our members. The CBA Membership Department recorded 18,280 members as of July 1, 2018. This Annual Report presents a snapshot of the past fiscal year 2017-2018.

Advancing Members' Practices

The **CBA Sections and Committees Department** worked tirelessly to begin implementation of the **Best Practices Playbook**, with a goal to make all sections high functioning while also opening up paths to leadership in sections. In year one, they worked to update bylaws and standardize nomination processes. So far, sections are between 48% and 88% compliant the playbook, and on track for all sections to become 100% compliant. A similar playbook will be produced for committees.

With the assistance of sections, staff and leadership, the department hosted more than 700 CLE programs, section meetings, networking events and receptions for approximately 7,000 attendees. The department will continue to assist sections and committees in providing engaging CLE programs for their members and help sections determine best practices. More

than 10,000 CBA members are members of sections and committees.

Bar Center, a members-only co-working space at the Denver and Colorado Bar Association offices, witnessed a significant increase in usage during its second year. Offering members a stronger sense of community and collegiality, plus business amenities to enhance a 21st-century practice, Bar Center offers power for devices, meeting space, wi-fi access, printing, scanning, copying, faxing and networking events.

The **Internet & Technology Department** continued to support the Colorado Bar Association and affiliated programs in their technical needs, and continued to maintain and improve web services, network security, and data management. This includes the implementation of a database upgrade in the Fall of 2018, which improved database and web performance, and enables the development of new web features.

To enhance our member perk, **Casemaker**, CBA's free legal research tool, we added bi-monthly live training webinars, presented by a Casemaker instructor. Attendance at these webinars has soared compared to the previously offered trainings. Numbers increased from an average of 14 attendees per training to more than 130 members per training who learn tips, tricks and best practices to more effectively utilize this free legal research tool.

As technology continues to change and evolve, it can be challenging for attorneys to keep up with digital developments, manage and develop their practices, effectively represent their clients, as well as stay compliant with C.R.C.P., especially if they don't have a dedicated

IT department. To this, the CBA partnered with Affinity Consulting Group and introduced free **MGMT HQ** webinars focused on law practice management and technology-related resources for our members. Topics range from computer tips, to avoiding malpractice through the use of technology, to moving a practice into the cloud, and all webinars are recorded and available for playback. Many of the webinars are approved for CLE credit. Also free to CBA members is a subscription to Affinity University which gives members and their firms anytime access to over 100 courses representing over 30 different products.

COBALT, CBA's interactive leadership training program for lawyers with demonstrated leadership skills and commitment to the legal community, celebrated its 2018 class at a graduation ceremony on June 22 at the Ralph Carr Justice Center. During the six sessions, the class heard from prominent speakers such as Justice Monica Marquez, Justice William Hood, Justice Nancy Rice, CBA Dick Gast, Hon. Theresa Spahn, Adam Schrager, Jim Coyle, Kato Crews, Karen Hester, David Beller and many others, on topics such as authentic leadership, civic leadership, diversity, emotional intelligence, bias and inclusiveness, leadership during changing times and core guiding values.

A special congratulation to the dedicated and inspiring class of 2018: Anda Lincoln Stephenson, Ashlee Arcilla, Bryon Large, Hannah Proff, Jennifer Hall, Josh Raaz, Kelley Rider Goodwin, Kristina Bergsten, Kyle Martelon, Mallory Revel, Mario Trimble, Mary Linden, Mark Evans, Melissa Decker, Michelle Mieras,

Nicoal Sperrazza, Noah Patterson, Tess Hand-Bender, Thomas Neville and William Douth.

The **CBA Award of Merit** was given to long-time CBA member Chuck Calvin. The Outstanding Young Lawyer of the Year recipient was Surbhi Garg. Both awardees were honored at the Colorado Bar Foundation reception on September 28, 2018 at the Ralph Carr Judicial Center.

Communications

Colorado Lawyer continued to publish substantive law articles to assist attorneys with current practice issues, including features on statutory and rules changes, civil rights issues, and cannabis law. A two-part primer on space law covered international and national space laws impacting Colorado companies.

