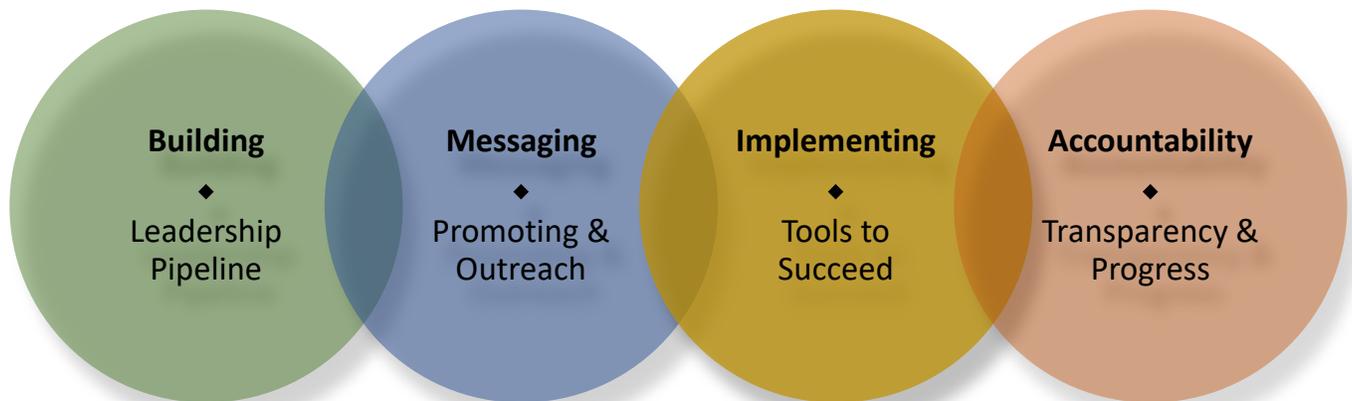

Governance & Leadership
Equity, Diversity & Inclusivity
Action Plan



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PILLAR 1

BUILDING: A LEADERSHIP PIPELINE

Building a more broad and diverse pool of leadership applicants

It is important to be intentional about recruiting diverse members. It will not happen organically.

- To encourage diverse leaders to apply for openings, transparency, clarity and personal one-on-one, meaningful outreach are critical.
- Blast emails are ineffective without meaningful outreach.

GOAL 1 Make the leadership appointment process transparent, simple, and encouraging

STRATEGY 1 Consistent nominating committee and appointment procedures each year

ACTION 1 Create a standardized application process

- Create an application that includes a resume and letter of interest for the position
- Application includes question(s) around equity, diversity & inclusivity
- Collaborate with nominating committee to draft application
- Interview the candidates
- Use early indication deadlines to create additional time to build applicant pool

ACTION 2 Draft detailed description of leadership positions' duties, qualifications, and terms so applicants easily understand the position and the role of the governing entity

- Description includes the role and purpose of the governing entity
- Description includes meeting frequency and location
- Description includes links to governing body webpage

ACTION 3 Memorialize application/nomination process with a checklist and timeline

- Early in the process circulate checklist and timeline to nominating committee chair and committee
- Post application/nomination timeline on webpage

STRATEGY 2 Year-round communication and promotion of leadership opportunities and the application process

ACTION 1 Publish leadership opportunities regularly throughout the year in The Colorado Lawyer, The Docket and other print platforms

- Include volunteer leader and staff-person contact info to learn more information

ACTION 2 Publish leadership opportunities regularly throughout the year in online communities, on social media and on website

- Publish in open forum to all members
- Publish in each section's online community

ACTION 3 Draft uniform written message with talking points for internal and external stakeholders and partners to circulate

- Use the word "apply" as it encourages more people to apply - the word "nominate" is confusing and limits applicants

ACTION 4 Meaningful personal, one-on-one outreach to diversity bar associations and other community stakeholders to invite diverse candidates to apply