Justice William Hood III, in collaboration with the Center for Legal Inclusiveness, coordinated a special series called “You Be the Judge.” Throughout this year-long series, distinguished judges and justices at various levels of the state court system shared how and why they became a judge, and encouraged people with judicial temperament to apply for these positions.

Profiles in Success detailed the lives and accomplishments of the following “Outstanding Lawyers in Colorado History:” David Johnson Clarke, Robert Delaney, William H. Erickson, Daniel S. Hoffman, Howard Jenkins, John A. Love, Bryant O’Donnell, and Byron R. White.

Colorado Lawyer board members fielded questions for the magazine’s new Q&A feature, **Under Oath**.

Continuing Legal Education

Colorado Bar Association CLE (CBA-CLE), the nonprofit educational arm of the Colorado Bar Association, provides relevant and quality legal resources for Colorado attorneys and legal professionals. With input from attorneys and stakeholders, CBA-CLE has continued to develop new formats for programming—including holding several CLE program with content offered in shorter time frames, adding more speaker panels and new round-table formats.

CBA-CLE promoted Program Director Heidi Ray, who has 20 years of CLE programming experience, eight years of which with the DBA,

to the position of Assistant Executive Director. Bridgett Shephard also joined the team as the new program attorney, from the 18th Judicial District Attorney’s Office, where she managed a docket of felony cases.

CBA-CLE hosted more than 150 CLE programs and published 70 substantive law publications, achievements not possible without the time and dedication provided by 900 authors and close to 1,200 faculty. CBA-CLE and the CBA sections also worked together closely to produce the IP Institute, Estate Planning Retreat, Real Estate Symposium, Family Law Institute and Elder Law Retreat.

The **Programs plus Book** programs, which feature CBA legal publications as the course materials, offered the opportunity for authors and editors to highlight portions of the book and answer questions in person.

The **CBA-CLE Pass**, which offers unlimited access to a catalogue of the best CLE courses in Colorado at a discounted price, is going strong. Participation from law firms continues to increase, with many small and medium firms finding the value in offering quality and affordable programming for their attorneys.

The **Modern Law Practice Initiative** continued to focus on providing lawyers with the tools to incorporate moderate-income clients into their practices. *Successful Business Planning for the Modern Law Practice* (2nd edition) is available on the CBA website as a free download for members. A book club focusing on *Business Planning for the Modern Law Practice* met monthly to discuss the nuts and bolts of setting up a law practice.

The **Unbundling Roadshow** toured the state, providing lawyers with the tools to incorporate limited scope representation into their practices, and is in the process of enhancing the program with additional training.

Thanks to grants from the National Center for State Courts Justice for All program, the **Access to Justice Commission**, Colorado Bar Association and the **Colorado Supreme Court** developed a Strategic Action Plan. Subsequently, these same entities received an implementation grant with three components: 1) pilot a triage project; 2) develop a communications plan for access to justice in Colorado; and 3) develop a

sustainability plan with regard to implementation of the Access to Justice Strategic Plan.

The CBA **Appellate Pro Bono Program** provided legal assistance to indigent litigants in seven cases. The **Legal Fee Arbitration Committee** continued to provide arbitrations between a lawyer and a client regarding fee disputes.

The CBA Access to Justice Department continued to staff the 20-member **Colorado Access to Justice Commission**, an independent entity formed in 2003, with the support of the Colorado Supreme Court, the Colorado Bar Association and the Statewide Legal Services Group, to develop, coordinate and implement policy initiatives to expand access to and enhance the quality of justice in civil legal matters for persons who encounter barriers in gaining access to Colorado’s civil justice system.

The CBA takes position on legislation through the **Legislative Policy Committee (LPC)**—a panel of 13 members appointed by the CBA president and representatives of the CBA sections, who are assisted by appointed point people and leadership from each section. These members consider the merits of bills and make recommendations on any positions the bar should adopt. Last year, the Legislative Department also went on a road show, sharing some of our legislative policy updates to 14 local bar associations across the state to keep local bars as informed as possible on what changes in the state’s legislature will affect their members and their areas of practice.

The LPC led the bar in another successful session at the State Capitol. The 2018 session was framed by several issues: marijuana, consumer data privacy, transportation, Public Employees’ Retirement Association (PERA) funding, the opioid epidemic, and block chain financing. For the most part, the CBA monitored the issues and the bills, addressing them without taking a position or weighing in. This year, the committee looked at nearly 721 bills and took positions on 40 pieces of legislation—an outstanding achievement for the LPC and the bar association’s agenda at the Capitol.

The legislature passed all but one of the bills created or promoted by CBA sections this year: SB 18-180: The Colorado Uniform Trust Code,

SB 18-166: Changing the Maximum Jail Sentence for Certain Crimes from One Year to 364 Days (this bill failed to pass this session), HB 18-1385: Changes to Support Obligations in Domestic Relation Actions, and SB 18-109: Authorization for Notaries Public to Perform Notarial Acts Using Audio-Video Communication. For a full summary of the bills the CBA took a position on or created, see “The 2018 Legislation in Review” online in the August/September issue of *Colorado Lawyer*.

Enriching Our Communities

CBA opened the **Federal Pro Se Clinic** funded by a grant from the U.S. District Court for the District of Colorado to assist pro se litigants through limited scope representation. The CBA hopes to develop a volunteer attorney program in the near future.

The **Our Courts Colorado** program, a joint program of the Colorado Judicial Institute and the Colorado Bar Association, provides non-partisan informational programs to adult audiences around the state to further public knowledge and understanding of the state and federal courts in Colorado. In the fall of 2017, *Our Courts* expanded their reach to high school seniors in the Denver School of Science and Technology (Stapleton) with a teacher who is also an attorney. Their interactive presentation, designed to educate students about the attributes of good judges and the mechanics of Colorado’s judicial selection process, culminates with students playing the roles of district court judgeship applicants and judicial nominating committee members. We asked each student to fill out an evaluation, and the response from teachers and students was enthusiastically positive. *Our Courts* is working to grow this program to more high schools throughout Colorado.

The *Our Courts* Hispanic Outreach Committee presented three courses at Centro San Juan Diego: English as a Second Language, Citizenship and GED. The programs for ESL and Citizenship start each January, May, and September, and the GED program is a six-month course.

Last year, the arbitrators made decisions in 11 cases, as part of the Legal Fee Arbitra-

tion program, whereby volunteer arbitrators arbitrate fee disputes between attorneys and clients.

Students from Boulder County’s Fairview High School, took first in the state at the **Colorado Bar Association 34th Annual State Mock Trial Tournament** at the largest one in history, in Greeley, CO. Last year, 118 teams from around the state, including Boulder, Denver, Pueblo, Fort Collins, and Glenwood Springs competed in the tournament, which is funded and supported by the Colorado Bar Association Litigation Section and the Colorado Bar Foundation. It is the first time a Boulder County school has taken the title as State Champion. The powerhouse team was coached by attorneys Keith Edwards and Stephanie Brennan, who also served as the teacher coach, and 98-99 New Jersey State Mock Trial Champion, Jim Lewis. Denver District Court Judge and Colorado Bar Association High School Mock Trial Program Co-Chair, Hon. John W. Madden IV presided over the championship round.

Fairview High School advanced to the National Mock Trial Championship in Reno, where they argued a new case and competed with more than 1,000 students from the United States, U.S. territories and South Korea. Most teams participate in mock trials as an extracurricular activity run by teacher and attorney volunteers.