- Outreach is not limited to emails but includes phone calls, attending meetings, and personal touch
- Outreach includes all the entities identified in Goal 2, Action 3
- Invite immediate past presidents of diversity bars to apply for leadership positions
- Consider assigning one Joint Steering Committee (JSC) member to each diversity bar association

ACTION 5 Collaborate with sections and committees to help communicate leadership openings during their meetings and events

- Engage staff liaisons to ensure messaging is occurring
- Assign one Steering Committee member to each and consider outreach at a microvolunteering opportunity

ACTION 6 President, President Elect, and Executive Director are actively promoting leadership openings

- Presidents and Executive Director promote leadership openings in local bar visit messaging, during Executive Committee, Board of Governors and Board of Trustees meetings and other meetings they chair and attend

ACTION 7 Create quarterly calendar with clear dates and timelines for promoting leadership opportunities for print and online platforms, at events and during meetings

- Ensure time

GOAL 2 Build a pool of diverse candidates for leadership positions

STRATEGY 1 Partner with internal and external stakeholders to identify diverse candidates

ACTION 1 Create a list of names of diverse leadership candidates

- Continue to add names to the leadership pipeline list throughout the year
- Collaborate and communicate with committees, sections, Young Lawyers Division (YLD) Councils, and Colorado Bar Leadership Training (COBALT) to identify diverse candidates to add to the pipeline list
- Ensure that the leadership pipeline list is available to all the nooks and crannies of the Associations

ACTION 2 Identify and connect with CBA | DBA's own self-identified diverse members from survey

- Staff pulls list of diverse candidates from membership survey
- Annually send email to diverse members asking if interested in leadership and increased engagement within the Associations

ACTION 3 Collaborate and communicate with external stakeholders to identify diverse candidates to add to the pipeline list

- Colorado Legal Education (CLE) faculty, author list, and diverse speakers pool
- Diversity bar associations
- Diversity bar association past and current presidents and other leadership
- Colorado Attorney Mentoring Program (CAMP)
- Local Bar leadership institute for VP positions
- Center for Legal Inclusiveness (CLI), CLI YLD, CLI – Pipeline Project, CLI – Dream Teams
- Alumni Councils at law schools
- Attorney General's Office
- City Attorneys
- Big Firms, especially CLI's constituents
- Award winners
- Judge Arguello's Law School "Yes, We Can"
- Supreme Court and Supreme Court Committees

STRATEGY 2 Implement ACTNOW Initiative (Appointing Critical Talent Now)	
ACTION 1	<p>Implement ACTNOW Initiative as part of the annual appointment process</p> <ul style="list-style-type: none"> • Update ACTNOW Chart to ensure that Presidential Appointments are transparent and understandable
ACTION 2	<p>Ask diversity bars to inform members of leadership opportunities</p>
STRATEGY 3 Increase the number of diverse leaders so CBA DBA leadership reflects the diversity of the profession in Colorado	
ACTION 1	<p>Ensure candidates on the pipeline list are in the pool for leadership appointments</p>
GOAL 3 CBA DBA Equity, Diversity & Inclusivity Joint Steering Committee is engaged in the leadership appointment and nomination process	
STRATEGY 1 Influence decision-makers making appointments	
ACTION 1	<p>Share tools to help decision-makers promote diverse candidates</p> <ul style="list-style-type: none"> • Equity, Diversity & Inclusivity Joint Steering Committee meets with presidents-elects each year before appointments • Share leadership pipeline list with decision-makers • Directors and staff liaisons promote Equity, Diversity & Inclusivity goals and diverse candidates • Equity, Diversity & Inclusivity Joint Steering Committee meets with nominating committee each year early in process
ACTION 2	<p>Identify decision-makers and calendar appointment timelines</p> <ul style="list-style-type: none"> • CBA and DBA Nominating Committees • CBA and DBA President and President-elects • Section Chairs and councils • Committee chairs • CBA Executive Council • DBA Board of Trustees • Local Bar Associations
STRATEGY 2 Help promote unknown diverse candidates to break barrier of known candidates getting appointment priority	
ACTION 1	<p>Contact decision makers to educate about a diverse candidate’s qualifications and potential</p>
ACTION 2	<p>Create a process to shepherd interested candidates into bar association governance to help educate applicants about bar operations and to raise their profile</p> <ul style="list-style-type: none"> • Follow up with applicants to encourage continued engagement with the bars and to apply again • Consider a diverse lawyer speakers’ roster for community outreach programs
ACTION 3	<p>Add the names of unsuccessful diverse candidates for leadership positions to the pipeline list</p>