Young Lawyers Division

The **CBA Young Lawyers Division (YLD)** had another successful event-filled year. The CBA YLD hosted the American Bar Association’s Annual Fall YLD Conference in Denver October 5-7, which drew young lawyers from all over the country. The CBA YLD and DBA YLD, along with other specialty and diversity bars, held a well-attended reception welcoming new young lawyers to the Colorado legal community at Limelight Supper Club. CBA Young Lawyer Division, in conjunction with several local bar associations, held a series of state-wide micro-networking event called “Coffee Connect.” Young lawyers from around Colorado met at local coffee shops to make new connections, expand on established relationships and share a cup of coffee.



Finances

Colorado Bar Balance Sheet

Assets	2018	2017	*2016	2015	2014
Cash & cash equivalents	\$8,704,993.00	\$8,284,884.00	\$7,998,535.14	\$7,563,844.31	\$6,950,783.75
Accounts receivable	\$89,707.00	\$73,069.00	\$44,848.23	\$73,468.05	\$75,911.43
Prpd. exp & misc. assets	\$80,610.00	\$46,941.00	\$72,474.49	\$66,872.96	\$68,039.17
DBA intercompany	\$31,729.00				
Net property & equipment	\$22,024.00	\$32,375.00	\$46,298.95	\$70,256.68	\$66,143.14
Funds retirement benefit					\$161,865.82
Deposits	\$71,646.00	\$5,456.00	\$5,456.19	\$16,556.19	\$16,556.19
Other					
Total Assets	\$9,000,709.00	\$8,442,725.00	\$8,167,613.00	\$7,790,998.19	\$7,339,299.50

*2016 figures are unaudited

Liabilities and Membership Equity

	2018	2017	*2016	2015	2014
Liabilities					
Accounts Payable	\$116,525.00	\$134,326.00	\$74,979.20	\$132,612.42	\$62,490.69
Dues payable to Local Bars	\$304,614.00	\$303,385.00	\$262,400.00	\$282,010.00	\$253,525.00
Accrued compensation	\$208,517.00	\$93,017.00	\$81,228.81	\$92,738.90	\$84,549.43
Sales & Income taxes payable	\$31,362.00	\$(14,593.00)	\$15,950.84	\$9,490.37	\$(1,957.08)
Prepaid membership dues	\$1,924,226.00	\$1,541,547.00	\$1,604,687.50	\$1,577,465.00	\$1,370,440.00
DBA intercompany	\$-	\$165,683.00	\$228,435.73	\$187,670.99	\$119,307.78
Accrued retirement benefits			\$	\$	\$161,865.82
Other Deferred Income	\$4,310.00	\$4,300.00	\$1,788.66	\$15.00	\$0.01
Other	\$12,426.00	\$12,426.00	\$12,425.71	\$12,425.71	\$12,425.71
Total Liabilities	\$2,601,980.00	\$2,240,091.00	\$2,281,896.45	\$2,294,428.39	\$2,062,647.36

*2016 figures are unaudited

Liabilities and Membership Equity (continued)

	2018	2017	*2016	2015	2014
Membership Equity					
Restricted for sections	\$520,938.00	\$461,758.00	\$461,746.55	\$446,532.69	\$431,367.29
Restricted Grants	\$144,116.00	\$67,420.00			
Restricted for special projects	\$921.00	\$921.00	\$921.24	\$921.24	\$921.24
Unappropriated	\$5,732,754.00	\$5,672,535.00	\$5,423,048.76	\$5,049,115.87	\$4,838,143.34
Total Membership Equity	\$6,398,729.00	\$6,202,634.00	\$5,885,716.55	\$5,496,569.80	\$5,270,431.87
Total Liabilities & Membership Equity	\$9,000,709.00	\$8,442,725.00	\$8,167,613.00	\$7,790,998.19	\$7,333,079.23

*2016 figures are unaudited

Revenues

	2018	2017	*2016	2015	2014
Dues	\$2,998,439.00	\$3,007,565.00	\$3,075,225.50	\$2,865,063.40	\$2,688,420.00
Colorado Lawyer	\$280,434.00	\$260,950.00	\$279,734.80	\$287,634.09	\$286,515.03
Member Programs	\$2,160.00	\$4,221.00	\$6,791.28	\$11,296.48	\$21,891.17
Misc. Income	\$376,082.00	\$305,837.00	\$275,063.20	\$315,089.65	\$382,850.57
Total Revenues	\$3,657,115.00	\$3,578,573.00	\$3,636,814.78	\$3,479,083.62	\$3,379,676.77

*2016 figures are unaudited

Expenses

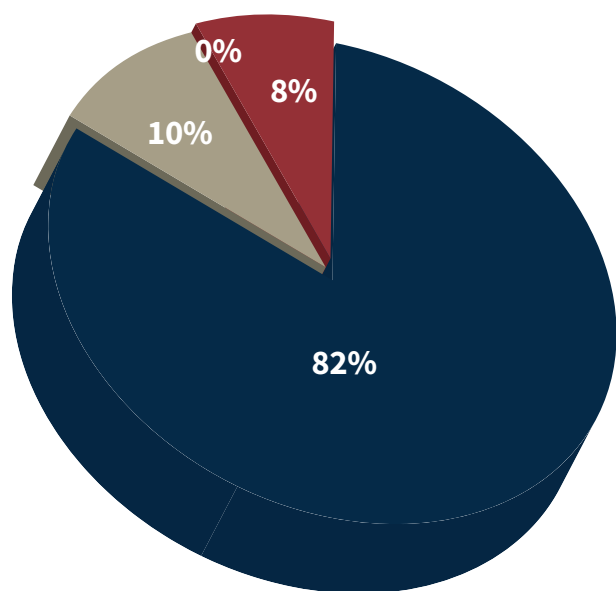
	2018	2017	*2016	2015	2014
Programs, Committe and Departments	\$1,766,078.00	\$1,702,032.00	\$1,509,430.56	\$1,431,985.02	\$1,418,253.94
Colorado Lawyer	\$545,493.00	\$542,352.00	\$561,539.13	\$600,986.13	\$610,107.60
General and Administrative	\$1,180,753.00	\$975,190.00	\$1,129,742.41	\$1,146,339.27	\$1,071,603.68
Governance and Meetings	\$104,575.00	\$109,509.00	\$62,169.79	\$88,800.67	\$67,410.86
Total Expenses	\$3,596,899.00	\$3,329,083.00	\$3,262,881.89	\$3,268,111.09	\$3,167,376.08

*2016 figures are unaudited

Surplus (deficit)	\$60,216.00	\$249,490.00	\$3,262,881.89	\$3,268,111.09	\$3,167,376.08
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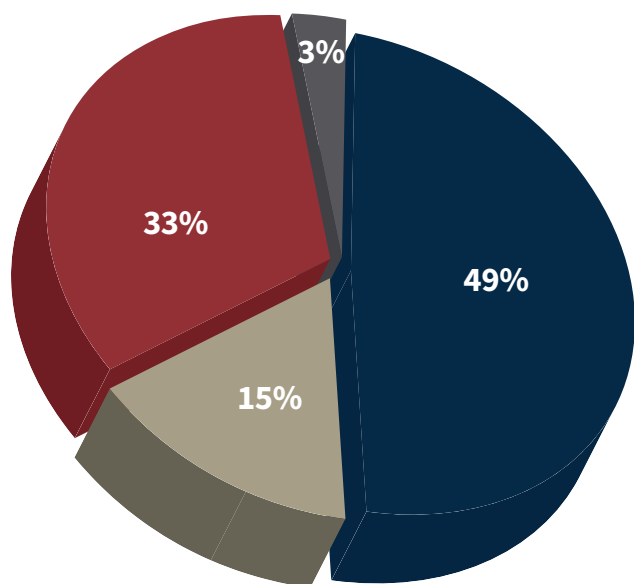
*2016 figures are unaudited

2018 Revenues



- Dues
- Misc. Income
- Colorado Lawyer
- Member Programs

2018 Expenses



- Programs, Committees, and Departments
- Colorado Lawyer
- General and Administrative
- Governance and Meetings