PILLAR 2

MESSAGING: PROMOTING & OUTREACH

Equity, Diversity & Inclusivity help raise the bar and make us better practitioners, better professionals, and better leaders

Tell the story, tell it again, tell it one more time, and keep telling it.

- Equity, Diversity & Inclusivity are strategic goals and values of the CBA and DBA.
- Bar associations are leaders of our profession's values and priorities. We set the standards and vision in our communities. When bar associations prioritize diversity, it institutionalizes those critical values.

GOAL 1 Create and maintain a robust Equity, Diversity & Inclusivity web presence

STRATEGY 1 Create a prominent and simple web interface

ACTION 1 Post CBA | DBA Equity, Diversity & Inclusivity Joint Steering Committee's key information

- Action Plan
- Committee rosters
- Launch article
- Mission, values & goals from strategic plan
- ACTNOW leadership chart
- Links to all leadership opportunities
- Videos
- Link to ABA diversity portal
- Use diverse photos and images

ACTION 2 Publish on webpages why improving equity, diversity and inclusivity are strategic goals and values of the CBA|DBA

ACTION 3 Publish on webpages bar membership demographics and statewide demographics

STRATEGY 2 Keep webpages relevant, updated and dynamic

ACTION 1 Ensure web pages are updated quarterly

- Include links to articles published on bar platforms
- Include CLE diversity resources once finalized (e.g., speakers pool)
- Include links to other resources including diversity bars
- Include videos

GOAL 2	Create innovative messaging strategies to promote Equity, Diversity & Inclusivity across all platforms
STRATEGY 1	Embrace new strategies around messaging and education
ACTION 1	<p>Make messaging fun and creative where appropriate</p> <ul style="list-style-type: none"> Consider book club and review
ACTION 2	Use videos to promote messaging
ACTION 3	Celebrate and promote successes in sections, committees, governing bodies and from leaders
ACTION 4	Continue to make the case why improving Equity, Diversity & Inclusivity are strategic goals and values of the CBA DBA
ACTION 5	<p>Be mindful of imaging and photos that promote Equity, Diversity & Inclusivity in online and print publications</p> <ul style="list-style-type: none"> The CBA DBA websites should incorporate Diversity & Inclusivity references and imaging (e.g., Minnesota State Bar Association https://www.mnbar.org)
STRATEGY 2	Incorporate an Equity, Diversity & Inclusivity section in CBA DBA print publications
ACTION 1	Re-publish relevant articles from ABA and other resources including the diversity bars
ACTION 2	Prioritize diverse authorship in filling content for print publications
ACTION 3	<p>Create quarterly calendar with dates and topics for print publications</p> <ul style="list-style-type: none"> The Colorado Lawyer and The Docket Institutionalize regular features on Equity, Diversity & Inclusivity in print publications, like factoids and articles Remember to use strategic plan values and goals in messaging
STRATEGY 3	Promote Equity, Diversity & Inclusivity on online platforms including social media and communities
ACTION 1	<p>Use Facebook, Twitter, The Loop! & Online Communities</p> <ul style="list-style-type: none"> Collaborate and coordinate with staffs' social media plan
ACTION 2	Create quarterly calendar with dates and topics for online publications
STRATEGY 4	Encourage bar leaders to promote Equity, Diversity & Inclusivity at live events, including meetings, events, summits and local bar visits
ACTION 1	Create messaging and scripts for bar leaders for live events
STRATEGY 5	Create a mechanism to acknowledge, listen to and respond to criticism and negative feedback
ACTION 1	<p>Create a response team</p> <ul style="list-style-type: none"> Consider pre-writing response to promote fast action

PILLAR 3

IMPLEMENTING: TOOLS TO SUCCEED

Creating the tools, relationships, programs, policies, and bylaws for bar leadership to implement Equity, Diversity & Inclusivity goals

It's about more than putting new people in the room or creating a sense of belonging but developing the systems that make all of that and the steps in between, possible.

By asking the right questions and in turn developing initiatives, actions and programs to address them, equity creates the conditions for inclusivity.

- The CBA|DBA have well-intentioned leaders throughout the associations requesting support and direction to build Equity, Diversity & Inclusivity.
- The CBA|DBA need the tools, consistent procedures, and coherent institution-wide strategies to successfully achieve our Equity, Diversity & Inclusivity goals.

GOAL 1 Generate organization-wide engagement in achieving Equity, Diversity & Inclusivity goals

STRATEGY 1 Create champions and ambassadors within each governing body

ACTION 1 Use microvolunteering to implement strategies and create champions, ambassadors, and engagement in achieving goals

- Identify the action steps where microvolunteering is appropriate
- Recruit microvolunteers from bar membership, diversity bars and other stakeholders

ACTION 2 Provide ongoing sessions for key stakeholders to learn about the Equity, Diversity & Inclusivity plan and how to implement

- Present engaging programs to CBA EC, DB Board of Trustees, local bar leaders, Section and Committee chairs and councils, nominating committee

GOAL 2 Educate leaders, governing bodies and decision-makers around Equity, Diversity & Inclusivity goals

STRATEGY 1 Offer ongoing CLE, education, programming & training throughout the year

ACTION 1 Create a calendar for annual educational programs

ACTION 2 Create an Inclusive Behaviors Guide to provide to every person as they join a governing body

- See Dana Farber's Inclusive Behaviors Guide as a template: https://www.dana-farber.org/uploadedFiles/Pages/About_Us/Careers_at_Dana-Farber/inclusive-behavior-guide.pdf

ACTION 3 Educational programming should prioritize equipping leaders with Equity, Diversity & Inclusivity core competencies

- Create programming around designing inclusive meetings and events
- Create programming around implicit bias and interrupting implicit bias
- Create programming on the application process of becoming a leader in the bars' nooks and crannies
- Create programming around NCWBA Good Guys program and toolkit
- Consider national speakers like Kimberly Papillon <https://www.thebettermind.com> and Stephen Robbins <https://www.srobbins.com> who have worked with bar leaders in Michigan
- Include staff liaisons in programming
- Utilize the online Harvard Implicit Association Test (IAT) <https://implicit.harvard.edu/implicit/takeatest.html>

ACTION 4 Invite leaders, governing bodies, sections, and committees to request specific programming and CLEs, or attend specific Equity, Diversity & Inclusivity programming and CLEs

ACTION 5 Collaborate with community partners like CAMP, CLI, Diversity Bars and CLE on programming

- Publicize and invite CBA|DBA leaders to the CLI Inclusiveness Summit

ACTION 6 Utilize education tools and resources available at the ABA Diversity & Inclusion Center

<https://www.americanbar.org/groups/diversity/>

- ABA Diversity and Inclusion Resource Page: <https://www.americanbar.org/groups/diversity/resources/>
- Diversity CLE Policy: https://www.americanbar.org/content/dam/aba/administrative/diversity-portal/cle_policy_adopted_by_Board_of_Governors_june10_16.pdf
- How To Plan A Fully Accessible Meeting And Event: https://www.americanbar.org/content/dam/aba/administrative/mental_physical_disability/Accessible_Meetings_Toolkit.authcheckdam.pdf
- Equity, Diversity & Inclusivity Statistics and Research: <https://www.americanbar.org/groups/diversity/resources/>
- How ABA Celebrates Diverse Holidays and Heritage: <https://www.americanbar.org/groups/diversity/resources/celebrating-heritage-months/>
- ABA Implicit Bias Videos and Toolkit: <https://www.americanbar.org/groups/diversity/resources/implicit-bias/>
- ABA How to be an Ally Toolkit: https://www.americanbar.org/groups/diversity/sexual_orientation/resources/how-to-be-an-ally-toolkit/
- Women of Color Research Initiative Program: https://www.americanbar.org/groups/diversity/women/initiatives_awards/women_of_color_research_initiative/
- The Invisible Barriers: https://www.americanbar.org/content/dam/aba/administrative/diversity-portal/the_invisible_barriers.pdf

STRATEGY 2 Ensure the CBA|DBA Equity, Diversity & Inclusivity Joint Steering Committee stays educated on current trends and innovative ideas

ACTION 1 Send CBA delegate to annual ABA Diversity Council meeting

- Identify who goes and sponsor the trip
- Report back to the Joint Steering Committee and Governance

ACTION 2 Monitor and learn from ABA working groups and other organizations on Equity, Diversity & Inclusivity

- <https://ms-jd.org/blog/article/10-ways-combat-diversity-fatigue-arin-n-reeves>
- <https://www.americanbar.org/groups/diversity/>
- Commission on Women in the Profession
- Commission on Disability Rights
- Commission on Sexual Orientation and Gender Identity
- Council for Diversity in the Educational Pipeline
- Commission on Racial and Ethnic Diversity in the Profession
- Coalition on Racial and Ethnic Justice
- ABA Diversity & Inclusion Advisory Council

GOAL 3 Solidify new policies and procedures where needed to achieve Equity, Diversity & Inclusivity goals

STRATEGY 1 Draft and have CBA Executive Council and DBA Board of Trustees approve new policies and procedures

ACTION 1 Get input from, partner with, and collaborate with involved governing entities and staff

ACTION 2 Identify if any bylaw changes are needed to achieve Equity, Diversity & Inclusivity goals

- Must be a member of the Board of Governors to serve on the Executive Council
- Consider stating commitment to Equity, Diversity & Inclusivity in bylaws to show accountability and public commitment

GOAL 4 More robust and consistent engagement with Diversity Bar Associations

STRATEGY 1 Increase the number CBA|DBA leaders who attend diversity bar events and meetings

ACTION 1 Encourage with personal invitations section leaders, committee chairs, CBA Executive Council, DBA Board of Trustees to attend diversity bar events and meetings

- Invite broader group of bar leaders to sit at CBA|DBA sponsored tables at diversity bar events
- Utilize online communities to publicize diversity bar events and promote attendance

STRATEGY 2 Design joint social and networking events with diversity bars and CBA|DBA sections, committees, leadership, and other internal stakeholders

ACTION 1 Collaborate with CBA|DBA Presidents' Diversity Council

PILLAR 4

ACCOUNTABILITY: TRANSPARENCY, MEASURING AND REPORTING PROGRESS

Introducing leadership-wide transparency and accountability through reporting, tracking, implementing, and measuring progress

Equity, Diversity & Inclusivity is a top leadership priority and requires engagement from all levels of governance to succeed.

Publicizing the bars' progress on achieving Equity, Diversity & Inclusivity goals promotes transparency.

- The next generation of members expects and demands equitable, diverse and inclusive associations.
- All leaders and governing entities are equipped with tools, educated with programming, empowered to act and accountable for achieving Equity, Diversity & Inclusivity goals.

GOAL 1 Introduce organization-wide accountability and responsibility in achieving CBA | DBA Equity, Diversity & Inclusivity goals

STRATEGY 1 Bar leaders throughout all the nooks and crannies of the CBA | DBA are responsible for achieving Equity, Diversity & Inclusivity goals

ACTION 1 Create individual leadership Equity, Diversity & Inclusivity action plan

- Use a diversity action checklist to empower bar leaders with specific actions they can choose from to help implement the objectives of the Equity, Diversity & Inclusivity Plan
- Consider drafting checklist using Michigan's individual plan as a model

ACTION 2 Create a values statement like Building Bridges/Breaking Down Barriers/Creating Tools to Succeed that can be used to remind the CBA | DBA's governing bodies of Equity, Diversity & Inclusivity goals

- Print values statement on meeting agendas of governing bodies, committees, sections

GOAL 2 Determine demographic baseline for CBA | DBA governing body leadership positions and track and report progress

STRATEGY 1 Survey members of governance nooks and crannies to determine demographic baseline pursuant to the Refocus 20/20 Strategic Plan goal to, "track and report on diversity at all levels and compare data when possible."

ACTION 1 Track demographics of all members, committees, section chairs, councils, and nooks and crannies

ACTION 2 In survey be specific regarding the purpose for asking for information and what will be done with the information - the more specific and targeted, the better the response rate

- Make changes to policies and procedures to safeguard data collected

ACTION 3 Track all presidential appointments

ACTION 4 Make results easily accessible to governing bodies

ACTION 5 Annually report to CBA | DBA governing bodies the demographic survey and tracking results

- Publish leadership demographics and appointments in print publications and online

GOAL 3 Track and report progress in achieving Equity, Diversity & Inclusivity goals	
STRATEGY 1 Create transparent and consistent reporting to CBA DBA governing bodies on progress achieving in achieving Equity, Diversity & Inclusivity goals	
ACTION 1	Create a checklist to monitor implementation of goals, strategies and action steps
ACTION 2	Make results easily accessible to governing bodies
ACTION 3	CBA DBA Equity, Diversity & Inclusivity Joint Steering Committee reports 2 times a year to CBA Executive Council and DBA Board of Trustees on progress
ACTION 4	CBA DBA Equity, Diversity & Inclusivity Joint Steering Committee reports to CBA Board of Governors once a year
ACTION 5	Presidents' Report on progress to the Executive Council, Board of Trustees, and Board of Governors
ACTION 6	Executive Director's Report on progress to Executive Council, Board of Trustees, and Board of Governors
ACTION 7	Publish progress on webpage and in print and online publications
GOAL 4 Collect feedback from members serving on governing bodies about their experience and perception of whether the governing body promoted an equitable, diverse & inclusive environment	
STRATEGY 1 Survey members of governing bodies asking questions targeted at gathering feedback around inclusivity, engagement, satisfaction, and perceptions	
ACTION 1	Create survey to gather feedback around inclusivity, engagement, satisfaction and perceptions
ACTION 2	Track other metrics that help measure impact <ul style="list-style-type: none"> • Number of programs offered around equity, diversity & inclusivity • Tools offered to diversity bars • Number of CBA DBA leaders attending diversity bar annual events • Number of Equity, Diversity & Inclusivity posts and publications across print and online platforms
ACTION 3	Report and publish this data
STRATEGY 2 Create process for members and leaders of governing bodies to report in real time issues around non-inclusive behavior accompanied by a mechanism to address problems	
ACTION 1	Design process and policies to support reporting and intervention mechanism
GOAL 5 Make CBA DBA Equity, Diversity & Inclusivity Joint Steering Committee a standing committee	
STRATEGY 1 Solidify members, representatives, succession and terms as committee moves forward	
ACTION 1	Follow bylaw procedures for establishing a standing committee <ul style="list-style-type: none"> • Have a liaison from diversity bars serve on the CBA DBA Equity, Diversity & Inclusivity Joint Steering Committee
ACTION 2	Secure dedicated staff to help achieve Equity, Diversity & Inclusivity goals and support committee's work
STRATEGY 2 Consider use of working groups to implement Equity, Diversity & Inclusivity goals	
ACTION 1	Create a working group for each of the four pillars: Building, Messaging, Implementing, and Accountability

The CBA Executive Council and DBA Board of Trustees adopted the pillars, goals and strategies during their June 2019 meetings. The action items are potential steps and tactics to be reviewed for feasibility, impact and priority. The goals, strategies, and actions are meant to be flexible, enduring, and always open for improvement.